



Personal Development Competency Project
Professional Services

A 3-part guide for
managers and staff

Contents



The competencies	3
Background and introduction to the competencies	3
The competencies – referenced by competence	4
The competencies – referenced by level	13
How to use the competencies	23
What are the competencies for?	23
Use in PDRs	24
The PDR forms and guidance notes	24
PDR guidance notes	25
Additional notes	36
Learning resources: a professional's toolkit	53
The PDP Support Centre	54
Learning Styles	54
Mapping the competencies	56



The competencies

Background and introduction to the competencies

Why and how the competencies have been introduced

- **PDRs**

Professional Services has a Professional Development Review (PDR) which ensures that almost all staff attend an individual meeting with their line manager at least once a year to discuss their work. In 2006 for the first time a series of nine competencies, focused on the role of management, were introduced to guide this discussion.

An original nine competencies have since been reduced to eight and a *levelling* process and inclusion of *behaviours* now means that staff working across the whole of the organisation can clearly identify and relate with the requirements of their job to organisational need.

- **Investors in People**

Professional Services is a recognised Investor in People organisation. The National Standard contains a requirement that organisations define and then communicate to all staff the 'capabilities' managers require to lead, manage and develop people.

The liP assessment report in 2006 recommended further development of both the competencies and the PDR process. It seems likely that the assessors will take a particular interest in how these areas have developed at the review in 2008.

- **Learning and development system**

Staff Learning and Development (SLD) offer a number of courses aimed at developing management capability. Recent work aimed at rationalising these, together with the introduction of a competency framework to be used for developmental purposes during the PDR, will ensure a more consistent and structured approach to management development.

Consideration needs to be given to what, if any, interdependence exists between the new HR database, the competency framework and its operation.

The current SLD strategy focuses primarily on the provision of training courses to meet a variety of learning needs, future provision will need to become more flexible and take account of individual learning styles and circumstances.

The aim of the learning and development system is to provide relevant and individually tailored learning and development interventions exactly when required supported by high quality mentoring, coaching, teaching and resources.

Purpose of the competency framework

The University of Exeter competency framework has three complementary purposes. These are to:

- Improve the Management capacity of the University at all levels, creating an entrepreneurial organisation capable of responding quickly to changes in the external environment and seizing opportunities as they arrive.
- Develop a highly trained, well motivated workforce with the mix of skills and experience required to deliver the core strategic aims of the University.
- Broaden any discussion from beyond the review of targets set and agreed to how individuals' skill, knowledge and abilities are applied in the workplace.

For Staff to achieve their full potential and take advantage of all the opportunities available to them, they must recognise the importance of, and take responsibility for their own learning and development. This needs to be encouraged and supported by Senior Management through a culture of life-long learning.

The eight competencies express the behaviour that all staff are encouraged to demonstrate in order to perform their roles effectively. The examples reflect the current priorities of the University and are not intended to be an exhaustive list, rather a benchmark of best practice.

An explanation of the levels

There are four defined levels making up the framework, which are:

- Staff
- Team leaders/Supervisors
- Managers
- Top managers

Whilst the framework has been deliberately constructed so that the behaviours within the levels are not stepped in terms of performance outputs or progression, it is expected that someone working at a higher level will display those particular behaviours and the behaviours of the levels below.

Working with the competencies at the right level is important and will be clear in most cases. However, there will be some people working in roles that might cross the levels, for example: "am I a team leader or manager?"

Where there is some ambiguity this should be discussed with the line manager so that the right criteria are used by reviewee and reviewer during the PDR.

As a general guide though the following will apply in most cases:

- Staff – HERA grades A to D
- Supervisors/Team Leaders/Managers – HERA grades E, F and G
- Top Managers - usually staff working at HERA grade H

An explanation of the behaviours

To ensure that the examples of behaviour are fit for purpose, over 100 staff from all levels were involved in telephone interviews and workshops. The outcomes from the Working Together conference, and the work already done on the "Introduction to the Competencies" and PDR process were also taken into account.

Four focus groups were established for each competency level with the purpose of defining an appropriate set of behavioural statements. The effective behaviours were agreed by staff who attended the sessions and now make up the completed framework. It is these effective behaviours that differentiate the levels, and will be used as the basis for discussion during the PDR.

The competencies – referenced by competence

How the competencies are presented here

The competencies are laid out so that it is easy to see examples of behaviour for each level of seniority. For each competence this section contains:

1. a description consisting of
 - a. a broad statement of "What it is"
 - b. a brief explanation of "Why it is important to the University"
2. some examples of effective behaviour for each of the following four levels of seniority.

Reminder of levels

- Staff – HERA grades A to D
- Supervisors/Team Leaders/Managers – HERA grades E, F and G
- Top Managers – usually staff working at HERA grade H

List of competencies

1. Leadership and motivation
2. Planning and organizing
3. Commercial awareness
4. Customer focus
5. Continuous improvement
6. Communicating and influencing
7. The ability to develop yourself and others
8. Teamwork and collaboration

Leadership and motivation

Description

Leadership and motivation is the ability to provide direction and to inspire and support others to achieve the Vision, Values and objectives of the team and the University as a whole. It requires everyone to show respect for others, tolerance and openness.

This is important for the University because everyone needs purpose, direction and focus. We all need to play our part and contribute to the success of the University.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Take pride in and responsibility for getting the job done.	Make the goals of the University real for your team.	Make it clear what you expect of individuals and your team and ensure Staff understand why.	Demonstrate commitment to the University's Vision and Values in all actions.
Keep going despite set backs or suggest improvements.	Treat all Staff fairly and do what you say you will do.	Show integrity, fairness and consistency in dealings with Staff and offer feedback, support and guidance when necessary.	Promote a shared Vision and inspire a sense of purpose throughout the University.
Have a positive attitude to the teams' goals.	Welcome ideas and encourage team involvement in decisions.	Agree challenging and realistic objectives with Staff and ensure access to relevant resources.	Clearly communicate objectives which support the Vision and Values.
Offer help and support to others when appropriate.	Help Staff to understand the need for any change, why it is happening and how it will affect them.	Set milestones, identify successes and achievements and recognise them at both team and individual level.	Recognise and celebrate the success of Staff and encourage them to learn from any failures.
Do what you say you will do.	Give constructive feedback, recognise success and celebrate achievements.	Seek to understand the nature and cause of performance issues and manage them constructively.	Lead by example, set and promote the key Values across teams.
		Make change work in your department and do what you say you will do.	Involve all Managers and encourage them to take responsibility for their area of work.

Planning and organising

Description

Planning and organising is the ability to select priorities, co-ordinate activities and make best use of resources to ensure that the University's Vision, Values and objectives are achieved. It is about all Staff knowing their criteria for success, and addressing their priorities by using their time wisely, reviewing their workload and resource needs in order to succeed.

This is important if the University is to consistently satisfy the ever more demanding needs of its customers in a sustainable and environmentally friendly way. To achieve being one of the foremost Universities means providing our Staff with an infrastructure and the best possible resources to enable them to be excellent at what they do.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Understand your own priorities/responsibilities and those of your team.	Prioritise objectives; plan/allocate work fairly to make best use of resources.	Agree your objectives and create a clear plan for your department which supports that of the University and looks to the future.	Scan the environment for information on customers, competitors and issues and use the information gained to support future planning and decision making for the University.
Manage your own workload and priorities effectively and efficiently.	Discuss and agree your objectives and priorities with your Manager.	Represent the University's plans and decisions constructively, selling the benefits in order to gain the trust and respect of Staff.	Identify and prioritise strategic objectives that are consistent with the Vision and Values.
Co-ordinate your activities with your Supervisor/Team Leader or colleagues as necessary.	Suggest improvements and raise issues with your Manager when necessary.	Ensure your plan is effectively resourced and that work is allocated to individuals and teams fairly.	Create a sense of common purpose by developing policies and systems that guide the work of others towards achieving your objectives.
Ask for guidance, help or support when you need it.	Gather and assess information from a wide variety of sources and make the links for your team.	Regularly review your plan, recognise changes in circumstances promptly and adjust accordingly.	Balance risks and resourcing requirements with desired outcomes.
	Take responsibility for meeting the milestones/targets you have agreed and provide regular feedback on progress for your Manager and team.	Set targets/milestones and monitor progress/quality of work against them.	Delegate responsibility for achieving objectives. Allocate resources effectively and hold Staff accountable.
	Regularly review progress/quality of work and make contingency plans when appropriate.	Agree your objectives and create a clear plan for your department which supports that of the University and looks to the future.	Identify milestones/metrics/methods for monitoring, evaluating and improving performance.

Commercial awareness

Description

Commercial awareness is the ability to achieve value whilst ensuring that you consider the impact of your own or your teams' action on the University. It is about fostering an entrepreneurial culture by reducing complexity, avoiding waste and maximising opportunities. It is about improving quality and working to reduce costs.

This is important for the University because we are striving to provide even higher value to our customers with lower costs. It addresses the need for Staff to build partnerships with other Universities, businesses and wider communities to engage in the development, application and transfer of knowledge, to generate investment and to foster the entrepreneurial culture we require to achieve our Vision.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Be aware of the commercial/financial implications of your own actions.	Find and utilise the most cost/time efficient ways of doing things and achieving objectives.	Confirm and understand budget requirements and monitor them throughout the year.	Anticipate likely future scenarios based on analysis of trends and developments across all sectors.
Act within the limits of your authority and seek guidance when you need it.	Consider the benefits/costs/risks of your actions and make constructive suggestions for reducing waste/inefficiency or improving quality.	Help Staff to understand your budgets and encourage them to consider the commercial and financial implications of their work.	Ensure timely submission of proposals/bids/applications and seek regular updates on progress.
Find practical ways to overcome obstacles or barriers to your success.	Motivate team members to identify ideas for reducing waste/inefficiency or improving quality.	Identify opportunities for improvement/development by being aware of best practice across all sectors.	Foster a culture of improving quality and efficiency by benchmarking and applying best practice.
Raise any ideas for improvements to services, products or efficiency.	Encourage team members to take acceptable risks in pursuing innovation and to make and learn from mistakes.	Develop effective policies and procedures to enable Staff to meet all the necessary legal, regulatory, ethical and social requirements.	Identify ideas for new products/services or improvements and respond enthusiastically to suggestions, providing feedback and ensuring that good ideas receive support and backing.
Be vigilant for possible risks and hazards.	Ensure your Staff understand what quality means and the financial consequences within the context of their job.	Seek the highest level of quality and cost effectiveness.	Establish a culture which encourages Staff to take acceptable risks and to learn from mistakes.
Strive to reduce waste and improve quality in your work.			Ensure that colleagues/staff understand the importance of assessing the commercial implications of their actions/ideas.

