Personal Development Dialogue, PDD
Managers and co-workers

Manager responsibility

STEP 1: Preparation

STEP 2: Execution

STEP 3: Evaluation

STEP 4: Follow up

Co-workers responsibility
Personal development dialogues at LiU

Personal development dialogues are part of our systematic work to improve the work environment, and an important component in the planning of operations. The dialogues are to be well-prepared and recurrent, and should contribute to the development of operations and the co-worker. They take the form of an annual structured dialogue between the manager who has personnel responsibility and the co-worker, and they focus on the work environment, mission and goals of the co-worker, and increasing his or her professional expertise. A personal development dialogue should look to the future, and should be followed up in the annual salary review. Both the manager and the co-worker have a responsibility to prepare for the dialogue, and both are responsible for the topics and quality of the discussion. The dialogue should begin with a review of the preceding year’s dialogue.

This brochure describes the various stages of a personal development dialogue and describes its aims and design. A template, “Support document for conducting personal development dialogues”, is available, and this is used to prepare for the discussion and to record its conclusions. In particular, the section dealing with aims and planned development in the coming year is to be completed during the dialogue. In order for personal development dialogues to function as intended, the unit/division must organise them efficiently. It is the responsibility of the leadership that this is done, and thus the work is not described here.
The purpose of personal development dialogues

**For the unit/division**
- To strengthen collaboration and participation, and in this way make LiU a more attractive workplace.
- To achieve consensus between the goals and strategies of the unit/division, the goals of the co-worker and his or her expertise.

**For the manager**
- To conduct a dialogue about the views of the co-worker concerning operations, the organisation of the work, leadership, work environment, his or her achievements and the need for professional development, and to become aware at an early stage of evidence of ill-health or stress.
- To clarify and discuss the mission, expectations and goals of the co-worker.
- To secure the expertise and commitment of the co-worker.

**For the co-worker**
- To conduct a dialogue about the operations and organisation in order to help develop and possibly also change the way operations are carried out.
- To participate in a dialogue about his or her mission and goals.
- To present his or her wishes and requirements for developments in, and possibly also changes in, the work situation.
STEP 1

Preparation

The aim of preparation

To ensure a high-quality discussion.

It is a joint responsibility for both manager and co-worker to prepare for the discussion. A good way to prepare is to use the template “Support document for conducting personal development dialogues”. The co-worker and the manager prepare for the dialogue by thinking through the various topics and points, and making preparatory notes.

Manager

- Inform the personnel about the upcoming dialogues, for example at a group meeting. Encourage them to prepare for the talks.
- Arrange dialogue scheduling, and book a location, preferably neutral. Make sure that each co-worker has received the documentation relating to the dialogue.
- Review the dialogue from the previous year. Go through any notes from the preceding dialogue, together with the goals and development plans that were established. Have the goals that were set been achieved, and have the agreed development work, action plans, and changes been carried out?
- Prepare constructive feedback that you wish to give to each co-worker.
- Prepare for a discussion of the mission and goals of the division or unit, and how they are related to operations at the department (or equivalent).
- Consider the requirements for expertise development coupled to the operations and the mission of the co-worker.
- Where necessary, obtain information from other principals, such as commissioners and research supervisors, to obtain an overall picture of the mission and workplace situation of the co-worker.

Co-worker

- Review the strategies, challenges and priorities that have been formulated for the department (or equivalent) and the mission and goals of the division or unit.
- Review the dialogue from the previous year. Go through any notes concerning goals and development plans that were set out during the preceding dialogue. Have the goals been achieved and have the actions agreed upon been taken?
- Prepare constructive feedback that you wish to give the manager, concerning such matters as support, clarity, decision-making, availability, responsiveness, respect, initiative and commitment.
- Prepare a description of your current work situation, dealing with such issues as collaboration, work conditions, attendance, and the work environment.
- Review your job scheduling, job specifications, or similar.
- Consider your goals for the work during the coming year.
- Consider whether the tasks pose challenges (new opportunities, obstacles or problems), and consider whether it is necessary to set priorities. Will it be necessary to increase your skills and expertise, and how much support will you require to be able to meet the challenges and reach the goals?

