



THE UNIVERSITY *of* EDINBURGH

Guidance on Developing a Personal Development Plan for Staff where a Post has been Red-Circled

1. Introduction

This advice note provides a framework for the discussions that need to get underway once a post has been red-circled. For staff members who have decided not to appeal against the grading of their post, discussions should start as soon as possible. For those who have submitted appeals and whose appeals are unsuccessful, discussions should start at the point at which the red-circled grading is confirmed by the Appeals Panel.

In taking these discussions forward every effort should be made to ensure that informed decisions about each next step are made in good time, and involving the appropriate advice, especially from the relevant College/Support Group HR Team.

In particular, the parties involved are expected to explore ALL of the options open to the individual, before taking any action. Throughout these discussions the member of staff will be positively supported in reviewing the current situation and options for the future.

Where the individual employee is a member of one of the recognised Unions, advice and support will be available from that Union, on request. Such advice and support will supplement/complement that received from the line manager and HR. In some instances, the individual may wish to be accompanied by a Union representative in the course of the discussions. Arrangements will be made to accommodate this.

2. General Approach

The general approach to the discussions should be as follows:

- an HR Adviser will initiate discussions with the line manager to clarify the various stages in the process of moving on from being red-circled, and to assist in taking those discussions forward
- advice will be given to line managers and staff where a post has been red-circled in relation to the two major themes of 'growing the job' i.e. increasing the responsibilities of the current post to the level that it merits regrading to a higher level, and 'producing a Personal Development Plan (PDP)'
- once the process has begun, an HR Adviser must be consulted before any decision is taken regarding next stages
- the focus at the beginning of the process will be to:

- help the individual and their line manager to assess existing knowledge, skills and experience as a basis for comparing these to the post(s) in question
- consider the scope for increasing the responsibilities of the current post to the level that it merits regrading to a higher grade
- where it is not possible to increase the responsibilities of the current post to the level that merits regrading, consider the options available in relation to other posts within the University at a grade equivalent to the previous grade
- line managers should take any recent appraisal outcomes into account when developing the PDP.

An outline of the process is attached for information.

3. What to Focus On

The discussions between the line manager, the post-holder and an HR Adviser should focus on the following:

(a) Helping the post-holder to assess his/her existing knowledge, skills and experience

In this part of the discussion the line manager and the post holder, with input from the HR Adviser will focus on:

- the job content of the current post
- outcomes of any previous appraisal or review meetings that will help in the assessment
- any areas for development of knowledge and skills to meet the needs of the current post, before any modification of the job content, and using that to develop a development plan for addressing those.

(b) Reviewing the scope for increasing the responsibilities of the current post to the level that merits regrading to a higher grade

This review of the scope for increasing the responsibilities will focus on:

- the likely content of the revised post
- an early indication of the grade of that post (specific advice to be sought from HR)
- the relationship between the higher grade post and other posts in the existing organisational structure, and any issues arising
- the relationship between the higher graded post and the longer term business needs and priorities of the School/Support department

If the responsibilities of the post cannot be increased to the level that merits regrading to a higher grade, the initial assessment of skills referred to in (a) will be used as a focus in

reviewing the options in relation to other posts in the University, and an appropriate plan will be agreed to help the individual to move to another appropriate post.

(c) Focussing on the production of an appropriate Personal Development Plan (PDP) that will enable the transition to the revised higher graded post

This will centre on:

- a comparison between the knowledge, skills and experience required for the higher graded post against those the individual already has
- the production of a PDP that clearly identifies the knowledge, skills and experience the individual will need to undertake the range of responsibilities at the higher grade
- the resources required to support the individual as they follow the PDP through
- how the PDP will be monitored over a specified timescale.

(d) Considering the action which needs to be taken if an appropriate range of responsibilities cannot be organised to match the criteria of the higher grade

If the need for this discussion arises, this will focus on:

- the typical job content of a higher graded post in the University
- outcomes of any previous appraisal or review meetings
- the outcomes of the initial assessment referred to in (a)
- the production of an appropriate PDP that clearly identifies how the individual can enhance and develop their knowledge and skills to perform at a higher level
- the resources required to support the individual as they follow the PDP through
- how the PDP will be monitored over a specified timescale.