Customer focus

Description

Customer focus is the ability to provide and maintain the highest standards of service for all our customers. It is about putting our customers at the heart of everything we do by designing and delivering products, services and processes which meet or exceed their diverse needs.

This is important for the University because our aims, core Values and Vision are all clearly driven by the desire to satisfy our customers' needs and add value in the eyes of stakeholders.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Understand who your customers are.	Demonstrate a clear understanding of different customers and their real and perceived needs.	Identify your customers' current and future needs/expectations and plan to meet/exceed them.	Nurture relationships with a range of contacts in stakeholder organisations.
Maintain the image of the University by making sure that your appearance and behaviour are professional at all times.	Manage customer expectations by keeping them well informed and explaining changes when they happen.	Seek feedback from customers and explain the outcomes to your Staff.	Regularly meet with key stakeholders/customers in order to understand and respond to their needs.
Identify and anticipate customers' needs and do all you can to meet/exceed them.	Ensure that your team understands service level statements and the importance of customer care in their role.	Ensure that Staff understand their priorities/responsibilities in relation to customer service.	Monitor and assess the strengths, weaknesses, opportunities and threats of the services you provide and current and future developments in your sector, including competitors' activities.
Promote the University's facilities, services, products and image at all times and provide feedback to your Team Leader when you observe the needs of customers changing.	Empower staff to deliver good service, suggest improvements and solve customer problems.	Encourage Staff to suggest ways of improving customer service and respond positively to their ideas.	Measure the level of customer satisfaction being achieved, benchmarking where appropriate.
Acknowledge dissatisfied customers immediately, attend to them without delay and pass their comments to your Supervisor/Team Leader if appropriate.	Take responsibility for resolving customer problems referred to you.	Ensure that you and your Staff model behaviour that shows respect, helpfulness and co-operation.	Identify and assess opportunities to expand into new markets to meet/exceed customers' needs.
Understand who your customers are.	Be prepared to support your staff and the University and represent them professionally.		Advocate customer focus by modelling behaviour that shows respect, helpfulness and co-operation.

Continuous improvement

Description

Continuous improvement is the ability to understand, use and review the main University processes and systems. It is about encouraging a continuous improvement culture, keeping an open mind to new ideas, eliminating waste, bureaucracy and unnecessary administrative costs.

This is important to the University because, in order to succeed, we need to promote a fast, friendly and fault free culture ensuring a high level of service to the student, staff and other clients.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Look for better ways of doing things and suggest improvements.	Understand the University's needs and priorities.	Understand the purpose of the systems/processes you use.	Encourage Staff to regularly suggest improvements to the established way of doing things.
Understand how systems/processes work and why they are done that way.	Identify opportunities for improvement and follow them through.	Set standards for quality and ensure best practice.	Meet with peers to review current work methods, systems/processes.
Use systems/processes effectively.	Encourage Staff to make suggestions for improvement and follow them up.	Share ideas with colleagues to generate improvements for all.	Ensure that current methods, systems/processes support the University's objectives and reflect best practice.
Understand the effect of one system/process on another and the importance of sharing the information.	Seek support from Management in developing new ideas.	Suggest improvements to the current way we do things and the systems/processes we use.	Integrate systems and processes to avoid duplication of effort.
Identify where there is inefficiency or waste in a system/process.	Ensure the systems/processes you use do what they are meant to and add value.	Willingly share knowledge, information and access with others as needed.	Anticipate future trends and develop processes to meet them.
Look for better ways of doing things and suggest improvements.		Encourage and support Staff in identifying ways to improve things.	Ensure that everything we do is customer focused.

Communicating and influencing

Description

Communicating and influencing is the ability to communicate effectively with your own team and others who are dependent on it, ensuring that full understanding is achieved. It is about establishing openness and trust among Staff. It also involves using effective strategies to influence others both internally and externally, presenting a persuasive argument for a course of action. This is important to the University because all staff, teams and departments need to communicate openly, honestly and regularly to avoid duplication and misunderstanding, and to ensure effectiveness and efficiency.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Be constructive and positive in what you have to say.	Win respect by taking the time to communicate effectively within your team and with colleagues in other teams/ departments.	Facilitate communication across teams/ departments and act as an adviser.	Use clear, simple, inspirational and authoritative messages.
Do what you say you will do.	Liaise with stakeholders/Senior Managers for their opinions/approval.	Encourage a culture where effective communication is the norm.	Promote the need for regular communication at all levels to ensure understanding.
Be involved at meetings, ask questions, listen and give information when appropriate.	Explain the reasons for any changes and their relevance to Staff.	Gain trust and influence by understanding the needs of others.	Take time to communicate, be authentic, and develop trust and openness.
Give positive recognition / feedback to others.	Meet with staff on a regular basis both on a one-to-one and team basis.	Ensure key messages are communicated effectively at all levels.	Anticipate others reactions to what you have to say and plan for a positive outcome.
Use the appropriate method for communication, email/phone/face to face, to get information from others and follow up as necessary.	Establish good working relationships using an effective network.	Anticipate others reactions to what you have to say by understanding the needs of the audience and taking their views into account.	Use a range of strategies to influence others and win their support.
Understand the need for clarity in all your communication.			Maintain an effective network both inside and outside the University.

The ability to develop yourself and others

Description

You need to ensure that you and your team are equipped with the range of knowledge, skills and experience needed to satisfy all your customers. It is about continuously developing yourself and being prepared to coach and support others to meet the new challenges in the University. This is important because the University needs to ensure that all staff have the skills and knowledge to add value and ensure credible succession.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Identify what learning and development you need to do your job effectively.	Make time for your own development.	Make the time for your own learning and development to meet professional standards.	Act as a role model for Staff.
Be flexible and willing to adapt and learn.	Be proactive – ask for what you need/want, selling the benefits to your Manager/Team.	Set SMART development objectives for yourself and your staff.	Encourage and support Staff to make use of the learning and development opportunities available to them.
Participate fully in your Personal Development Review and agree targets for your own development.	Give on the job coaching to individuals and the team.	Identify and meet the training needs of your staff.	Understand the future talent needs of the University and plan to meet them.
Seek and respond well to feedback from your Team Leader, peers and customers.	Take time to develop Staff beyond their current tasks.	Monitor staff development by observing performance and giving constructive feedback.	Share your learning with your peers and your Managers as appropriate.
Help others to learn new skills and share information with others when necessary.	Demonstrate and share your knowledge/skills in how things can be done.	Seek regular feedback on your performance from those who will provide it honestly and objectively and act on it.	Identify potential skills shortage areas and develop resourcing plans to address them.
			Encourage Staff to learn from mistakes and help them to identify ways to improve.

Teamwork and collaboration

Description

Teamwork and collaboration is the ability to work in partnership with your own and other teams to ensure mutual understanding of objectives, effective communication and collaboration towards shared priorities. It is about creating opportunities to network across all functions recognising the interdependence of individuals and services.

This is important to the University because we all need to collaborate to meet the ultimate customer's needs. Creating an environment where everyone gains from a spirit of co-operation.

Examples of effective behaviour

Staff	Supervisors/Team Leaders	Managers	Top Managers
Understand what others do and their roles.	Ensure the team is focused on the priority issues.	Meet regularly with your own Supervisors/ Team Leaders and with your fellow Managers.	Set good examples of respect, helpfulness and co-operation.
Ask for help when you need it.	Share ideas with other Team Leaders	Network across teams to share knowledge and understanding.	Ensure the top team operate across all functions.
Consider how your actions affect the work/plans of others.	Establish a network beyond your own team.	Actively encourage integration and co-operation between teams.	Demonstrate and encourage collaboration and co-operation at the highest level.
Value the contributions of others.	Enable your team to understand the needs of others and the part they play in the University as a whole.	Ensure that objectives are clearly understood and met by your teams.	Facilitate liaison within and between all teams and departments.
Show pride in your team and the contribution it makes.	Openly appreciate team member contributions and give positive feedback.	Show integrity, fairness and consistency in relation to the team/individuals you manage.	Identify and facilitate the resolution of issues across teams/departments.
	Seek to understand the needs and motivations of your team members.		Ensure the Vision is understood and shared by all.

The competencies – referenced by level

How the competencies are presented here

The competencies are laid out so that it is easy to see examples of behaviour for each of the competencies for each level of seniority. For each level there are:

1. Examples of effective behaviour for staff
2. Examples of effective behaviour for team leaders/supervisors
3. Examples of effective behaviour for managers
4. Examples of effective behaviour for top managers

Reminder of levels

- Staff – HERA grades A to D
- Supervisors/Team Leaders/Managers – HERA grades E, F and G
- Top Managers - usually staff working at HERA grade H

List of competencies

1. Leadership and motivation
2. Planning and organizing
3. Commercial awareness
4. Customer focus
5. Continuous improvement
6. Communicating and influencing
7. The ability to develop yourself and others
8. Teamwork and collaboration

Examples of effective behaviours for staff

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Take pride in and responsibility for getting the job done.	Understand your own priorities/responsibilities and those of your team.	Be aware of the commercial/financial implications of your own actions.	Understand who your customers are.	Look for better ways of doing things and suggest improvements.	Be constructive and positive in what you have to say.	Identify what learning and development you need to do your job effectively.	Understand what others do and their roles.
Keep going despite setbacks or suggest improvements.	Manage your own workload and priorities effectively and efficiently.	Act within the limits of your authority and seek guidance when you need it.	Maintain the image of the University by making sure that your appearance and behaviour are professional at all times.	Understand how systems/processes work and why they are done that way.	Do what you say you will do.	Be flexible and willing to adapt and learn.	Ask for help when you need it.
Have a positive attitude to the teams' goals.	Co-ordinate your activities with your Supervisors/Team Leaders or colleagues as necessary.	Find practical ways to overcome obstacles or barriers to your success.	Identify and anticipate customers' needs and do all you can to meet/exceed them.	Use systems/processes effectively.	Be involved at meetings, ask questions, listen and give information when appropriate.	Participate fully in your Personal Development Review and agree targets for your own development.	Consider how your actions affect the work/plans of others.
Offer help and support to others when appropriate.	Ask for guidance, help or support when you need it.	Raise any ideas for improvements to services, products or efficiency.	Promote the University's facilities, services, products and image at all times and provide feedback to your Team Leader when you observe the needs of customers changing.	Understand the effect of one system/process on another and the importance of sharing the information.	Give positive recognition/feedback to others.	Seek and respond well to feedback from your Team Leader, peers and customers.	Value the contributions of others.

