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| logo-uob-med | Staff Development and Performance Review |

***For staff in grades 3 and above in the following job families:***

***Management, Specialist and Administration (not in departments using the Effective Behaviours Framework)***

***Technical and Experimental***

***Operational and Facilities Support***

The principal aims of the SDPR scheme are to:

* Review the past year, providing feedback, identifying successes and learning from problems in the achievement of last year’s objectives
* Plan and set goals for the future, taking into consideration the objectives of the department, the knowledge, skills and attitudes of the member of staff and their career development aspirations.

This form should focus the discussion between reviewer and reviewee, so that you can have useful conversations about achievements, performance, aspirations and future plans, and make a record of agreed outcomes and objectives for future reference.

|  |
| --- |
| Full Name: |
| Job title: |
| Department: |
| Date of SDPR meeting: |
|  |
| Reviewer: |
| Reviewer’s post: |
| Period covered by this SDPR: |
| *Please complete all fields* |

**Process**

* The reviewee should provide the reviewer with an account of their progress against the agreed objectives for last year, plus any other activities (Section A). Initial thoughts may be included in sections B and C. Attach a current job description) where appropriate.
* The reviewer may make initial comments in section A and return these to the reviewee in time for the meeting.
* Following the meeting, either party completes the form to record the agreed objectives for the year ahead (Section B), and the development plan for the reviewee (Section C)
* After any further comments have been added (Section D), the agreed final form should be uploaded to the reviewee’s iTrent record through Manager Self Service, and the date of the review recorded on iTrent.

# SECTION A: TAKING STOCK

The reviewee should record their reflections here and pass the form to the reviewer in good time for the meeting

List last year’s objectives, comment on what progress you have made against them, and outline any additional achievements, duties or responsibilities that you wish to highlight and reflect on.

Be *selective –* don’t just list everything you did but the things that it’s useful to reflect upon – and *evaluate* why things went well or were difficult, and what lessons you draw from the experience.

|  |  |
| --- | --- |
| **Objective / activity** | **Comments** |
| *Overview of the year* | *Reviewee’s comments* |
| *Reviewer’s* |
| *Objective 1* |  |
|  |
| *Objective 2* |  |
|  |
| *Objective 3* |  |
|  |
| *Objective 4* |  |
|  |
| *Objective 5* |  |
|  |
| *Objective 6* |  |
|  |

# SECTION B: PLANNING AHEAD

*The reviewee may provide their initial thoughts here in advance of the meeting, or this section may be filled in after the discussion has taken place.*

**Outline up to 4-6 key objectives/goals for next year**

Your objectives can be on many scales, from major long-term projects, to routine business that you wish to sustain at a high level of quality, but think clearly about what will be involved in the coming year

| **Objective** | **Timescale** | **Success criteria** | **Support & resources required: state who is responsible for following up each action** |
| --- | --- | --- | --- |
| *Objective 1* |  |  |  |
| *Add rows as required* |  |  |  |

# SECTION C: YOUR PROFESSIONAL DEVELOPMENT NEEDS

*The reviewee may provide their initial thoughts here in advance of the meeting, or this section may be filled in after the discussion has taken place.*

|  |  |  |
| --- | --- | --- |
| **How do you see yourself or your role developing in the next year and beyond?** Thinking about the main things you would like to achieve in your current role, and your longer term career aspirations, what professional development activities will you undertake to achieve them? (Examples include training courses, study leave, professional and academic conferences, extra qualifications, secondments and new responsibilities, etc.) | | |
| What do you wish to learn / develop? | What would be the outcome for your job or career? | What practical steps will you take to achieve this? Who will follow up? |
|  |  |  |
|  |  |  |
|  |  |  |
| *Note: Add lines as required. Delete this table if you wish to use a less structured approach* | | |

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| --- |
| **Development opportunities and further learning can be found by visiting the following university webpages:**  Development programmes and courses for staff  <https://www.bath.ac.uk/corporate-information/development-programmes-and-courses-for-staff/>  People Management Curriculum  [People Management Curriculum (bath.ac.uk)](https://www.bath.ac.uk/publications/people-management-curriculum/)  Coaching service for staff  <https://www.bath.ac.uk/guides/the-university-of-bath-coaching-service-for-staff/>  Strengthscope  <https://www.bath.ac.uk/corporate-information/strengthscope-profiling-tool/> |

# SECTION D: ADDITIONAL COMMENTS

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| --- |
| Use this section to comment on anything that has arisen out of the discussion that is not covered in the earlier sections, or any unresolved issues that require further action or communication, which you agree to pursue as appropriate.  *Comments by reviewee:*  *Comments by reviewer:* |

Append a separate copy of any comments that the reviewer and reviewee agree may be released to specified individuals for further consideration (eg. Dean of Faculty).

**Section E: Recording and uploading the document in iTrent**

Reviewers / line managers should register the completion of the process through iTrent Manager Self-Service, and should upload the final version of the form to iTrent for secure storage.

Instructions for this process can be accessed from:

<http://www.bath.ac.uk/hr/hrdocuments/itrent-training-guides/sdpr-uploading-update.docx>

The file should be in PDF or MS Word format with a filename in the format: Surname\_First name\_SDPR\_date of meeting (DDMMYY)

e.g. Smith\_John\_SDPR\_281010

When the form has been uploaded, the Senior Reviewer should be emailed to inform them that this has been done.

**By submitting you are confirming that Reviewer and Reviewee have seen this version of the form and agree that it accurately reflects the outcomes of the SDPR meeting, and that the Senior Reviewer has access to the completed form to provide scrutiny and oversight.**

# OPTIONAL SECTION F: SIGNATURES

If you would prefer to sign a printed version of the form, use the box below and upload a **scanned electronic version (PDF)** to iTrent with the filename format as above.

We confirm that we have both seen the completed sections of the SDPR form and that it accurately reflects our meeting, and that the Senior Reviewer has access to the completed form.

|  |  |
| --- | --- |
| **Reviewee** | **Reviewer** |
|  |  |
| *Name* | *Name* |
|  |  |
|  |  |
|  |  |
| *Signature* | *Signature* |
|  |  |
|  |  |
|  |  |
| *Date* | *Date* |

(See section 3.7 of the Scheme Guidance for the role of the senior reviewer)