Planning, Development and Review Conversation Record
ACADEMIC STAFF

Confidential

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.
Both Staff Member and Supervisor should retain a copy of the completed form at each stage.

Staff Member's Name: _____

Staff Member's Position: _____

Supervisor's Name: _____

School/Branch: _____

Review Year: _____

Objective Setting Meeting date: _____

Mid Term Review Meeting date: _____

Final Review Meeting date: _____

PDR Cycle timings:

Objective Setting Stage	between January and March	Record on SSO by 9 April 2021
Mid Term Review Stage	between June and July	Record on SSO by 13 August 2021
Final Review Stage	between November and January	Record on SSO by 4 February 2022

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.

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.

Conversation Record sections:

Part 1: Objectives & Achievements	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.
Part 2: Development Plan	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.
Part 3: General	This section enables you to capture leave plans and declare any conflicts of interest.
Part 4: Mid Term & Final Review Summary	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.

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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:**

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KRA:		Measures:	Staff member:	Staff member:
Objectives	•	•		
			Supervisor:	**Supervisor:**

People Leaders only:

What are your leadership objectives?

KRA:	LEADERSHIP	Measures:	Staff member:	Staff member:
Objectives	•	•		
			Supervisor:	**Supervisor:**

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 insights does your Individual Academic Profile present? Your IAP and the relevant Faculty Adelaide Academic Role Statement are both useful tools to support your objective setting and your development plans.
- 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.

The PDR conversation is also an opportunity to consider the Staff Values and Behaviour Framework and identify any areas you would like to focus on individually, or as the member of a team. To ensure team and individual objectives are aligned, team planning prior PDR objective setting is recommended.

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

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

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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

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.

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 SSO.

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What are your proposed leave plans for the year? Include Long Service Leave if appropriate.
If your annual leave balance is in excess of 30 days (35 days for shift workers) consider how you will reduce this.

Annual Declarations
Conflict of Interest

University staff are required to formally report any personal, external or financial interests, including receiving benefits (T&L paid, an honorarium or gifts exceeding $500 per year) and have the potential to create a conflict of interest. Further information is available in the University of Adelaide Conflict of Interest Procedure.

Foreign Engagement Declaration

Government legislation and guidelines have changed the way universities are required to deal with foreign engagements. A greater level of transparency is required and applies to all offshore relationships. All staff are required to declare their foreign engagement activities annually, or more frequently when a new activity occurs. At the same time as undertaking PDR, please declare any foreign activity for which you personally have executed a formal agreement/commitment since your last such declaration by submitting a Foreign Engagement Declaration. If you do not engage in foreign activity or have no new activity since your last declaration, you are nevertheless required to submit the form annually and should select "Nothing to Declare" on the form.

Do you have any declarations to make?

Consider completing the Disclosure of Conflict of an Interest Form (**https://www.adelaide.edu.au/hr/ua/media/585/bc-coi-disclosure-form.pdf**)

Have you submitted a Foreign Engagement Declaration Y/N (**https://app.smartsheet.com/b/form/2b16d8c349ac4710b74c7fe066102f04**)

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PART 4: Mid Term and Final Review Summary

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

Your PDR review meetings are a time to revisit and confirm information in relation to Conflicts of Interest and / or Foreign Engagement Declarations.

Staff Member

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

Supervisor

General comment on staff member's achievements, performance and development over the year.	

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