Examples of effective behaviours for staff *contd.*

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Do what you say you will do.	Be prepared to work on your own initiative and think things through.	Be vigilant for possible risks and hazards.	Acknowledge dissatisfied customers immediately, attend to them without delay and pass their comments to your Supervisor/Team Leader if appropriate	Identify where there is inefficiency or waste in a system/process.	Use the appropriate method for communication, email/phone/face to face, to get information from others and follow up as necessary.	Help others to learn new skills and share information with others when necessary.	Show pride in your team and the contribution it makes.
		Strive to reduce waste and improve quality in your work.	Understand who your customers are.		Understand the need for clarity in all your communication.		

Examples of effective behaviours for team leaders/supervisors

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Make the goals of the University real for your team.	Prioritise objectives; plan/allocate work fairly to make best use of resources.	Find and utilise the most cost/time efficient ways of doing things and achieving objectives.	Demonstrate a clear understanding of different customers and their real and perceived needs.	Understand the University's needs and priorities.	Win respect by taking the time to communicate effectively within your team and with colleagues in other teams/ departments.	Make time for your own development.	Ensure the team is focused on the priority issues.
Make it clear what you expect of individuals and your team and ensure staff understand why.	Discuss and agree your objectives and priorities with your Manager.	Consider the benefits/costs/risks of your actions and make constructive suggestions for reducing waste/ inefficiency or improving quality.	Manage customer expectations by keeping them well informed and explaining changes when they happen.	Identify opportunities for improvement and follow them through.	Liaise with stakeholders/ Senior Managers for their opinions/approval.	Be proactive – ask for what you need /want, selling the benefits to your Manager/Team.	Share ideas with other Team Leaders.
Treat all your Staff fairly and do what you say you will do.	Suggest improvements conflicting priorities and raise issues with your Manager when necessary.	Motivate team members to identify ideas for reducing waste/inefficiency or improving quality.	Ensure that your team understands service level statements and the importance of customer care in their role.	Encourage Staff to make suggestions for improvement and follow them up.	Explain the reasons for any changes and their relevance to Staff.	Give on the job coaching to individuals and the team.	Establish a network beyond your own team.
Welcome ideas and encourage team involvement in decisions.	Gather and assess information from a wide variety of sources and make the links for your team.	Encourage team members to take acceptable risks in pursuing innovation and to make and learn from mistakes.	Empower Staff to deliver good service, suggest improvements and solve customer problems.	Seek support from Management in developing new ideas.	Meet with Staff on a regular basis both on a one-to-one and team basis.	Take time to develop Staff beyond their current tasks.	Enable your team to understand the needs of others and the part they play in the University as a whole.

Examples of effective behaviours for team leaders/supervisors *contd.*

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Help Staff to understand the need for any change, why it is happening and how it will affect them.	Take responsibility for meeting the milestones/targets you have agreed and provide regular feedback on progress for your Manager and team.		Take responsibility for resolving customer problems referred to you.	Ensure the systems/processes you use do what they are meant to and add value.	Establish good working relationships using an effective network.	Demonstrate and share your knowledge/skills in how things can be done.	Openly appreciate team member contributions and give positive feedback.
Give constructive feedback, recognise success and celebrate achievements.	Regularly review progress/quality of work and make contingency plans when appropriate.		Be prepared to support your staff and the University and represent them professionally.		Follow through on promises and follow up on actions agreed.		Seek to understand the needs and motivations of your team members.

Examples of effective behaviours for managers

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Demonstrate your commitment to the University's Vision and Values in all your actions.	Agree your objectives and create a clear plan for your department which supports that of the University and looks to the future.	Confirm and understand budget requirements and monitor them throughout the year.	Identify your customers' current and future needs/expectations and plan to meet/exceed them.	Understand the purpose of the systems/processes you use.	Facilitate communication across teams/departments and act as an adviser.	Make the time for your own learning and development to meet professional standards.	Meet regularly with your own Supervisors/ Team Leaders and with your fellow Managers.
Show integrity, fairness and consistency in your dealings with all Staff and offer feedback, support and guidance when necessary.	Represent the University's plans and decisions constructively, selling the benefits in order to gain the trust and respect of Staff.	Help Staff to understand your budgets and encourage them to consider the commercial and financial implications of their work.	Seek feedback from customers and explain the outcomes to your staff.	Set standards for quality and ensure best practice.	Encourage a culture where effective communication is the norm.	Set SMART development objectives for yourself and your staff.	Network across teams to share knowledge and understanding.
Agree challenging, realistic objectives with Staff and ensure access to relevant resources.	Ensure your plan is effectively resourced and that work is allocated to individuals and teams fairly.	Identify opportunities for improvement/development by being aware of best practice across all sectors.	Ensure that Staff understand their priorities/responsibilities in relation to customer service.	Share ideas with colleagues to generate improvements for all.	Gain trust and influence by understanding the needs of others.	Identify and meet the training needs of your staff.	Actively encourage integration and co-operation between teams.
Set milestones, identify successes and achievements and recognise them at both team and individual level.	Regularly review your plan, recognise changes in circumstances promptly and adjust accordingly.	Develop effective policies and procedures to enable staff to meet all the necessary legal, regulatory, ethical and social requirements.	Encourage Staff to suggest ways of improving customer service and respond positively to their ideas.	Suggest improvements to the current way we do things and the systems/ processes we use.	Ensure key messages are communicated effectively at all levels.	Monitor Staff development by observing performance and giving constructive feedback.	Ensure that objectives are clearly understood and met by your teams.

Examples of effective behaviours for managers *contd.*

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Seek to understand the nature and cause of performance issues and manage them constructively.	Set targets/ milestones and monitor progress/ quality of work against them.	Seek the highest level of quality and cost effectiveness.	Ensure that you and your staff model behaviour that shows respect, helpfulness and co-operation.	Willingly share knowledge, information and access with others as needed.	Anticipate others reactions to what you have to say by understanding the needs of the audience and taking their views into account.	Seek regular feedback on your performance from those who will provide it honestly and objectively and act on it.	Show integrity, fairness and consistency in relation to the team/ individuals you manage.
Make change work in your department and do what you say you will do.				Encourage and support Staff in identifying ways to improve things.			

Examples of effective behaviours for top managers

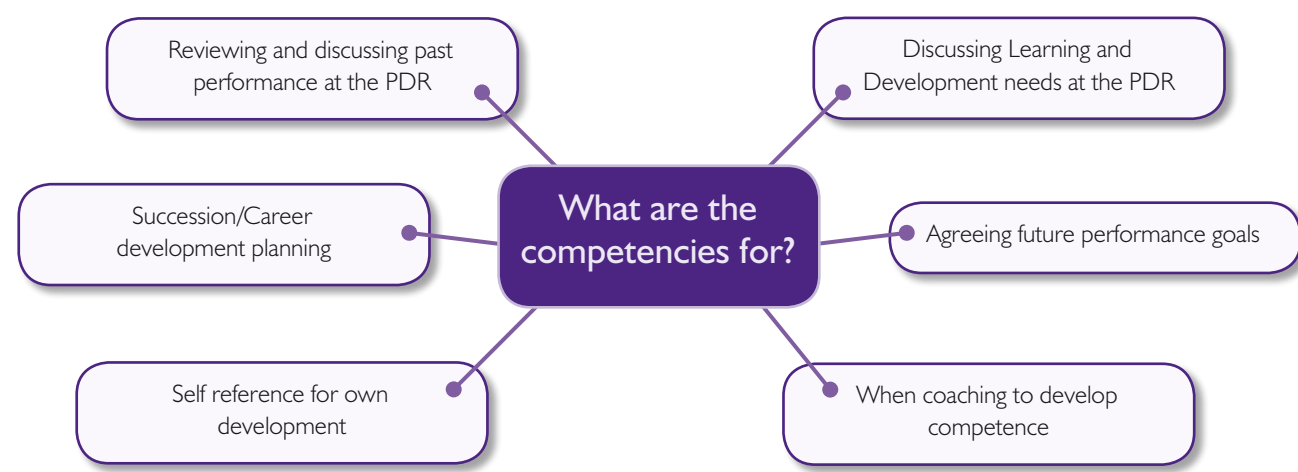
Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Promote a shared Vision and inspire a sense of purpose throughout the University.	Scan the environment for information on customers, competitors and issues and use the information gained to support future planning and decision making for the University.	Anticipate likely future scenarios based on analysis of trends and developments across all sectors.	Nurture relationships with a range of contacts in stakeholder organisations.	Encourage Staff to regularly suggest improvements to the established way of doing things.	Use clear, simple, inspirational and authoritative messages.	Act as a role model for Staff.	Set good examples of respect, helpfulness and co-operation.
Clearly communicate objectives which support the Vision and Values.	Identify and prioritise strategic objectives that are consistent with the Vision and Values.	Ensure timely submission of proposals/bids/ applications and seek regular updates on progress.	Regularly meet with key stakeholders/ customers in order to understand and respond to their needs.	Meet with peers to review current work methods, systems/ processes.	Promote the need for regular communication at all levels to ensure understanding.	Encourage and support Staff to make use of the learning and development opportunities available to them.	Ensure the top team operate across all functions.
Recognise and celebrate the success of Staff and encourage them to learn from their failures.	Create a sense of common purpose by developing policies and systems that guide the work of others towards achieving your objectives.	Foster a culture of improving quality and efficiency by benchmarking and applying best practice.	Monitor and assess the strengths, weaknesses, opportunities and threats of the services you provide and current and future developments in your sector, including competitors' activities.	Ensure that current methods, systems/ processes support the University's objectives and reflect best practice.	Take time to communicate, be authentic, develop trust and openness	Understand the future talent needs of the University and plan to meet them.	Demonstrate and encourage collaboration and co-operation at the highest level.

