

a) Offering a meeting in the early stages of your role to discuss your responsibilities, research project, any funder terms, and routine management (p1)	b) Supportive of your career development and the career options you are considering (p2)	c) Offering or enabling regular conversations about your career plans, including an annual Career Development Review (or equivalent) (p4)	d) Supporting you in planning and benefiting from 10 days' professional development (pro rata) per year. Please note your funder's terms and conditions in relation to time spent on professional development (p5)	e) Engaging with their own development as a line manager (p6)
<p>Managing employee during the early stages of employment/probation - Probation HR Support</p>	<p>How to have One-to-one conversations, enabling discussions about your group members' career options.</p> <p>Coaching Workshop – The Confident Manager Series People and Organisational Development</p> <p>Mentoring - Mentoring — Radcliffe Department of Medicine</p> <p>Career service and planning - Careers service - Career planning University of Oxford</p> <p>Researcher's Trailmap - Researcher's Trailmap University of Oxford</p>	<p>Importance of PDR and CDR and how to conduct a good PDR/CDR</p> <p>Guidance and resources - Career Development Reviews for Fixed-Term Researchers University of Oxford</p> <p>Skills guide on how to have a good career conversation with their team member(s) – The Confident Manager Series People and Organisational Development</p> <p>Training for line manager - How to do a career development review, for reviewers (Class)</p>	<p>10 days to spend on professional development - Professional Development Annual Allowance — Radcliffe Department of Medicine</p> <p>Other trainings and workshops available for researchers – Training and workshops University of Oxford</p> <p>Skills Training — University of Oxford, Medical Sciences Division</p> <p>Your Next Career Step Event for Researchers (Web)</p> <p>How to do a career development review, for reviewees (Class)</p>	<p>Resources and training available for leading your team and also for succeeding in your own role - People and Organisational Development Unit People and Organisational Development</p> <p>Other useful resources - Programmes People and Organisational Development</p> <p>Networks People and Organisational Development</p> <p>Toolkits People and Organisational Development</p> <p>Leadership Framework People and Organisational Development</p> <p>Discover inrehearsal People and Organisational Development</p> <p>Essentials of People Management in Research (Class)</p>

a) Offers a meeting in the early stage of your role to discuss your responsibilities, research project, any funder terms, and routine management.

Overview:

University guidance on [Probation | HR Support](#) is useful here, whether or not the employee has a formal probation period set.

Managing employee during the early stages of employment (also called probation) requires careful attention and guidance to ensure they meet performance expectations and successfully integrate into the department. Probation is a two-way process, a review of both perspectives and an opportunity for either parties to open discussion for any improvements and/or changes.

Key points:

1. **Clearly communicate expectations:** In line with the job description, clearly communicate the expectations, goals and performance standards to your employees. Ensure that they have an understanding of what is required of them during their probation period.
2. **Provide orientation and training:** Offer the online departmental induction <https://hr.admin.ox.ac.uk/probation> and RDM Divisional induction and provide a local induction to include introducing them to colleagues, their immediate work environment, fire and health and safety training and provide necessary training and resources to help them with their role.
3. **Set specific probationary goals:** Establish specific and measurable goals which align with their job description and regularly assess their progress toward these goals.
4. **Support their development:** Provide resources, training and advice to help them acquire the necessary skills and knowledge to excel in their roles. Consider assigning a buddy to and making them aware of the RDM Mentoring programme who can provide alternative support and guidance.
5. **Offer feedback:** Provide regular/timely feedback. Offering constructive criticism and positive reinforcement to help them understand their strengths and areas for improvement.
6. **Address performance issues promptly:** If there are any performance issues, ensure to address them and provide clear guidance for improvement. It is also important to document these performance discussions and any action plans developed to address the issues.
7. **Conduct probationary performance reviews:** Make sure to schedule regular performance reviews and assess their performance against the established goals, discuss any performance gaps and provide feedback on their progress and have a meeting at the beginning, middle and end of probationary period.
8. **Keep records:** Maintain documentation of your probationary employee's performance, including feedback, particularly performance reviews and any disciplinary actions if necessary. This documentation will be valuable for future reference and decision-making.
9. **Make informed decisions:** At the end of the probationary period, aim to make an informed decision about your employee's suitability for continued employment (get advice from the HR team if necessary).

