## Career Development Reviews for Research Staff

## Guidance Note for Heads of Department & Professional Support Staff

Personnel Committee agreed in February 2022 that a stepped approach will be taken towards an institution-wide target in which all departments /faculties will have a scheme for Career Development Reviews (CDR) for fixed-term researchers within one to three years.

Each department/faculty is free to set up its own scheme relevant to its staff but these principles should underlie all schemes:

1. Personnel Committee agreed career development principles on [*Promoting Good Conversations at Work*](https://pod.admin.ox.ac.uk/personal-development-review-principles-0#collapse1776951) (October 2019).
2. The principles to which the University is a signatory in [*The Concordat to Support the Career Development of Researchers*](https://www.vitae.ac.uk/policy/concordat/full)September 2019 (the Concordat).

## In respect of CDRs, the Concordat states:

### Researchers must:

* *Maintain an up-to-date professional career development plan and build a portfolio of evidence demonstrating their experience that can be used to support job applications.*
* *Positively engage in career development reviews with their managers.*

### Managers of researchers must:

* *Engage in regular career development discussions with their researchers, including holding a career development review at least annually.*

### Institutions must:

* *Provide training, structured support, and time for managers to engage in meaningful career development reviews with their researchers.*
* *Monitor, and report on, the engagement of researchers and their managers with professional development activities, and researcher career development reviews.*

## A Flexible Approach

* Department or faculties may elect to combine the CDR with their current Professional Development Review (PDR) or similar existing review mechanism.
* Over the next three years, departments or faculties are encouraged to facilitate a system where the reviewees’ career journey is the key focus of the review meeting(s) and feedback on performance and objective-setting are the subject of regular semi-formal meetings held with the PI / line manager through-out the year.
* The administrative processes for implementation of CDRs should be incorporated into existing procedures for reviews, suitably adjusted where required.

## 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 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 Reviewee

The Concordat introduces an obligation on the University to introduce CDRs for all “*research staff*” which are defined as “*individuals whose primary responsibility is to conduct research and who are employed specifically for this purpose*”. Accordingly, the main cohort for CDRs is fixed term researchers at grade 6-9 inclusive. The Concordat also recognises that there are “*other groups* *of individuals who actively engage in research within institutions and who would be expected to develop their research identity as part of their career progression*” and departments may wish to extend the offer of CDRs to these researchers.

## Probation

Fixed-term research who are in their probation period do not usually take part in CDRs: the [probationary period](https://hr.admin.ox.ac.uk/probation) has its own robust review process which departments/faculties are expected to follow. Departments are encouraged to enable staff to participate in the CDR scheme during their probationary period, especially where the contract duration is under two years.

## The Reviewer

The CDR conversation will usually be facilitated by the reviewee’s PI, supervisor, or line manager. Departments / Faculties may elect for the CDR conversation to be facilitated by another senior colleague in the University. Where the reviewee would welcome a second career conversation with a Careers Advisor or sector specialist they should self-refer to the Careers Service.

## Typical Process

Each department / faculty will design their own process for implementation. It is envisaged that existing processes for PDRs can be followed in respect of CDRs. The following process is supported in accompanying documentation.

1. The coordinator responsible for CDRs in the department will contact reviewees and reviewers to let them know that the CDR is due and to explain the local process.
2. A template Career Conversation Planner (or equivalent) will be provided to the reviewee.
3. The reviewee is responsible for:
   1. completing the Planner in advance of the CDR conversation.
   2. sending the draft Planner to their reviewer 5 days in advance of the CDR conversation.
   3. updating the Planner to incorporate agreed suggestions made at the meeting.
   4. seeking the signature of the reviewer[[1]](#footnote-1).
   5. Sending a copy of Part 2 of the Planner to the officer responsible for CDRs in their department, as well as retaining Part 1 for their sole reference.
   6. implementing the Planner and seeking additional support if required.
4. Departments are encouraged to identify trends in development needs through review of Part 2 of the Career Conversation Planner (or equivalent) with a view to addressing common themes in consultation with the Researcher Hub and other training providers.

## Supporting documentation

The following documents have been prepared to support departments in rolling out CDRs.

1. Template Career Conversation Planner
2. Guidance Note for Reviewees
3. Guidance Note for Reviewers

1. The purpose of the reviewer’s signature is to acknowledge and not approve the Planner. [↑](#footnote-ref-1)