Examples of effective behaviours for top managers *could*.

Leadership and motivation	Planning and organising	Commercial awareness	Customer focus	Continuous improvement	Communicating and influencing	The ability to develop yourself and others	Teamwork and collaboration
Lead by example, set and promote the key values across teams.	Balance risks and resourcing requirements with desired outcomes.	Identify ideas for new products/services or improvements and respond enthusiastically to suggestions, providing feedback and ensuring that good ideas receive support and backing.	Measure the level of customer satisfaction being achieved, benchmarking where appropriate.	Integrate systems and processes to avoid duplication of effort.	Anticipate others reactions to what you have to say and plan for a positive outcome.	Share your learning with your peers and your Managers as appropriate.	Facilitate liaison within and between all teams and departments.
Involve all Managers and encourage them to take responsibility for their area of work.	Delegate responsibility for achieving objectives, allocate resources effectively and hold Staff accountable.	Establish a culture which encourages Staff to take acceptable risks and to learn from mistakes.	Identify and assess opportunities to expand into new markets to meet/exceed customers' needs.	Anticipate future trends and develop processes to meet them.	Use a range of strategies to influence others and win their support.	Identify potential skills shortage areas and develop resourcing plans to address them.	Identify and facilitate the resolution of issues across teams/departments.
Show sensitivity to stakeholders' needs and interests and manage them effectively.	Identify milestones/metrics/methods for monitoring, evaluating and improving performance.	Ensure that colleagues/staff understand the importance of assessing the commercial implications of their actions/ideas.	Advocate customer focus by modelling behaviour that shows respect, helpfulness and co-operation.	Ensure that everything we do is customer focused.	Maintain an effective network both inside and outside the University.	Encourage Staff to learn from mistakes and help them to identify ways to improve.	Ensure the Vision is understood and shared by all.
Apply a range of motivational techniques.							

How to use the competencies

What are the competencies for?



The competencies can be used as an aid to a variety of discussions about performance and improvement. During the 6 monthly PDR review, the examples of behaviour can be used as a tool to aid the discussion about an individual's strengths. They can be used to identify gaps in performance or improvements that are required.

The examples given are not exhaustive and should only be used as reference. The competencies are a focus for any discussion about performance and should be used as a prompt rather than the sole element of the discussion.

Use in PDRs

Asking the right questions about work

How the competencies are used will depend on the circumstances. However people may wish to use the following questions as a useful approach – prefixing them to any of the examples of behaviour at any level:

- How often do you...?
- How do you...?
- When have you...?
- Tell me about a time when you...?
- What examples do you have of your ability to...?

The ability to link the statements to real work situations using real examples will be acquired through practice and Staff need to begin to use the competencies as part of their daily work for them to be fully embraced. People talking about their work are inevitably talking about their competence.

It is important to understand that the competencies are differentiated under eight headings for convenience only, no section has value in isolation from the other seven and they are all relevant to all employees. Whilst every effort has been made to avoid duplication, some overlap is unavoidable.

The PDR forms and guidance notes

What's changed

1. The competencies checklist

The checklist now contains seven boxes to enable greater choice for the degree of competency shown by the reviewee – from “rarely” to “consistently”. Note that the degree of competency is determined by the reviewee looking at the description of the competency and how regularly the reviewee displays the appropriate effective behaviours for his/her level (ie staff, supervisor/team leader, manager, top manager), in the appropriate circumstances.

2. Creating your Personal Development Plan – Stage 2

An additional section has been added enabling reviewees to plan, in negotiation with their line manager, development activities to meet needs arising from their review of the eight competencies. This is to help pin down activities which otherwise might not get recorded and therefore forgotten.

3. Other development needs

This last section is to capture, in a structured fashion, plans to meet other developmental needs such as technical, IT, specialist, legal, mandatory that are part of a reviewee's job.

4. Additional notes

There are additional forms that can be used to record comments against each competency should the reviewee wish to and reviewer wish to record notes as an aide memoire during the review. Agreed notes can then be transferred to the PDR form at the end of the review if required.

5. The PDR guidance notes

These have been enhanced to take into account the changes explained above, with a process flowchart and PDR meeting checklist also now included.

PDR guidance notes

About the form

The PDR form is split into a number of parts:

1. Part A Taking stock

This is a chance to reflect on your performance against the objectives agreed previously in the last review's Part B. Reviewees can complete this in advance of the review in preparation for the discussion during the review. The reviewer can comment as appropriate on the reviewees interpretation of their performance.

2. Part B Planning ahead

This part is used to set SMART objectives for the coming year. It should be completed during the review, although some forward planning about objectives for discussion during the review would help the process. Make rough notes and take them along as prompts with you to the review.

3. Part C Looking back – sections 1 and 2

These two sections allow you to reflect on the success of your Personal Development Plan (PDP) you created at your last review. Has it helped you in your job and if so how? Was the development and support appropriate? What else if anything now needs to happen and if so what can be done to help and by whom?

4. Part C Looking forward – section 3

This section provides you with an opportunity to say how you think you are doing in your job. Try to be honest with rating yourself against the 8 competencies.

5. Part C Looking forward – section 4

This section provides a quick and easy template for you to agree development activities against the competencies, arising from the discussion around the ratings in section 3. Note that you will probably not have development activities for all of the competencies; maybe just one or two at each review.

6. Part C Looking forward – section 5

This section provides a simple template for you to capture and plan any other development needs for your job (eg. technical or specialist needs).

7. Final page – additional comments and signatures

Please comment if you wish about the process of the PDR system, use of forms etc. IF both reviewer and reviewee are happy about the content and accuracy of the completed form then both parties must sign and date.

PDR reviewer and reviewee skills

For a range of resources to support you in conducting successful reviews please go to the relevant section on the PDP Support Centre.

New reviewers

Please contact your Learning and Development Co-ordinator (www.exeter.ac.uk/learninganddevelopment/coordinators) or Staff Learning and Development for help.

PDR timing and emphasis

The PDR cycle has been divided into two 6 monthly periods:

June PDR

The emphasis on the June review will be placed on Part A – reviewing achievements over the last year (please note that reviewees must complete this if they wish to be considered for a Merit Award) and part B to agree plans for the coming year by setting SMART objectives.

January PDR

The emphasis on the January review will be place on a self-assessment exercise and subsequent discussion during the review based on the competencies and associated behaviours (see the guide for managers and staff). A PDP will be agreed, drawn up and reviewed when appropriate.

Self assessment: how to use

This scheme is designed to be flexible and user friendly, and to improve the way we look at learning and development needs for all of our staff. Although we have offered guidance on when this form should be used, this is a minimum requirement.

The form can be used more frequently, when required, as a way of identifying core learning needs and, importantly, should meet the needs of the situation, for example as part of the induction process for new members of staff or staff new to role. Line managers may also choose to review this on a more regular basis, during 1:1 meetings with team members, for example.

Self assessment process – you complete the form

Two weeks before your January Review you will hand your reviewer a copy of your form. This requires you to complete a self assessment against each of the 8 competencies at the level appropriate to your job (see guidance notes) (this is a requirement for the January review, but may also be repeated at the June review). The guidance on the competencies provides an explanation of what the competencies mean for staff, supervisors/team leaders, managers and top managers.

You should allow sufficient time to undertake this, and answer in an honest and open way, as the information gleaned is designed to be used to help you with your professional development, enhancing your skills to help you become more effective in your role.

You should tick the score that you most agree with, and may also consider, where appropriate, what the priorities are for you. Generally though, the competencies are 'core' and therefore linked, and will be appropriate in a lesser or greater way for all staff. We have our own specialist areas, not included here for obvious reasons, but the competencies are the skills and behaviours that we agree we all have in common. There is a separate space for technical and specialist development needs.

This exercise is designed to be a simple self assessment of what you think your capabilities are against each of the competencies, and the purpose for completing this is to help you and your line manager agree a PDP for you using this system.

Line manager considers the form

Your line manager will consider what you have said about yourself on the form and he/she will create an agenda for discussion at the review using this information. They may not agree with all the things you have said, and in some cases this means that they think you are stronger in some areas than you claim, and in others in need of more support than you claim. Any difference of opinion should not be seen as negative or a chance to criticise, but as a positive opportunity to have an honest and open discussion about your personal development.

At the review

When you come to discuss the self-assessment at the review you should consider any observations that you have made and be prepared to discuss your future development, progress or both. Where you have identified and agreed a prioritised development need you will then be able to plan how to action this and by when.

Your discussions with your line manager should centre on the approach you take and when it will be reviewed. Any notes can be made in the Line Manager's Comments box alongside the 8 competencies, and more detail provided on the Personal Development Plan Stage 2 form. Any additional notes should be on a blank sheet of paper and attached.

After the review

The University of Exeter PDP (Personal Development Plans) Support Centre

This virtual learning environment has been set up to provide you with support before, during and after completion of your Personal Development Review (PDR) and to provide you with access to learning resources to fulfil your Personal Development Plan (PDP).

For professional services staff, it will also give you support with the new 'competencies' that we have introduced. Your proficiency against these competencies will be reviewed in line with the Investors in People Standard (IIP) programme that we have achieved and continue to develop with and work on.

Managers can use this toolkit to help you with your day-to-day activities, to support personal development and to work with your team to improved effectiveness and performance. Your PDP toolkit contains essential management and other topics where you will find resources to address particular needs. Each need has a range of resources – 'Knowing' resources develop your understanding and 'Doing' documents are practical tools for you and your team.

Using the PDP Support Centre to enhance your professional development

Once you have agreed your PDP with your line manager your first point of contact will be the front page where the competencies are mapped to the relevant resources. You will be able to find information, case study materials, examples of best practice, exercises etc. You will also find links to other resources eg Exeter's Learning and Development website with all our programmes, external resources etc.

Work through the materials as best you can. You may find this sufficient to provide all the help you need, or you may find you need further support, in which case you can contact the appropriate provider at the university if it is a course or advice that you need, or talk to your line manager about advice, guidance, mentoring or coaching if you feel that the solution lies there.

