

Staff Review and Development

Academic Staff Pathways 1, 2 & 3 (Teaching and Research; Research; Teaching)

Introduction

The Staff Review and Development (SR&D) process is one of the most important support mechanisms for staff at Bristol. The process provides the key to understanding your role and where you fit in to the Team/Department/Faculty/University. It is part of a broader performance management framework for ensuring success - providing links with processes for induction, initial service review, progression, promotion etc. The SR&D process provides a safe and appropriate environment within which discussions about your performance can - and should - take place.

Performance management is about inspiring and motivating our excellent performers to maintain their levels of excellence; about inspiring and motivating good performers to achieve excellence; and inspiring and motivating satisfactory performers to become good, and then great, performers! It is first and foremost a supportive process, but it does also provide the opportunity for those difficult, but essential, discussions where either you or your manager have concerns about how things are going.

SR&D is the place where your successes can be shared and celebrated, it is one of those rare occasions where you get to talk about yourself - your career aspirations and development needs; how you think you are succeeding; your concerns; and any things you feel are getting in your way and/or preventing you from performing at the level you wish. It is the place where you get to find out how you are perceived to be performing, how you are perceived to be achieving against agreed objectives, and where you are perceived to be (and to be going) in your career.

The SR&D discussion:

The review form provides a vehicle for taking you through a full and effective SR&D discussion. By completing the form in advance of your SR&D meeting, referring back to your previous SR&D form as appropriate, you can ensure that your SR&D discussion covers all the relevant issues, and includes as a minimum the following issues:

Taking Stock – a review of your achievements over the past year, including a review of your progress against the objectives agreed last year.

Planning ahead – setting agreed objectives for the coming year, being clear about timescales and expected outcomes.

Your wider career – a discussion of where you are now in your career, where you want to be, and how you might get there. This part of the discussion will include consideration of issues of progression and/or promotion, career aspirations/opportunities, development needs and any short, medium or long term plans to leave the University

Outcomes – This is an important final part of the discussion, where you and your reviewer ensure a shared understanding of the review discussions, agree follow up action, and who is responsible for what.

The review process:

1. **Arrange a meeting** with your reviewer, who will be your head of department or a nominee.
2. **Draft Parts A to C of the form in advance** – take time out to consider these sections carefully, and to draft them as fully and honestly as you can. This is your opportunity to set out what you believe your objectives might be for the coming year, and to initiate a full discussion about this with your reviewer.
3. **Pass the draft form to your reviewer at least one week before the meeting.**
4. **The SR&D meeting should take place in an appropriate environment (location, relaxed, adequate time)**
5. **After the meeting, update Parts A to C in light of your discussions to reflect agreed objectives and actions.**

6. Pass the form to your reviewer as soon as possible to complete Part D.

All key points need to be agreed, recorded and signed off by the reviewer, then returned for further comment and your signature.

7. Retain a copy to refer to during the coming year, and pass the original form to your head of department.

For more information on the Staff Review and Development Scheme, including downloadable forms, please visit the Staff Development website at www.bris.ac.uk/staffdevelopment/staff-review/

Paper copies of all documentation are available from Staff Development (Tel: 0117 33 16752).

YOUR DETAILS

Name:	Job title; Pathway; Level:
Progressible role:	Due date for Progression (where applicable):
Department:	Date of this review:
Date started this post:	Date of previous review:
Reviewer's name:	Reviewer's job title:

PART A: TAKING STOCK

- Summarise the main goals/aims and targets you have been focusing on over the review period, including:
 - goals/aims and targets agreed last year
 - other major areas you have been focusing on in your job.
- Summarise your achievements in relation to (as appropriate) teaching, research, management/administration and any major external professional activities.
- Identify areas in which you have not achieved what you expected to, including:
 - any difficulties you have had in achieving the agreed goals/aims
 - ideas on what could be done to improve this in the future
 - areas related to progression or promotion.
- Identify any other areas for discussion, which might include:
 - ethical implications of research
 - work/life balance
 - flexible working
 - strategic priorities
- For recently appointed staff, discussions should cover induction and the teaching and learning programme, in particular:
 - Arrangements for mentoring
 - Arrangements for peer observation of teaching
 - General progress and any difficulties/issues being experienced

PART B: PLANNING AHEAD

- List your proposed goals/aims and targets for the coming year, including:
 - a summary of your anticipated activities in (as appropriate) teaching, research and management/administration with target dates wherever relevant
 - how changes in the School/Faculty/University and higher education sector will impact on your activities.
 - How any plans you might have to leave the University might impact on the School/Faculty/University
- List any further items you would like to discuss.