Reference material

- LiU’s strategy map: http://old.liu.se/insidan/strategier/strategiarbetet
- Other reference material: http://old.liu.se/insidan/HR-Personal/kompetensutveckling/medarbetarsamtal
Execution

Mutual trust and shared responsibility

A personal development dialogue is built on mutual trust and shared responsibility. The template “Support document for conducting personal development dialogues” is used during the dialogue.

Some general principles for the dialogue

- Agree in advance about the duration of the dialogue.
- Review the template and agree on the areas and issues on which the dialogue should focus, from the points of view of both the co-worker and the manager. Shelve all issues that are not relevant to the current discussion, and set a date to discuss these separately.
- Be an active listener and use interested enquiry to clear up uncertainties and develop alternate solutions.
- Respect each other’s opinions and experiences.
- Identify any topics that need to be developed in more depth, and decide how this is to be done.
- Anything said during the dialogue is confidential and should remain between the manager and co-worker. Should it be necessary to refer any issue to a third party, the manager must inform the co-worker that this will be done.
- Agree on who is to record decisions taken concerning goals and planned development in the coming year. A copy of these should be held by both the manager and the co-worker, to be referred to during the next salary review and next personal development dialogue. The document is to be seen as working material.
- Book a date for follow-up and feedback, where relevant.

Agenda

- Follow up of the dialogue from last year
- Current situation – work environment
- Feedback
- Common understanding of the mission
- Goals
- The long-term future
- Career development review in the light of LiU’s career path for teachers (if relevant)
- Goals and planned development in the coming year

The content of each point on the agenda is described in more detail in the template “Support document for conducting personal development dialogues”.

Goals and planned development in the coming year

Record the agreed planned development, measures to be taken and changes to be carried out during the coming year under the heading “What is to be done”. This is to confirm that the two parties view the agreement in the same way, to prevent it from being forgotten, and to make it possible to follow up the dialogue at the next salary review and the next personal development dialogue. Furthermore, it is an advantage to have the agreements in written form, should a new manager be appointed during the year.

Support required

To ensure that the co-worker has access to the support that he or she needs to carry out the mission, the manager and the co-worker should agree on:

- how constructive feedback is to be given by the manager or other person during the year. This should include such aspects as the areas to be covered and how often feedback is to be given.
- the need for support to be given for various tasks and goals (adapted to the particular situation).
Goals
Setting goals increases motivation, creates clarity and helps us to give the correct priority to tasks, which influences the results achieved in the long term.

Goals can be formulated in several ways:
1. Outcome goals: relate to the benefits of an initiative and what we want to achieve, avoid or preserve
2. Performance goals: relate to the quality and/or quantity that our deliverables require in order to achieve a result
3. Learning goals: relate to increasing expertise, acquiring and developing knowledge and skills
4. Process goals: relate to how we work and act on the way to reaching the goal.

Research into what is known as “goal-setting theory” shows that five characteristics of goals are crucial in creating motivation and results:
- Goals must be clear, well-defined and measurable.
- Goals must be challenging and must stimulate to making an effort.
- Co-workers must participate in setting the goals and in determining how they are to be reached.

STEP 3
Evaluation
The purpose of evaluation is to develop and improve the design and execution of the personal development dialogue.

Together, make notes about what has functioned well, and give constructive suggestions about changes that could be made for the next dialogue.

STEP 4
Follow up
The purpose of follow up is to evaluate individual and common development plans, measures taken and changes made.

Manager responsibility
- Carry out short-term and long-term activities that were agreed on at the personal development dialogue, within the current budget framework. This may relate to skills development activities, the acquisition of workplace equipment, or the adaptation or change of duties.
- Take up for discussion any common issues, for example work environment issues, that have come up during the personal development dialogue, and document these in the relevant plans, such as the plan for systemic work environment initiatives.
- Provide feedback on completed activities and measures taken to the co-workers concerned.

Co-worker responsibility
- Carry out the activities that have been agreed on during the personal development dialogue, and inform the manager when these have been completed.
This material has been developed in collaboration between employer organisations and employee organisations (the Swedish Confederation of Professional Associations (SACO), the Public Employees’ Negotiation Council (OFR), and the Swedish Union for Service and Communications Employees (SEKO)), based on the cooperative agreement.

Questions about the material can be answered by the Human Resources Division.