The PDP Support Centre can be used at any time and does not rely on the PDR process and the use of the competencies alone. If you have a particular learning need you can use the search facility provided for a quick response.

For any further advice or information please contact SLD. Remember, the PDP support centre is only the place to start, there is plenty of help available through all of our internal Learning and Development providers.

PDR meeting checklist

Things to bring to the review meeting:

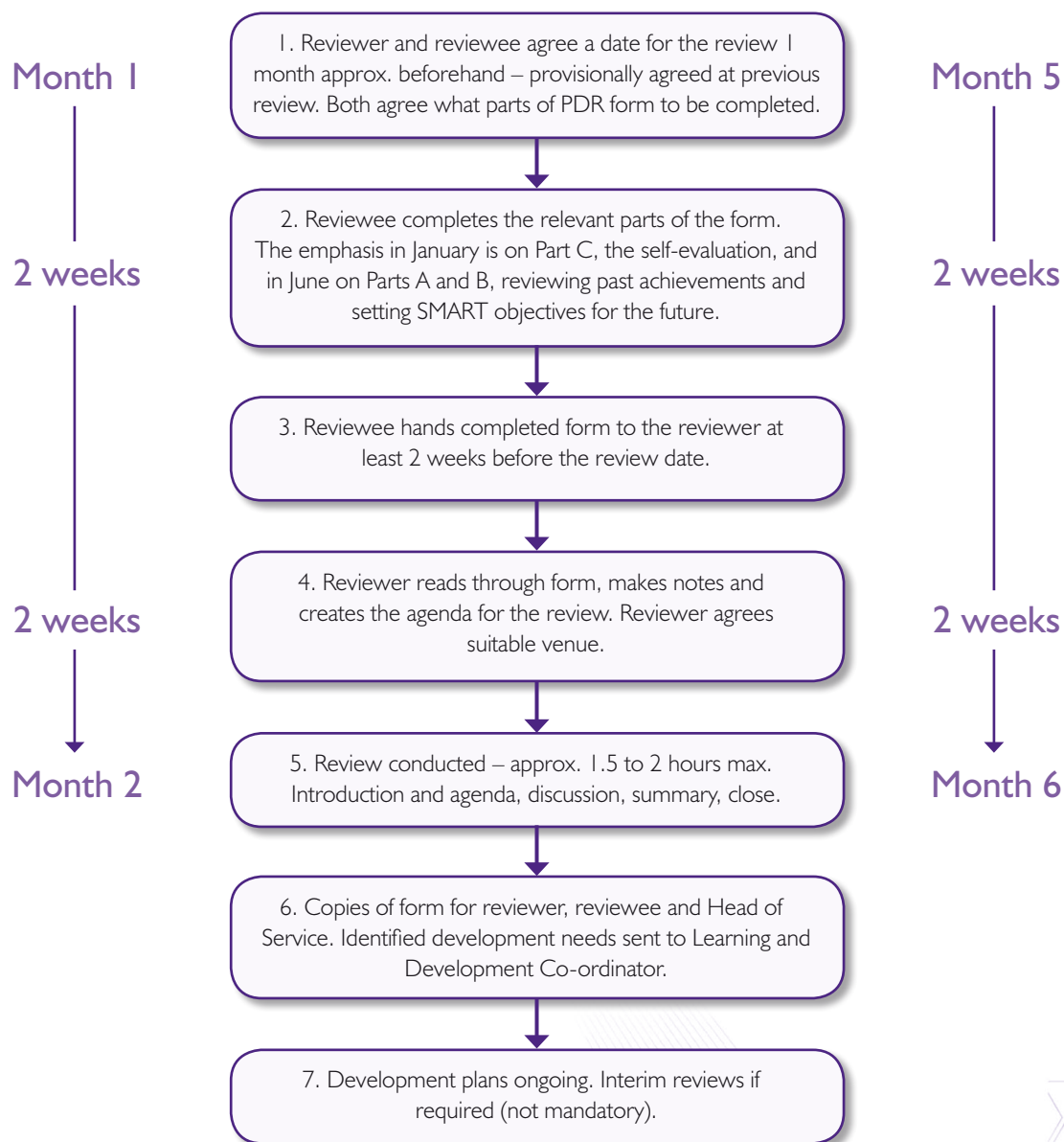
Reviewer

- Copy of reviewees completed form and any notes
- Competencies (if reviewing) with behaviours for agreed level
- Diary to arrange next review and any other follow-up/ interim reviews/1:1s
- Course/staff development information you wish to discuss
- Reviewees previous PDR (relevant section)

Reviewee

- Copy of completed form
- Any notes in preparation for the meeting
- Up to date job description
- Diary to agree next review/1:1s
- Course/staff development information you wish to discuss
- Previous PDR (relevant section)

12 month professional services PDR process flow chart



Professional services review form

Six monthly Performance and Development Reviews (PDRs)	The stages of the review process	Your details
<p>For full information and advice on this scheme please visit www.exeter.ac.uk/learninganddevelopment</p> <p>Your Review Meetings need careful preparation, and this form is designed to help that process.</p> <p>It is in three parts and will be conducted over two separate meetings, 6 months apart:</p> <p>June review</p> <p>The emphasis will be placed on</p> <p>Part A: Taking stock – to review achievements over the past year (please note that this part must be completed if you wish to be considered for a Merit reward), <i>and also</i></p> <p>Part B: Planning ahead – to agree plans for the next year.</p> <p>January review</p> <p>The emphasis will be placed on the use of the Exeter University competencies framework to develop a Personal Development Plan.</p> <p>Part C: Personal Development Plan – to reflect on previous development activities and plan for meeting development needs.</p>	<p>The conversation with your Reviewer is at the heart of the process; the form serves as a record of the 2 meetings. You may find the following checklist helpful:</p> <p><input type="checkbox"/> Your Reviewer will contact you to arrange a meeting.</p> <p><input type="checkbox"/> Prepare the relevant parts of the form for the January or June Review – agree which parts with your reviewer.</p> <p><input type="checkbox"/> Pass the form to your Reviewer two week before the meeting.</p> <p><input type="checkbox"/> Ensure that the outcomes of the discussion are recorded and that you and the Reviewer have signed the form.</p> <p><input type="checkbox"/> A copy of the form should be passed to your Head of Service.</p>	<p>Name:</p> <p>Job title:</p> <p>Service/Unit:</p> <p>Period covered by January review (i.e. previous 6 months):</p> <p>From: To:</p> <p>Period covered by June review (i.e. previous 12 months):</p> <p>From: To:</p> <p>Date started this post:</p> <p>Date of previous review:</p> <p>Previous reviewer's name:</p> <p>Current reviewer's name:</p>

Part A: Taking stock

You can draft this before the June Performance Review and revise it afterwards.

Summarise the main objectives agreed last year (Based on last year's form)	Achievements (Self assessment) (What happened? Successes, personal achievements, plus notes on any difficulties and changes)	Reviewer's comments

Part C: Personal Development Plan



To be discussed and completed during your January Personal Development review.

Looking back – meeting and supporting your professional development needs

1. Refer to your previous PDR Part C form. Have you received the appropriate development and support over the last 12 months and how has it helped you to become more effective in your role?

2. What else could be done to support you? (Eg more/additional development, help from line manager/team/other)

Reviewee:

Part C:

To be completed and handed to your reviewer 2 weeks in advance of your January Personal Development Review.

Looking forward – creating your Personal Development Plan – Stage 1 self assessment

3. This section provides you with an opportunity to say how you think you are doing in your job. Try to be honest with rating yourself against the 8 competencies and make comments against any areas that you would like to discuss during your review. (Please refer to hardcopy or guidance notes on the Staff Learning and Development web site at www.exeter.ac.uk/learninganddevelopment/pdr)

Competency	Rarely Demonstrates	Sometimes Demonstrates	Often Demonstrates	Consistently Demonstrates	Reviewer's comments	Line Manager's Comments
1. Leadership and motivation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2. Planning and organising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3. Commercial awareness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4. Customer focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
5. Continuous improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
6. Communicating and influencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
7. The ability to develop yourself and others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
8. Teamwork and collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Reviewer:

Part C:



Looking forward – creating your Personal Development Plan – Stage 2. Summary against competencies

4. After the review: Using the Personal Development Plan forms please complete each section and where appropriate try to commit to any agreed development activities. Remember to use the PDP support centre (www.exeter.ac.uk/learninganddevelopment/pdr/pdp_resource) as your first point of reference. (Please note the PDP support centre must be accessed via the Learning and Development website, the URL shown on the PDP pages will not work if used directly, due to password protections on our website).

Competency	Desired outcome	Agreed development activity	Target date
1. Leadership and motivation			
2. Planning and organising			
3. Commercial awareness			
4. Customer focus			
5. Continuous improvement			
6. Communicating and influencing			
7. The ability to develop yourself and others			
8. Teamwork and collaboration			

Reviewee:

Part C:

Other development needs

Please complete your plan by listing any other development activities that will help with your job/career (technical, legal, specialist, etc).

Identified need	Desired outcome	Agreed development activity	Target date

Reviewee:

Your additional comments

You can use this space to make any comments about the Performance and Development Review process or the outcomes.

Date for next Review:

Signatures

Your name (PRINT):

Your signature:

Date:

Reviewers name (PRINT):

Reviewers signature:

Date:

Head of Service/Head of Section signature:



Additional notes

Examples of effective behaviour for staff

To be used as prompts as part of the January PDR (not mandatory)

Leadership and motivation

- Take pride in and responsibility for getting the job done.
- Offer help and support to others when appropriate.
- Keep going despite set backs or suggest improvements.
- Do what you say you will do.
- Have a positive attitude to the teams' goals.

Reviewee comments:

Reviewer comments:

Planning and organising

- Understand your own priorities/responsibilities and those of your team.
- Co-ordinate your activities with your Supervisors/Team Leaders or colleagues as necessary.
- Manage your own workload and priorities effectively and efficiently.
- Ask for guidance, help or support when you need it.
- Be prepared to work on your own initiative and think things through.

Reviewee comments:

Reviewer comments:

Commercial awareness

- Be aware of the commercial/financial implications of your own actions.
- Act within the limits of your authority and seek guidance when you need it.
- Find practical ways to overcome obstacles or barriers to your success.
- Raise any ideas for improvements to services, products or efficiency.
- Be vigilant for possible risks and hazards.
- Strive to reduce waste and improve quality in your work.