In identifying goals/aims, you may want to refer to last year's review form, peer observation of teaching, reports on research projects and other activities, feedback from other people, such as students, colleagues and internal and external examiners and assessors, eg QAA, professional accreditation bodies and research funding bodies.

In the discussion with your reviewer, agreement should be reached on your key objectives for the coming year, including clear measurable outcomes, and reasonable timescales for achievement. The final version of your SR&D form should be amended to clearly state these agreed objectives.

Obstacles:

What might get in the way of achieving your objectives, and what can be done about it?

Personal obstacles:

Department/University obstacles:

PART C: YOUR WIDER CAREER

- This section is to enable you to consider your longer term career development, personal ambitions or changes to your role
- Indicate the main areas in which you feel you have developed over the review period, including:
 - development events (e.g. conferences, seminars, training events) and how they have benefited you
 - wider personal and professional development opportunities you have taken.
 - In the discussion with your reviewer you may wish to explore what impact they have observed of these activities on your performance, and on your eligibility for promotion/progression

Use this section to consider your immediate objectives and your longer term career objectives, and how development now may help you meet these objectives. This may include consideration of:

- how your personal ambitions and priorities can be reconciled with/incorporated into the department's/ Faculty's/University's priorities (this may include consideration and discussion of any short, medium or long term plans or wishes to pursue your career elsewhere or retire)
- training, development, support or further resources you might need to achieve your short, medium and long-term goals.
- Promotion and progression criteria
 - what additional experience, knowledge and skills might you need for promotion or progression purposes, where appropriate. You and your reviewer should have a full and open discussion about where you are in relation to promotion/progression, identifying any problems or issues, and agree processes to optimise promotion/progression prospects. Where applicable, discussions should include completion of the teaching and learning programme
- Personal support needs.

If you feel you need guidance on any of the topics covered on this form, there are several resources you may wish to access including:

- Staff Development courses (www.bris.ac.uk/staffdevelopment/courses)
- Career Coaching website
- Career Coaching service: if you wish to discuss any aspect of your career development with an impartial career coach, send an e-mail to career-coaching@bristol.ac.uk to book an appointment.

Part 1: What are the three main items to be discussed at the review from the reviewee's point of view:

(i)

(ii)

(iii)

Part 2: Reviewer's additional points for discussion:

(i)

(ii)

(iii)

PART D: OUTCOMES

(to be completed shortly after the review and signed by the reviewer, reviewee and head of department)

Summarise the review meeting, ensuring activities, goals/aims and targets for the forthcoming year are agreed. These notes should include:

- practical changes which have been agreed so that these are clearly identified and recorded
- recommendations for further training, development, support or other resources
- an overview of any other relevant points not covered elsewhere on the form.

Reviewer's comments:

Signed

Dated

Please return the form to the reviewee for further comment and signature.

Reviewees's comments in response to the reviewer's summary and reflections on the review process:

Signed

Dated

Please return the form to the reviewer (or pass to head of department, if this has been agreed).

Comments of head of department (if he or she is not the reviewer):

- What are the implications for the Department of this review?
 - Flexi-working policies? Training needs for managers/individuals
 - Business planning cycle? Academic direction of Department
 - Is the role identified as eligible for progression? (P2 & 3 only)
 - Is the individual 'on track' for progression? (P1 and relevant P2 & P3 posts)

Signed

Dated

Reviewers: Please ensure all actions and training and development needs are fed back to the head of department either on the Overall Departmental Planning Form or by meeting with the head of department to discuss the outcomes of this staff review.

FOR ACTION

Keep original copy of form in the department.

Fully completed and signed copy of form returned to reviewee on (date):