

## Guide to the PDR Conversation Record

The Conversation Record is simple to complete, but this guide provides some explanatory notes for sections of the form that may seem less straightforward.

The guide contains hints and tips about the type of information recommended for inclusion in various sections of the form. Remember to be flexible in your approach to the form, and make it relevant to your work area.

Planning, Development and Review Conversation Record		Confidential
<p>This form is part of the University of Adelaide's Planning, Development and Review (PDR) process and contains the key components necessary for an effective PDR conversation. Use this form to record the outcomes of the three PDR conversations. It can be stored locally or uploaded to Staff Services Online (SSO) at the Supervisor's discretion.</p> <p>Both Staff Member and Supervisor should retain a copy of the completed form at each stage.</p>		
<b>Staff Member's Name:</b> _____	<b>Review Year:</b> _____	
<b>Staff Member's Position:</b> _____	<b>Objective Setting Meeting date:</b> _____	
<b>Supervisor's Name:</b> _____	<b>Mid Term Review Meeting date:</b> _____	
<b>School/Branch:</b> _____	<b>Final Review Meeting date:</b> _____	
<b>PDR Cycle timings:</b>		
<b>Objective Setting Stage</b>	between January and March	Record on SSO by 12 April
<b>Mid Term Review Stage</b>	between June and July	Record on SSO by 16 August
<b>Final Review Stage</b>	between November and January	Record on SSO by 8 February
<p><i>Note: Whilst there should be three conversations, there can be flexibility in the PDR cycle to hold the Final Review meeting and Objective Setting meeting together.</i></p> <p>Prior to each PDR meeting both staff member and supervisor should come prepared with some ideas of work objectives and development needs/activities, or reflection on performance and achievements of these, as well as feedback for the other person.</p>		
<b>Conversation Record sections:</b>		
<b>Part 1: Objectives &amp; Achievements</b>	This section provides space for KRAs, objectives and measures to be recorded at the Objective Setting Stage and comments from both staff member and supervisor at the Mid Term and Final Review stages. People Leaders may wish to set a specific objective around their leadership role.	
<b>Part 2: Development Plan</b>	This section provides space to record outcomes of discussion around strengths, behaviours and capabilities, changes and opportunities, and tasks or work to strengthen your experience. There is a short term development plan and future direction and career plan. The 70/20/10 principle has been included to assist staff and supervisors to consider different types of development activities.	
<b>Part 3: General</b>	This section enables you to capture leave plans and declare any conflicts of interest.	
<b>Part 4: Mid Term &amp; Final Review Summary</b>	Used only in the Mid Term and Final Review Stages, this section allows you to reflect and provide some general summary comments on performance, development and achievements.	

The PDR Conversation Record has been designed to support preparation for PDR conversations and create a record of agreed objectives. Staff members are required to submit the Objective Setting and Final Review stages of their PDR Conversation Record through Staff Service Online (SSO) based on the PDR Cycle timings.

A quick reference guide for uploading PDR documentation to SSO is available on the PDR webpage.

**PART 1: Objectives & Achievements**

Consider your key result areas and work objectives for the year in conjunction with the minimum performance expectations defined in the relevant Adelaide Academic Role Statement, and specify how you will measure the achievement of each objective. Give thought to your work's alignment with the strategic objectives of the University and your School/Faculty. *It is recommended that you identify four Key Result Areas (KRAs) and set no more than 3 objectives against each KRA.* In reviewing your performance against these objectives, consider whether the measures you have set align to your achievement of these objectives. Your Individual Academic Profile (IAP) may assist with presenting evidence of your achievements.

Key Result Areas (KRA) / Work Objectives		Mid Term Review Comments	Final Review Comments
KRA:	Measure:	Staff member:	Staff member:
Objectives		Supervisor:	Supervisor:
KRA:	Measures:	Staff member:	Staff member:
Objectives		Supervisor:	Supervisor:
KRA:	Measures:	Staff member:	Staff member:
Objectives		Supervisor:	Supervisor:

**A** Form components at the Objective Setting stage.

**B** Form components at the Mid Term and Final Review stages.

Note: Remember Objectives could be updated at the Mid Term and Final Review stages.

**Mid Term and Final Review:**

In the Mid Term and Final Review conversations, use the form to record your achievements and the progress you have made against your work objectives.

The Conversation Record is a useful tool to guide PDR conversations and to ensure important but less obvious considerations such as workload allocation, leave and conflicts of interest, are discussed.

Your leader will also use the PDR Conversation Record to record comments shared with you in conversation.

The PDR Conversation Record provides guidance as to how you might structure a PDR Objective Setting Conversation.

Well written objectives, recorded in the Conversation Record are an important foundation for effective review and evaluation. Remember, you will be referring back to these objectives at the Mid Term and Final Review conversations so prepare them thoughtfully and ensure you have measures in place.

Work out 4 or 5 key result areas that are appropriate to your work area, and set no more than 3 SMART objectives against each KRA. Specify how you will measure the achievement of each objective. Recording them in the Conversation Record is good preparation for the meeting but it is also recommended that staff share these suggested objectives with their leader prior to the conversation, this will enable both parties to be prepared and have a constructive conversation.