Reviewee comments:

Reviewer comments:

Customer focus

- Understand who your customers are.
- Maintain the image of the University by making sure that your appearance and behaviour are professional at all times.
- Identify and anticipate customers' needs and do all you can to meet/exceed them.
- Promote the University's facilities, services, products and image at all times and provide feedback to your Team Leader when you observe the needs of customers changing.
- Acknowledge dissatisfied customers immediately, attend to them without delay and pass their comments to your Supervisor/Team Leader if appropriate.

Reviewee comments:

Reviewer comments:

Continuous improvement

- Look for better ways of doing things and suggest improvements.
- Understand how systems/processes work and why they are done that way.
- Use systems/processes effectively.
- Understand the effect of one system/process on another and the importance of sharing the information.
- Identify where there is inefficiency or waste in a system/process.

Reviewee comments:

Reviewer comments:

Communicating and influencing

- Be constructive and positive in what you have to say.
- Do what you say you will do.
- Be involved at meetings, ask questions, listen and give information when appropriate.
- Give positive recognition/feedback to others.
- Use the appropriate method for communication, email/ phone/face-to-face, to get information from others and follow up as necessary.
- Understand the need for clarity in all your communication.

Reviewee comments:

Reviewer comments:

The ability to develop yourself and others

- Identify what learning and development you need to do your job effectively.
- Be flexible and willing to adapt and learn.
- Participate fully in your Personal Development Review and agree targets for your own development.
- Seek and respond well to feedback from your Team Leader, peers and customers.
- Help others to learn new skills and share information with others when necessary.

Reviewee comments:

Reviewer comments:

Teamwork and collaboration

- Understand what others do and their roles.
- Ask for help when you need it.
- Consider how your actions affect the work/plans of others.
- Value the contributions of others.
- Show pride in your team and the contribution it makes.

Reviewee comments:

Reviewer comments:



Additional notes

Examples of effective behaviour for team leaders/supervisors

To be used as prompts as part of the January PDR (not mandatory)

Leadership and motivation

- Make the goals of the University real for your team.
- Make it clear what you expect of individuals and your team and ensure staff understand why.
- Treat all your staff fairly and do what you say you will do.
- Welcome ideas and encourage team involvement in decisions.
- Help staff to understand the need for any change, why it is happening and how it will affect them.
- Give constructive feedback, recognise success and celebrate achievements.

Reviewee comments:

Reviewer comments:

Planning and organising

- Prioritise objectives; plan/allocate work fairly to make best use of resources.
- Discuss and agree your objectives and priorities with your Manager.
- Suggest improvements conflicting priorities and raise issues with your Manager when necessary.
- Gather and assess information from a wide variety of sources and make the links for your team.
- Take responsibility for meeting the milestones/targets you have agreed and provide regular feedback on progress for your Manager and team.
- Regularly review progress/quality of work and make contingency plans when appropriate.

Reviewee comments:

Reviewer comments:

Commercial awareness

- Find and utilise the most cost/time efficient ways of doing things and achieving objectives.
- Consider the benefits/costs/risks of your actions and make constructive suggestions for reducing waste/inefficiency or improving quality.
- Motivate team members to identify ideas for reducing waste/inefficiency or improving quality.
- Encourage team members to take acceptable risks in pursuing innovation and to make and learn from mistakes.

Reviewee comments:

Reviewer comments:

Customer focus

- Demonstrate a clear understanding of different customers and their real and perceived needs.
- Manage customer expectations by keeping them well informed and explaining changes when they happen.
- Ensure that your team understands service level statements and the importance of customer care in their role.
- Empower Staff to deliver good service, suggest improvements and solve customer problems.
- Take responsibility for resolving customer problems referred to you.
- Be prepared to support your staff and the University and represent them professionally.

Reviewee comments:

Reviewer comments:

Continuous improvement

- Understand the University's needs and priorities.
- Identify opportunities for improvement and follow them through.
- Encourage staff to make suggestions for improvement and follow them up.
- Seek support from Management in developing new ideas.
- Ensure the systems/processes you use do what they are meant to and add value.

Reviewee comments:

Reviewer comments:

Communicating and influencing

- Win respect by taking the time to communicate effectively within your team and with colleagues in other teams/ departments.
- Liaise with stakeholders/Senior Managers for their opinions/ approval.
- Explain the reasons for any changes and their relevance to staff.
- Meet with staff on a regular basis both on a one-to-one and team basis.
- Establish good working relationships using an effective network.
- Follow through on promises and follow up on actions agreed.

Reviewee comments:

Reviewer comments:

The ability to develop yourself and others

- Make time for your own development.
- Be proactive – ask for what you need/want, selling the benefits to your Manager/Team.
- Give on the job coaching to individuals and the team.
- Take time to develop staff beyond their current tasks.
- Demonstrate and share your knowledge/skills in how things can be done.

Reviewee comments:

Reviewer comments:

Teamwork and collaboration

- Ensure the team is focused on the priority issues.
- Share ideas with other team leaders.
- Establish a network beyond your own team.
- Enable your team to understand the needs of others and the part they play in the University as a whole.
- Openly appreciate team member contributions and give positive feedback.
- Seek to understand the needs and motivations of your team members.

Reviewee comments:

Reviewer comments:



Additional notes

Examples of effective behaviour for managers

To be used as prompts as part of the January PDR (not mandatory)

Leadership and motivation

- Demonstrate your commitment to the University's Vision and Values in all your actions.
- Show integrity, fairness and consistency in your dealings with all staff and offer feedback, support and guidance when necessary.
- Agree challenging, realistic objectives with staff and ensure access to relevant resources.
- Set milestones, identify successes and achievements and recognise them at both team and individual level.
- Seek to understand the nature and cause of performance issues and manage them constructively.
- Make change work in your department and do what you say you will do.

Reviewee comments:

Reviewer comments:

Planning and organising

- Agree your objectives and create a clear plan for your department which supports that of the University and looks to the future.
- Represent the University's plans and decisions constructively, selling the benefits in order to gain the trust and respect of staff.
- Ensure your plan is effectively resourced and that work is allocated to individuals and teams fairly.
- Regularly review your plan, recognise changes in circumstances promptly and adjust accordingly.
- Set targets/milestones and monitor progress/quality of work against them.

Reviewee comments:

Reviewer comments:

Commercial awareness

- Confirm and understand budget requirements and monitor them throughout the year.
- Help staff to understand your budgets and encourage them to consider the commercial and financial implications of their work.
- Identify opportunities for improvement/development by being aware of best practice across all sectors.
- Develop effective policies and procedures to enable staff to meet all the necessary legal, regulatory, ethical and social requirements.
- Seek the highest level of quality and cost effectiveness.

Reviewee comments:

Reviewer comments:

Customer focus

- Identify your customers' current and future needs/expectations and plan to meet/exceed them.
- Encourage staff to suggest ways of improving customer service and respond positively to their ideas.
- Seek feedback from customers and explain the outcomes to your staff.
- Ensure that you and your staff model behaviour that shows respect, helpfulness and co-operation.
- Ensure that staff understand their priorities/responsibilities in relation to customer service.

Reviewee comments:

Reviewer comments:

Continuous improvement

- Understand the purpose of the systems/processes you use.
- Set standards for quality and ensure best practice.
- Share ideas with colleagues to generate improvements for all.
- Suggest improvements to the current way we do things and the systems/processes we use.
- Willingly share knowledge, information and access with others as needed.
- Encourage and support staff in identifying ways to improve things.

Reviewee comments:

Reviewer comments:

Communicating and influencing

- Facilitate communication across teams/departments and act as an adviser.
- Encourage a culture where effective communication is the norm.
- Gain trust and influence by understanding the needs of others.
- Ensure key messages are communicated effectively at all levels.
- Anticipate others reactions to what you have to say by understanding the needs of the audience and taking their views into account.

Reviewee comments:

Reviewer comments:

The ability to develop yourself and others

- Make the time for your own learning and development to meet professional standards.
- Set SMART development objectives for yourself and your staff.
- Identify and meet the training needs of your staff.
- Monitor staff development by observing performance and giving constructive feedback.
- Seek regular feedback on your performance from those who will provide it honestly and objectively and act on it.

Reviewee comments:

Reviewer comments:

Teamwork and collaboration

- Meet regularly with your own Supervisors/Team Leaders and with your fellow Managers.
- Network across teams to share knowledge and understanding.
- Actively encourage integration and co-operation between teams.
- Ensure that objectives are clearly understood and met by your teams.
- Show integrity, fairness and consistency in relation to the team/individuals you manage.

Reviewee comments:

Reviewer comments:



Additional notes

Examples of effective behaviour for top managers

To be used as prompts as part of the January PDR (not mandatory)

Leadership and motivation

- Promote a shared Vision and inspire a sense of purpose throughout the University.
- Clearly communicate objectives which support the Vision and Values.
- Recognise and celebrate the success of staff and encourage them to learn from their failures.
- Lead by example, set and promote the key values across teams.
- Involve all Managers and encourage them to take responsibility for their area of work.
- Show sensitivity to stakeholders' needs and interests and manage them effectively.
- Apply a range of motivational techniques.

Reviewee comments:

Reviewer comments:

Planning and organising

- Scan the environment for information on customers, competitors and issues and use the information gained to support future planning and decision making for the University.
- Identify and prioritise strategic objectives that are consistent with the Vision and Values.
- Create a sense of common purpose by developing policies and systems that guide the work of others towards achieving your objectives.
- Balance risks and resourcing requirements with desired outcomes.
- Delegate responsibility for achieving objectives, allocate resources effectively and hold staff accountable.
- Identify milestones/metrics/methods for monitoring, evaluating and improving performance.

Reviewee comments:

Reviewer comments:

Commercial awareness

- Anticipate likely future scenarios based on analysis of trends and developments across all sectors.
- Ensure timely submission of proposals/bids/applications and seek regular updates on progress.
- Foster a culture of improving quality and efficiency by benchmarking and applying best practice.
- Identify ideas for new products/services or improvements and respond enthusiastically to suggestions, providing feedback and ensuring that good ideas receive support and backing.
- Establish a culture which encourages Staff to take acceptable risks and to learn from mistakes.
- Ensure that colleagues/staff understand the importance of assessing the commercial implications of their actions/ideas.