Further information including forms:

Policy for probation, further guidance for managers handling the probationary period for new members for staff and internal transfers and probationary forms can be found on our University website: [Probation | HR Support](#)

b) Is supportive of your career development and the career options you are considering

Overview:

Effective one-to-one meetings with your team members are crucial for building strong relationships, providing feedback, fostering professional growth and enabling discussions about the future including their career options. One-to-one conversations should happen at agreed intervals between you and your group members/employees. Regular one-to-ones are important because they provide the opportunity to look at:

- Performance: review progress on tasks or projects
- Challenges: problem solve
- Objectives: re-set objectives in the light of new information
- Learning and development/career aspirations: find ways to fill immediate learning needs and longer-term development/career goals
- Wellbeing and support: find out how people are and if line managers can support their needs

Key points:

1. **Prepare with agenda:** Make sure to prepare in advance for the meeting and consider if it would be helpful to agree on the agenda with your employee. This helps both you and your team member(s) to stay focused and maximises the value of the meeting.
2. **Regularly schedule one-to-one meetings:** Try to schedule regular one-to-one meetings with your team member(s). This shows your commitment to enabling them to perform well and provides a dedicated space for ongoing communication
3. **Uninterrupted, confidential and comfortable environment:** Where possible, choose a private location where an open and honest conversation can be held.
4. **Active listening:** Make sure you give undivided attention to your team member, show empathy and ask clarifying questions to demonstrate your engagement and understanding.
5. **Review objectives and provide regular feedback:** Take objectives (professional and career) into one-to-one meetings. If they don't seem relevant, rewrite new objectives. Offer your employee constructive feedback that is specific, actionable and aimed at supporting their growth. Aim to recognise achievements, address performance gaps and discuss any concerns or challenges.
6. **Problem-solving and decision-making:** Use your one-to-one meetings to discuss and table problems or challenges that your team member(s) may be facing. Collaborate with them to identify solutions, make decisions and provide guidance on how to overcome obstacles.

7. **Wellbeing:** Check their personal as well as the work situation and listen out for signs of difficulty and help and support anything that needs attention (seeking information and advice from HR where needed).

Useful tips:

1. **Build rapport and trust:** Use the one-to-one meetings as an opportunity to build rapport and trust with your team members. Show genuine interest in their professional, personal well-being, future aspirations and create a safe space for open dialogue and sharing.
2. **Encourage two-way communication:** Engage in a transparent communication. Encourage and involve your team member(s) in the conversation by asking them to share their thought, concerns and ideas. Make sure that you are listening attentively and respond respectfully, creating a collaborative and supportive environment

Coaching:

You could also help your team member(s) by taking a coaching approach. Coaching involves facilitating a conversation where individuals explore challenges or opportunities they wish to address. It focuses on the coach/manager asking open questions and allowing the individual to find a solution, by asking open questions, which may be particularly helpful in career discussions. In order to help your team member(s) with their career planning, you could use a coaching approach to help them design their futures and their goals.

Training on coaching is available:

[The Confident Manager Series | People and Organisational Development](#) – this includes a half day Coaching workshop

Other sources of support:

[Mentoring — Radcliffe Department of Medicine](#). The Department runs a mentoring scheme. Mentoring involves a mentor offering their time and support to a mentee in order to provide confidential, non-judgemental and constructive assistance, aiding the mentee's development as they see fit. This approach has helped staff in their career planning, as the mentor would have faced similar challenges and hence offers objective guidance, drawing from their experience to help the mentee find solutions.

[Careers service - Career planning | University of Oxford](#)

The University provides comprehensive information and guidance via one-to-one careers support, useful career resources, workshops and events which might be a useful resource for you to support your team member(s) with their career planning and for them to get independent support and guidance.

[Researcher's Trailmap | University of Oxford](#) – this is a useful resource for researchers so that they can see what they need to do to manage their own careers

c) Offers or enables regular conversations about your career plans, including an annual Career Development Review (or equivalent)

Overview:

Routine management and one-to-ones culminate in an annual Professional Development Review (PDR) where you discuss the performance and development of your employee during the year, which, significantly for researcher staff, this includes a Career Development Review (CDR). A CDR is a structured and confidential conversation about your employee's career development. The main focus of a CDR is to support your employees career planning and explore their personal career aspirations in any role or sector. The conversation should identify their career goals, opportunities for them to explore and improve their career prospects, routes to further their career development. CDR conversations should also essentially identify related skills and professional development or any training objectives that they required to further develop their career. In some instances, your employee may prefer their CDR to be undertaken by someone other than you. Should this be the case, they will need to arrange this themselves.

