

# Staff Review and Development

## Support Staff Grades E-I

### 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, 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 and development needs as well as 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.

**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/](http://www.bris.ac.uk/staffdevelopment/staff-review/) Paper copies of all documentation are available from Staff Development (Tel: 0117 33 16752).**

## Purpose of the process

The purpose of this process is to take stock and plan ahead. The form provides various prompts and suggestions to help. You may decide that some parts of the form are not relevant to your situation, but do read and consider the content of each section carefully before deciding whether to complete it. The form comprises four parts:

**Part A: Taking Stock** – to review achievements over the past year.

**Part B: Planning Ahead** – to develop ideas for the next year.

**Part C: Agenda for Review** – identifying the things you would like to raise with your reviewer.

**Part D: Outcomes** – recording the decisions made.

## The stages of the review process

The conversation with your reviewer is at the heart of the process and the administration of the paperwork is secondary. Nevertheless, you may find the following checklist helpful:

- Collect any relevant background documents.**  
Check you have your current job description and previous year's completed review form.
- Your reviewer will contact you to arrange a meeting.**  
Your department will plan the process at a convenient point during the academic year.
- Prepare Part A, Part B and the first half of Part C.**  
You may find it useful to draft any preliminary notes for these sections on a spare copy of this form.
- Pass the form to your reviewer one week before the meeting.**  
The reviewer completes the second half of Part C, takes a copy of the complete form, and returns the original to you at least three days before the meeting.
- After the meeting, go back over Part A and Part B and update them in light of the discussions you have had and the actions you have both agreed.**  
This is why preparing the form in draft is useful!
- Follow the process outlined in Part D.**  
All key points including training needs should be recorded, together with target dates by which actions arising from the review will be completed.

## YOUR DETAILS

Name:	Job title:
Department:	Date of this review:
Date started this post:	Date of previous review:
Reviewer's name:	Reviewer's job title:

## **PART A: TAKING STOCK**

*(you can draft this before the meeting and revise it afterwards)*

**Describe briefly the overall purpose of the job according to your job description:**

**What have been the main targets you have been concentrating on in your job over the review period (referring to last year's review form)?**

**List your main successes over the past year:**

**List any difficulties you have had in achieving your targets:**

**What aspects of your job do you most enjoy/least enjoy?**

**What are your particular skills and strengths in your current job?**

**What skills, abilities and strengths (if any) are not being fully used in your current role?**

**What new skills or knowledge have you acquired from training and development activities during the review period?**

**What training have you done?**

**What skills and knowledge have you acquired?**

**How has it helped you in your job?**

## PART B: PLANNING AHEAD

*(you can draft this before the meeting and revise it afterwards)*

Select a few key objectives: don't try to include every task!

You may find it useful to look at:

- Your job description.
- Last year's review form.
- Feedback from other people: internal and external clients, colleagues, students etc.

**Try to make these objectives specific and achievable.**

**In what ways do you see your job changing in the coming year?**

**What objectives would be appropriate to you for the next review period? (please list)**

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**Target date for completion**

**Support:** What are the difficulties and frustrations in your job, how can you be better supported?

**Development and training needs:** What development and training needs, personal and job-related, have you identified that would help you in your present role, eg job swap, job shadow, coaching, mentoring, formal course?

**Medium and long-term development:** The previous sections have considered relatively short-term issues. In the longer term, what career development, personal ambitions or changes in duties/roles would you like to consider? Do you have any plans to move on or leave the University?

## PART C: AGENDA FOR REVIEW

*(for completion before the review meeting to set priorities for discussion)*

1. Complete Part 1 and then pass the entire form to your reviewer.
2. The reviewer should complete Part 2, take a copy of the complete form and return the original to the reviewee.

### 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)

**It is the responsibility of the reviewer to make sure all the items on both lists are discussed.**

## PART D: OUTCOMES

(for completion after the review meeting)

1. First update Parts A and B above in the light of your discussions at the review meeting.
2. Then pass the form to your reviewer. Ensure that the reviewer sees, comments in and signs Section 1 below.
3. When it is returned by your reviewer, complete Section 2 below.
4. Please sign the form, keep a copy for yourself and pass the original to your head of department.

### Section 1. Reviewer's comments on the review outcomes recorded above:

Signed

Dated

**Follow-up meeting arranged for (date):**

**Training and development needs/actions recorded on Overall Departmental Planning Form?**

(date):

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

### Section 2. Reviewee's comments on the review process and outcomes:

Signed

Dated

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

### Section 3. Comments of head of department (if he or she is not the reviewer):

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):**