Reviewee comments:

Reviewer comments:

Customer focus

- Nurture relationships with a range of contacts in stakeholder organisations.
- Regularly meet with key stakeholders/customers in order to understand and respond to their needs.
- Monitor and assess the strengths, weaknesses, opportunities and threats of the services you provide and current and future developments in your sector, including competitors' activities.
- Measure the level of customer satisfaction being achieved, benchmarking where appropriate.
- Identify and assess opportunities to expand into new markets to meet/exceed customers' needs.
- Advocate customer focus by modelling behaviour that shows respect, helpfulness and co-operation.

Reviewee comments:

Reviewer comments:

Continuous improvement

- Encourage staff to regularly suggest improvements to the established way of doing things.
- Meet with peers to review current work methods, systems/processes.
- Ensure that current methods, systems/processes support the University's objectives and reflect best practice.
- Integrate systems and processes to avoid duplication of effort.
- Anticipate future trends and develop processes to meet them.
- Ensure that everything we do is customer focused.

Reviewee comments:

Reviewer comments:

Communicating and influencing

- Use clear, simple, inspirational and authoritative messages.
- Promote the need for regular communication at all levels to ensure understanding.
- Take time to communicate, be authentic, develop trust and openness
- Anticipate others reactions to what you have to say and plan for a positive outcome.
- Use a range of strategies to influence others and win their support.
- Maintain an effective network both inside and outside the University.

Reviewee comments:

Reviewer comments:

The ability to develop yourself and others

- Act as a role model for staff.
- Encourage and support staff to make use of the learning and development opportunities available to them.
- Understand the future talent needs of the University and plan to meet them.
- Share your learning with your peers and your Managers as appropriate.
- Identify potential skills shortage areas and develop resourcing plans to address them.
- Encourage staff to learn from mistakes and help them to identify ways to improve.

Reviewee comments:

Reviewer comments:

Teamwork and collaboration

- Set good examples of respect, helpfulness and co-operation.
- Ensure the top team operate across all functions.
- Demonstrate and encourage collaboration and co-operation at the highest level.
- Facilitate liaison within and between all teams and departments.
- Identify and facilitate the resolution of issues across teams/ departments.
- Ensure the Vision is understood and shared by all.

Reviewee comments:

Reviewer comments:

Learning resources: a professional's toolkit

Introduction

The Toolkit consists of the following topics:

- The PDP Support Centre
- Learning Styles
- Mapping the competencies to:
 - key University documents
 - the liP standard
 - National Occupational Standards (NOS) for management and Professional Development opportunities
- HERA

The PDP Support Centre

The Personal Development Planning Support Centre is a website developed to host a vast range of learning resources.

This virtual learning environment has been set up to provide staff with support before, during and after completion of their Personal Development Review (PDR) and to provide you with access to learning resources to fulfil your Personal Development Plan (PDP).

The PDP Support Centre will provide you with the opportunity to learn, practice and develop management and professional theories, skills and techniques. It will give access to:

- details of the new Professional Service competency framework
- PDR and PDP administration
- reviewer support
- reviewee support
- information on the liP standard
- links to other PDP activity resources, including course booking
- a comprehensive toolkit to support achievement of your PDP objectives

This toolkit can be used to help all staff with their day-to-day activities, to support personal development and to work within

teams to improve effectiveness and performance. Each of the management topics within the PDP Support Centre is divided into sections to address a range of needs. Under each need you will find:

- Knowing resources to help you develop your understanding
- Doing resources to help you put your understanding into practice

The competencies can be seen on the home page which is accessible via the Learning and Development website at:

www.exeter.ac.uk/learninganddevelopment/pdr/pdp_resource

(Please note the PDP support centre must be accessed via the Learning and Development website, the URL shown on the PDP pages will not work if used directly, due to password protections on our website).

The competencies are mapped to the available resources, for example 'The ability to develop yourself and others' has the following major learning resource categories mapped to it, which are:

1. Developing people
2. Performance management
3. Personal performance

Learning styles

Introduction

Development should be the joint responsibility of an individual and their line Manager with support from relevant specialists. Having used the competencies as part of the PDR to establish development needs you should consider the best way of taking what has been identified and agreed forward. The focus groups explored issues around learning styles and preferences, the outcomes of which can be found on the table below.

There is no doubt that different people have different learning styles. Having a variety of techniques/resources available will make it easier for individuals to choose the one which is best suited to their needs and circumstances. During the focus

groups, participants identified a variety of ways that they could learn and develop competence.

Each of us tends to have a particular style of learning which suits us, often because we have found it has worked well in the past. Whilst it is important to know preferences, it is also important to recognise types of activities which may be more uncomfortable for individuals to learn from. Part of personal growth and development may well involve identifying an individual's preferred learning style. By encouraging individuals to choose different styles of learning, this should extend Staff's behaviours into approaches they may have not previously used.

Honey and Mumford, based on Kolb's learning cycle, indicate that learning styles fall into 4 categories.

Outcomes of focus groups – development activities for different learning styles

Learning style	Learn best from	Learn less from	Preferred development activities
Activist	<p>Being thrown in to a task that is challenging.</p> <p>Engrossing yourself in short here and now activities.</p> <p>Excitement, drama crisis.</p>	<p>Taking a passive role.</p> <p>Assimilating, analysing and interpreting data.</p> <p>Engaging in solitary work or learning.</p>	<p>Teamwork tasks.</p> <p>Role playing exercises.</p> <p>Business games/simulations.</p> <p>Giving presentations.</p> <p>Chairing meetings.</p> <p>Leading discussions.</p> <p>Taking part in courses/workshops.</p> <p>On-job coaching.</p> <p>New/additional responsibilities.</p> <p>Discussions about best practice.</p> <p>Networking.</p> <p>Focus groups.</p> <p>Discussions about the competencies.</p>
Reflector	<p>Standing back from events.</p> <p>Offering analysis and observation.</p> <p>Thinking before acting.</p>	<p>Being forced into the limelight.</p> <p>Being rushed from one activity to another.</p> <p>Acting without planning.</p>	<p>Listening to and observing others.</p> <p>Watching film/video.</p> <p>Reading.</p> <p>Shadowing.</p> <p>Computer-based training.</p> <p>Investigating and assembling information.</p> <p>Producing analysis and reports.</p> <p>Learning from feedback/coaching.</p> <p>Discussions about the competencies.</p>
Theorist	<p>Models, systems, theories.</p> <p>Ideas and concepts that are challenging.</p> <p>Opportunities to question and probe.</p>	<p>Activities involving uncertainty and ambiguity.</p> <p>Situations emphasising emotions and feelings.</p> <p>Acting without a basis in policy/principle.</p>	<p>Teaching others through question and answer sessions.</p> <p>Listening.</p> <p>Reading.</p> <p>Watching videos.</p> <p>Computer-based training.</p> <p>Mentoring others.</p> <p>Receiving feedback/coaching.</p> <p>Studying a topic/researching.</p>
Pragmatist	<p>Activities which link theory with the ability to practice.</p> <p>Seeing others do something.</p> <p>Immediate opportunities to implement what they have learned.</p>	<p>Events not related to immediate need.</p> <p>Activities that have no apparent outcome.</p> <p>Others who are distant from "reality".</p>	<p>Work related tasks.</p> <p>Projects.</p> <p>Shadowing.</p> <p>Workshops/courses.</p> <p>Coaching/feedback after an activity.</p> <p>Films with practical techniques.</p> <p>Observing a model to emulate.</p> <p>Demonstrations with examples.</p> <p>Computer-based training.</p> <p>Additional responsibilities.</p> <p>Mentoring others.</p> <p>Coaching others.</p> <p>Networking.</p>

Mapping the competencies

Mapping to key University documents

The competencies have been inspired by current and previous key University documents. The following paragraphs have been extracted from key University documents of the past five years, including the University of Exeter Corporate Plan 2006 – 2010.

Leadership and motivation

Link to the University's mission and key characteristics

'To contribute to the advancement of society, quality of life and the environment' (page 5). To be 'tolerant, humane and liberal minded, placing importance in values such as respect for others, pursuit of truth, equity and openness' (page 6) and to create 'an environment which enables all members of staff to maximise their contribution to the enhancement of the organisation's goals' (page 16).

Planning and organising

Link to the corporate plan

'The focus for the period of this plan is to identify and take the steps necessary to build on the strength of our foundations to be top 20. How can we summarise what this strategy means in practice? Its essence is simple: to recruit and retain the very best staff, provide them with the infrastructure to enable them to be excellent at what they do, and to recruit high-calibre students who can go on well-equipped to succeed in learning, work and in life' (page 3).

Commercial awareness

Link to the way the university will achieve its mission

Through 'the pursuit and advancement of knowledge through world-class research undertaken responsibly and with integrity; offering high quality teaching, and a challenging, intellectually stimulating learning environment to students of high potential who will be active participants in equipping themselves for employment and life in the modern world; and building partnerships with businesses and wider communities to engage in the development, application and transfer of knowledge, to generate investment, and to foster an entrepreneurial culture' (page 5).

Customer focus

Link to Professional Services' key characteristics, aims and core values

To provide 'the highest standards of service for the income generating academic community, students and other customers' (page 6); to 'optimise the Services' customer focus, effectiveness and efficiency'; to provide 'better support for marketing, student recruitment and admissions and other income generating activities, supporting the drive towards improving the employability of Exeter graduates, developing and implementing fit-for-purpose and web-enabled information systems, giving access to health and wellness activities for all and improving the physical infrastructure of the University's campuses'. In short 'to put clients at the heart of everything Services do' (page 21).

Continuous improvement

Link to Professional Services' key initiatives, objectives and values

To review and re-engineer 'major processes in accordance with priorities coming up through student surveys and other reviews – to eliminate wasteful use of resources, reduce bureaucracy and administrative costs for Schools and Services, and improve the services provided to students, staff and other clients' (page 21); to 'continue to reduce bureaucracy wherever possible, consistent with needs of good governance, promoting a fast, friendly and fault-free culture' (page 16). 'To free academic time for research, teaching and outreach by minimising bureaucracy and streamlining procedures' (page 21).

