## Career Development Reviews for Research Staff

## Guidance Note for Reviewers

All fixed term researchers and teaching staff are expected to positively engage in an annual review with their PI / line manager or another senior colleague in the University. Annual reviews may be called Career Development Reviews (CDR), or similar.

The CDR conversation is an opportunity for reviewees to take a constructive and proactive approach to progressing their professional development. The review is not linked in any way to performance references, discipline, reappointment or promotion.

## The purpose of the CDR conversation is to give the reviewee an opportunity to:

* have a structured and confidential conversation about career-related issues in a safe and supportive environment;
* explore their professional development goals and how these can be supported;
* consider career options and pathways to gaining relevant experience;
* discuss the activities through which the reviewee has grown and developed over the last 12 months, and their plans for the coming 12 months, along with any obstacles met and any support they might need;
* reflect on their current work, and to develop plans for the future, that may include academia, industry, public service or other sector roles.

## What is the difference between a PDR and a CDR?

A CDR is a structured and confidential conversation about a researcher’s career development. The focus of a CDR conversation is on supporting career planning and exploring personal career aspirations in any sector or in any role. The conversation should identify opportunities to improve career prospects and the pathways to further career development.

This can be distinguished from a PDR conversation which is an opportunity to reflect on achievements over the last year in an environment in which feedback can be heard and received. A PDR meeting may cover career aspirations that the reviewee wishes to share and will usually focus on achievements, learning and development, plus objective setting, within the current professional domain.

## The Process

This guidance note outlines a typical process for CDR conversations. Check with your local HR officer for details on the process in your department / faculty.

Before the meeting

1. The officer responsible for CDRs in your department will be in touch to let you know when the CDR of your staff are due and will explain the local process.
2. A template Career Conversation Planner (or equivalent) will be provided to the reviewee, and they are responsible for:
   * completing the Planner in advance of the CDR conversation;
   * sending the Planner to you 5 days in advance of the CDR conversation;
   * updating the Planner to incorporate agreed suggestions made at the meeting;
   * seeking your signature. The purpose of your signature, as reviewer, is to acknowledge and not approve the completed Planner.
   * Sending a copy of Part 2 of the Planner to the officer responsible for reviews in your department, as well as retaining the original for their sole reference;
   * implementing the actions agreed in the conversation and seeking additional support if required.
3. Agree with your reviewee a time and appropriate place for their CDR conversation to take place.

## Planning for the CDR conversation

The completed Career Conversation Planner will frame your conversation with the reviewee. Before the meeting:

* Read the completed Career Conversation Planner to assess the extent to which the reviewee has a clear aim for the conversation. What outcomes does the reviewee hope to result from the conversation?
* Consider how you might give due acknowledgment of the reviewee’s development in a range of research and other activities to date.
* If the reviewee has a clear direction or type of role in mind, encourage them to scan vacancy boards for posts that appeal, and to bring any relevant job descriptions and selection criteria to the CDR conversation, so that you are both talking about actual positions.
* Consider the appropriate location for the meeting, and ensure that it is a quiet, private, and professional space where the reviewee feels comfortable discussing their career and potentially sensitive issues.

## In the conversation

* The CDR conversation is an opportunity for the reviewee to discuss their professional and career development, and for their thoughts and opinions to be heard. Your overall role as a reviewer should be to listen, ask open questions, and to give information and advice when appropriate.
* Giving a short summary of what will happen at the meeting at the outset will help put the reviewee at ease by setting the tone for a relaxed and confidential discussion.
* Assure the reviewee that the CDR conversation will be kept confidential.
* Check that you both agree and understand what the reviewee wants to get out of the meeting to ensure that it is useful and meets expectations. (If you cannot meet an expectation, explain why not and say what you can do.) Ask the reviewee for the topics they would like to discuss.
* Guide the reviewee to consider options to the questions posed, to assess their view on the feasibility, benefits, and preference for each option. Suggest additional options, and allow the reviewee to move towards their own conclusions.
* Guide the reviewee to identify gaps between their current CV and the selection criteria of any job descriptions that they have brought to the meeting. Discuss how they might develop a plan to broaden their experience and skills, and fill the gaps.
* Note any specific skills that are holding the reviewee back or experience that is lacking. Collectively brain storm how these might be improved or addressed.
* Suggest ideas for development opportunities and initiatives over the next 12 months aimed at setting them on a path to achieve their objectives.
* Encourage the reviewee to reflect on the strength of their internal and external professional networks, as well as their plans for nurturing and expanding them with their career in mind. As a reviewer, reflect on whether there are any contacts or networks to which you could introduce the reviewee, thereby supporting their career development goals.
* Encourage the reviewee to take charge of their career planning which will demonstrate to an employer that they are proactive and self-directed. Let the reviewee know that it is not your role to provide ready-made answers.
* Be prepared to receive questions about an internal promotion or regrading. Explain the reasons for your response, especially if the options are limited by work design constraints or budget.
* Explore whether a further career development conversation with a third party would be beneficial to the reviewee. This could be with a senior colleague from the University or from your professional networks or a Careers Advisor from the Careers Service
* Consider and discuss whether the reviewee would benefit from having a [mentor](https://pod.admin.ox.ac.uk/mentoring), either as part of a formal mentoring scheme or on an informal basis.

## After the conversation

* Create regular opportunities to ask the reviewee which development goals they are pursuing and/or have engaged with.
* Highlight further opportunities for development as they arise.
* Six months after the CDR conversation, encourage the reviewee to update their Career Conversation Planner, and offer to read and comment on the changes.