4. Additional Support

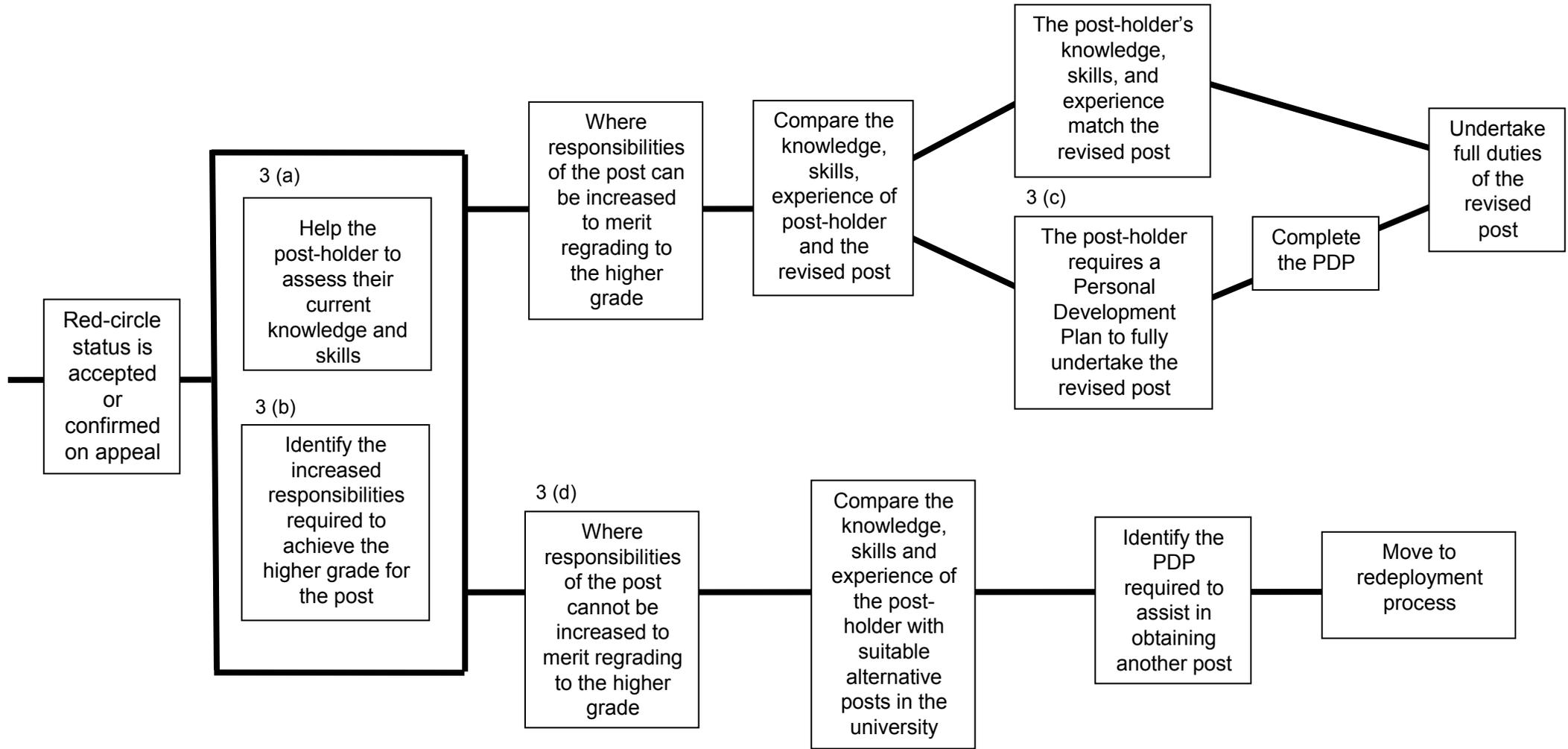
As line-managers and staff progress various discussions, they will be able to access various forms of advice and support:

- advice for the individual and the line manager from the appropriate HR Adviser - this will apply to all of the options just referred to, and particularly when decisions are being made e.g. when a PDP is being agreed, or any adjustment in organisational structure is being considered
- advice for the individual from the appropriate trades union representative.

5. Alternative Format

If you require this document in an alternative format please contact UHRS@ed.ac.uk or telephone 0131 650 8127.

PDP Flowchart



Note: the numbering above refers to Section 3 of the Guidance Note to which this flow-chart relates