Communicating and influencing

Definition

Is the ability to communicate effectively with your own team and others who are dependent on it, ensuring that full understanding is achieved. It is about establishing openness and trust among staff. It also involves using effective strategies to influence others both internally and externally, presenting a persuasive argument for a course of action.

This is important to the University because all staff, teams and departments need to communicate openly, honestly and regularly to avoid duplication and misunderstanding, and to ensure effectiveness and efficiency.

The ability to develop yourself and others

Link to the corporate HR strategy

'The University will provide access to appropriate training and development opportunities to staff at all levels, ensuring that they are equipped with the range of skills and experience needed to satisfy our most demanding customers' (page 15).

The University will 'put in place effective systems for evaluating training', introduce 'a formal Personal Development Plan...for every member of staff' and 'credible succession plans...for every senior office-holder in the University' (page 16).

Teamwork and collaboration

Link to Professional Services' key initiatives and the features of governance and management

'We will appoint high calibre lay members of Council from a wide variety of backgrounds and ensure that their skills and experience are fully used across all areas of the University's business. Authority will be focused around executive managers to enhance individual accountability and responsibility, at the same time introducing improved internal communications.

We will streamline the University's committee system, reduce bureaucracy and free up valuable staff time. We will invite contributions from relevant members of the University's community including the Students' Guild. We will continue to develop our performance management and reporting systems, focusing our KPIs on what is most important to the University's success' (page 22).

'A new programme Working Together and other initiatives from 2006/07 to ensure that Services work in partnership with Schools (and across Services) to improve communications and work together towards shared priorities' (page 21).

'Working together will be a central theme to harnessing the work of Services with Schools' needs, so that Services are focused on support for the academic staff and students, and to ensure that maximum value for money is obtained. There will be a significant programme of work taking place over 2006/07 and following years to ensure that colleagues across all parts of the University work together in a mutually supporting way' (page 22).



Mapping to the IIP standard

'Levelling' as it applies to the Investors in People Standard

Direct comparisons with the individual competencies are not easily made but there are some relationships that might be worth considering. It should be noted that 'top managers' will also be 'managers' in parts of their role, and people includes everyone.

A strategy for improving the performance of the organisation is clearly defined and understood.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
<p>Top managers make sure the organisation has a clear purpose and vision supported by a strategy for improving its performance.</p> <p>Top managers make sure the organisation has a business plan with measurable performance objectives.</p> <p>Top managers make sure there are constructive relationships with representative groups (where they exist) and the groups are consulted when developing the organisation's business plan.</p>	<p>Managers can describe how they involve people when developing the organisation's business plan and when agreeing team and individual objectives.</p>	<p>People who are members of representative groups can confirm that top managers make sure there are constructive relationships with the groups and they are consulted when developing the organisation's business plan.</p> <p>People can explain the objectives of their team and the organisation at a level that is appropriate to their role, and can describe how they are expected to contribute to developing and achieving them.</p>

Learning and development is planned to achieve the organisation's objectives.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
<p>Top managers can explain the organisation's learning and development needs, the plans and resources in place to meet them, how these link to achieving specific objectives and how the impact will be evaluated.</p>	<p>Managers can explain team learning and development needs, the activities planned to meet them, how these link to achieving specific team objectives and how the impact will be evaluated.</p>	<p>People can describe how they are involved in identifying their learning and development needs and the activities planned to meet them.</p> <p>People can explain what their learning and development activities should achieve for them, their team and the organisation.</p>

Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
<p>Top managers can describe strategies they have in place to create an environment where everyone is encouraged to contribute ideas to improve their own and other people's performance.</p> <p>Top managers recognise the different needs of people and can describe strategies they have in place to make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.</p>	<p>Managers recognise the different needs of people and can describe how they make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.</p>	<p>People believe managers are genuinely committed to making sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for them to learn and develop which will improve their performance.</p> <p>People can give examples of how they have been encouraged to contribute ideas to improve their own and other people's performance.</p>

The capabilities managers need to lead, manage and develop people effectively are clearly defined and understood.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
<p>Top managers can describe the knowledge, skills and behaviours managers need to lead, manage and develop people effectively, and the plans they have in place to make sure managers have these capabilities.</p>	<p>Managers can describe the knowledge, skills and behaviours they need to lead, manage and develop people effectively.</p>	<p>People can describe what their manager should be doing to lead, manage and develop them effectively.</p>

Managers are effective in leading, managing and developing people.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
	<p>Managers can explain how they are effective in leading, managing and developing people.</p> <p>Managers can give examples of how they give people constructive feedback on their performance regularly and when appropriate.</p>	<p>People can explain how their managers are effective in leading, managing and developing them.</p> <p>People can give examples of how they receive constructive feedback on their performance regularly and when appropriate.</p>



People’s contribution to the organisation is recognised and valued.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
	Managers can give examples of how they recognise and value people’s individual contribution to the organisation.	<p>People can describe how they contribute to the organisation and believe they make a positive difference to its performance.</p> <p>People can describe how their contribution to the organisation is recognised and valued.</p>

People are encouraged to take ownership and responsibility by being involved in decision-making.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
	Managers can describe how they promote a sense of ownership and responsibility by encouraging people to be involved in decision-making, both individually and through representative groups, where they exist.	<p>People can describe how they are encouraged to be involved in decision-making that affects the performance of individuals, teams and the organisation, at a level that is appropriate to their role.</p> <p>People can describe how they are encouraged to take ownership and responsibility for decisions that affect the performance of individuals, teams and the organisation, at a level that is appropriate to their role.</p>

People learn and develop effectively.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
	Managers can describe how they make sure people’s learning and development needs are met.	<p>People can describe how their learning and development needs have been met, what they have learnt and how they have applied this in their role.</p> <p>People who are new to the organisation, and those new to a role, can describe how their induction has helped them to perform effectively.</p>



Investment in people improves the performance of the organisation.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
<p>Top managers can describe the organisation's overall investment of time, money and resources in learning and development.</p> <p>Top managers can explain, and quantify where appropriate, how learning and development has improved the performance of the organisation.</p> <p>Top managers can describe how the evaluation of their investment in people is used to develop their strategy for improving the performance of the organisation.</p>	<p>Managers can give examples of how learning and development has improved the performance of their team and the organisation.</p>	<p>People can give examples of how learning and development has improved their performance, the performance of their team and that of the organisation.</p>

Improvements are continually made to the way people are managed and developed.

Top managers	Managers (includes top managers)	People (includes top managers and managers)
<p>Top managers can give examples of how the evaluation of their investment in people has resulted in improvements in the organisation's strategy for managing and developing people.</p>	<p>Managers can give examples of improvements they have made to the way they manage and develop people.</p>	<p>People can give examples of improvements that have been made to the way the organisation manages and develops its people.</p>



Mapping to National Occupational Standards (NOS) for management and Professional Development opportunities

What are the management and leadership standards?

They coherently bring together the outcomes, behaviours and knowledge required to deliver identified management functions into a tool which can be used by individual managers and their employers.

The standards are designed to act as a benchmark of best practice. To ensure that they are fit for purpose they have evolved over a period of ten years through a process of extensive consultation with over 60,000 employers and organisations.

The standards include behaviours that underpin effective performance. This is in recognition of feedback from employers that the soft skills which managers bring to their role are as important as the hard technical skills they possess. Full details of the standards can be found at: www.management-standards.org/content_1.aspx?id=10:2011&id=10:1917

Using the standards

1. Continuing Professional Development

Managers can use the standards to:

- Describe the skills they need
- Evaluate the skills they already have
- Identify the skills they will need.

2. Business planning

Employers can use the standards to:

- Evaluate the skills already in the workforce
- Identify skills gaps
- Plan training and recruitment.

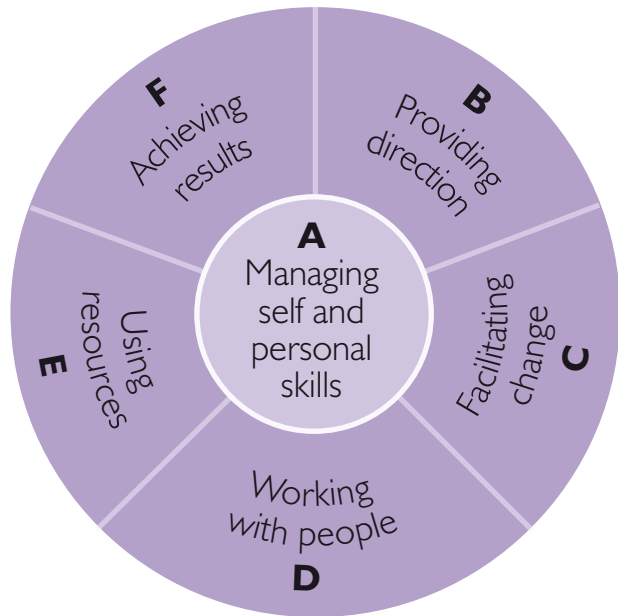
3. Workforce management

Employers can use the standards to:

- Aid selection and recruitment
- Aid employee development.

Full list of standards

- a) Managing self and personal skills
- b) Providing direction
- c) Facilitating change
- d) Working with people
- e) Using resources
- f) Achieving results



Mapping to HERA

Exeter competencies	Map to HERA competencies
Leadership and Motivation	Good match to Teamwork and Motivation at all levels
Planning and Organisation	Good match to Planning and Organisation
Commercial Awareness	Partial matches to more than one HERA element: Liaison and Networking; Service Delivery; Initiative and problem solving; Knowledge and experience
Customer Focus	Almost complete match to Service Delivery
Continuous Improvement	Partial matches to more than one HERA element: Initiative and Problem solving; Planning and Organising; Analysis and Research
Communicating and Influencing	Mostly matches with Communication and possibly Decision Making
The Ability to Develop Yourself and Others	Matches well to Team Development
Teamwork and Collaboration	Mostly matches with Teamwork and Motivation; partial match with Liaison and Networking





Staff Learning and Development
Northcote House
The Queen's Drive
Exeter EX4 4QJ

Telephone +44 (0)1392 264515
Fax +44 (0)1392 263414
Email sld@exeter.ac.uk

www.exeter.ac.uk/learninganddevelopment