Further guidance and resources:

[Career Development Reviews for Fixed-Term Researchers | University of Oxford](#)

The researcher should fill in the 'Career conversation planner' to be discussed at their CDR and their line manager, or alternative, should review the 'CDR guidance note for Reviewer'.

An essential guide for you as a line manager is the 'Career conversations for managers' skills guide which can be found on the University's People and Organisational Development (POD) website. This document shares tips to helping managers have career conversations with their team member(s) which can be found on the POD website - [The Confident Manager Series | People and Organisational Development](#) (link under documents at the bottom of this page)

[How to do a career development review, for reviewers \(Class\)](#) – This training course is designed for line managers, as it provides guidance on carrying out career development review for their team member(s).

d) Supports you in planning and benefiting from 10 days' professional development (pro rata) per year. Please note your funder's terms and conditions in relation to time spent on professional development.

Overview:

The 10 days of professional development is an allowance for researchers in your group to develop their professional competencies and gain experience to support their future career (whether in academia or beyond).

Professional development time enables development that extends beyond the training requirements for their current role in your group, however it may include required training where there is crossover with their own professional development plans.

Some examples of professional development that you can support in planning and benefiting your team member(s) from the 10 days are:

- participating in conferences (in addition to any required by the day job)
- developing new research collaborations
- writing/developing funding applications for new projects
- joining a committee/being a researcher representative
- contributing to policy development, public engagement or knowledge exchange
- undertaking training courses
- workplace shadowing
- mentoring/being a mentee

This list is not exhaustive and some funders/schemes might have specific guidance on professional development activities. In this case, you and your team member must refer to the relevant funder's terms and conditions in relation to time spent on professional development.

Your team members should record their professional development as they go along, and report on it in their annual PDR/CDR.

Other sources of information:

RDM policy on 10 days' annual professional development ([Professional Development Annual Allowance — Radcliffe Department of Medicine](#))

Training and workshops available in the University for researchers –

- [Training and workshops | University of Oxford](#)
- [Skills Training — University of Oxford, Medical Sciences Division](#)
- [Your Next Career Step Event for Researchers \(Web\)](#)
- [How to do a career development review, for reviewees \(Class\)](#)
- RDM also puts on training and development activities which are advertised in the RDM bulletin

e) Engages with their own development as a line manager

Overview:

As line manager's your role is crucial in leading your team and there are resources and training designed specifically for you in order for you to succeed in your role. There are sources within RDM and outside that can help develop knowledge and skills in this area. Heads of RDM Divisions, Business Managers and local HR teams are a good place to start.

Other resources:

[People and Organisational Development Unit | People and Organisational Development](#)

- Programmes - POD delivers programmes that relate to the development of management and leadership skills. [Programmes | People and Organisational Development](#)
- Network - There is a network for Coaching, Mentoring and Professional Services Mentoring scheme. [Networks | People and Organisational Development](#)
- Toolkit - Essential guidance regarding PDR and CDR, supporting new staff, Managers' Toolkit, Leadership Framework, developing others, etc. [Toolkits | People and Organisational Development](#)
- [Managers' Toolkit | People and Organisational Development](#) - there is a link on the right-hand side of this page where you can join a People Managers' Team channel.
- [The Confident Manager Series | People and Organisational Development](#) – A flexible and innovative programme focused on people management skills development.
- [Leadership Framework | People and Organisational Development](#) – includes a self-assessment of leadership skills and resources and exercises, useful for managers.
- [Discover inrehearsal | People and Organisational Development](#) – New learning and development platform that will help you support your team member(s) professional growth.
- [Essentials of People Management in Research \(Class\)](#) - designed to introduce managers of research staff to key responsibilities and people skills needed to create a healthy and productive research environment.
- Drop-in sessions available – Researcher hub provide drop-in sessions (in-person or online). This session is an opportunity to meet the team and an opportunity to ask them questions. To book into their weekly open office hours (Thursdays 3–4pm, in-person or online), please email researcherhub@admin.ox.ac.uk
- Further guidance and resources available for new line managers if they wish to seek this from the local HR team or RDMS HR team. Drop-in sessions also available for new line managers to discuss their line management progress. Please email rdm-strategic-hr@rdm.ox.ac.uk to arrange this.