Objectives	KRA:	Measures:	Staff member:	Staff member:
	•	•		
People Leaders only: What are your leadership objectives?			Supervisor:	Supervisor:
Objectives	KRA: LEADERSHIP	Measures:	Staff member:	Staff member:
	•	•		
			Supervisor:	Supervisor:

A

B

What support will you need to achieve your objectives?

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**PART 2: Development Plan**

Before setting your development plan for the year, reflect on the following questions:

- What strengths do you bring to the role? What opportunities are there for you to apply these strengths? How can you leverage this even more?
- In order to achieve your objectives, which behaviours or capabilities will you focus on in the next 12 months? e.g. communication
- What changes, both internal and external are affecting your work and what opportunities does this present?
- What tasks/work would you like to be involved in to increase and or strengthen your knowledge/experience/visibility

Supervisors, it is important to support your staff to identify their strengths and to do this effectively you should have a sense of what you perceive their strengths to be. It is important to consider that their ideas and yours may not always align, so be prepared to have an honest conversation.

**Short Term Development**

When considering your short term development, first identify development areas or development outcomes that will support you in your role in the short term. Identify the activity that will best provide this development and specify a timeframe to ensure that the expected outcomes are achievable and realistic. Be sure to consider the 70/20/10 principle

Development Objectives		Development Activity	Mid Term progress & comments	Final Review progress & comments
Development Area	A		Staff member:	Staff member:
Development Objectives			Supervisor:	Supervisor:
			B	

**Future Direction & Development**

What development opportunities aligned to 70/20/10 will support you in your desired future aspirations or career (for example, secondment opportunities, and discussion regarding academic promotion).

Desired Future Direction	Development Activities

**70/20/10 Learning and Development Principle**

The 70/20/10 principle views development of an individual as occurring through three basic types of activity. The numbers represent the recommended percentage that each should contribute to the learning of an individual.

**Experiential Learning 70**

Learning and Development through day-to-day tasks, challenges and practices e.g. Acting position opportunities, participation in task forces or committees, Special Studies Program (SSP)

**Social Learning 20**

Learning and development with and through others e.g. coaching, mentoring, conference attendance

**Formal Learning 10**

Learning and development through structured modules, courses and programs e.g. further study, formal workshops or seminars, online learning

Use the Conversation Record as a guide to consider your development objectives. Use the questions to reflect on your development needs, consider the areas you want to prioritise and identify objectives as well as activities that will help you meet those objectives. At this point it will be useful to consider your career direction and longer term development goals.

Use the form to record your achievements and the progress you have made against your development objectives.

**PART 3: General**

**Workload Allocation**

Refer clause 5.4.3 of the University of Adelaide Enterprise Agreement  
PDR is an opportunity to discuss workload allocation with regard to the relevant workload model.

A B

**Academic Only – Workload Allocation**

PDR meetings are a good opportunity to discuss workloads so use the PDR Conversation Record to ensure you and your leader are on the same page. Once you have agreed on the workload allocations, it will be clearer for you as you allocate your time into different types work.

**Leave Balances and Plans**

Refer clause 4.1.5 of the University of Adelaide Enterprise Agreement and the [Leave Entitlement Procedure](#).  
Annual and Long Service leave supports the health and wellbeing of staff. PDR is an opportunity to discuss your proposed leave plans for the year.

As per the Leave Entitlement Procedure, leave plans must be entered into the HRIS.

**What are your proposed leave plans for the year? Include Long Service Leave if appropriate.**

If your annual leave balance is less than 30 days (35 days for shift workers) consider how you will reduce this.

A B

**Leave Balances and Plans**

Plan your leave, and record it on the Conversation Record. Leave planning will be treated differently, depending on your work area but it is an important conversation to have to ensure business continuity.

**Conflict of Interest - Annual Declaration**

Refer to University of Adelaide [Conflict of Interest Procedure](#).  
University staff are required to formally report any personal, external or financial interests, including gifts that have the potential to create a conflict of interest.

**Do you have any declarations to make?**

A B

**Conflict of Interest Declaration**

Prepare for and complete the conflict of interest section, ensure you understand what is a conflict of interest, how to identify a conflict of interest and how to report any conflict of interest. Discussion and recording conflict of interest ensures you have the formal opportunity to disclose and manage any actual or potential conflict of interest.

**PART 4: Mid Term and Final Review Summary**

Complete this section at the Mid Term and Final Review meetings.

Staff Member

Mid Term	Final Review
<b>Is there anything stopping you from achieving your goals as well as you could?</b>	
<b>What could your supervisor do differently to better facilitate you achieving your goals?</b>	
<b>General comment on your achievements, performance and development over the year.</b>	
<b>For People Leaders only: Reflect on how you have supported a positive and productive team and fostered high performance.</b>	
<b>Supervisor</b>	
<b>General comment on staff member's achievements, performance and development over the year.</b>	

B

Save the Conversation Record once you and your leader have seen and agreed upon the comments.

Confirm completion in [Staff Services Online](#). There is a quick reference guide for [uploading PDR to SSO](#).