



Probationary and Developmental Review Objectives for Prize Fellows

The principal aims of the probation and development review process for Prize Fellows are to:

- 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.
- Review performance against the set objectives, provide feedback and identify successes and learning from problems in the achievement of these objectives

This form should enable the reviewer and reviewee to focus their discussion on achievements, performance, aspirations and future plans, and make a record of agreed outcomes and objectives for future reference.

Full Name	
FTE (full time equivalent)	
Department/Institute	
Line Manager	
Mentor	

- On appointment the reviewee will be set objectives for each area of their work by their Head of Department/Division/Institute Director (Section A) and these will be subject to approval by the Dean. Objectives will be specified for each period of probation and development review (i.e. the first 3, 6, 12 and 24 months of appointment) and the support available. Objectives will be forwarded to and approved by the Dean of the relevant Faculty or School at the outset.
- For each probation and development review period the reviewee should provide the reviewer with an account of their progress against the agreed objectives, plus any other activities (Section B).
- The reviewer may make initial comments in Section B and return these to the reviewee in advance of each review meeting.
- Following the review meeting, either party completes the form to record the agreed objectives for the next review period, in consultation with the Dean (Section A), including any support that is required, and the development plan for the reviewee (Section C).
- After any further comments have been added (Section D), the date of the meeting should be recorded and the agreed final form uploaded to the reviewee's iTrent record through Manager Self Service (Section F).

SECTION A – PLANNING AHEAD

All Prize Fellows will be responsible for delivering the following primary objectives during the first two years of their appointment:

- To develop an independent research programme including high-quality and appropriate outputs (usually, journal publications).
- To make individual grant or Fellowship bids (e.g. Royal Society, EPSRC, ESRC Research Leaders, Leverhulme etc.) or to become a member of a team for large research bids, as appropriate, within their first two years.
- To contribute to advanced undergraduate teaching and to supervision, training and research of graduate students.
- To engage with PhD student supervision, possibly through obtaining a Studentship.
- To develop international research links, including possibly spending up to 3 months at overseas research universities.
- To undertake personal and professional development.
- To promote research in the discipline, including public engagement.

The reviewer will need to set specific achievable objectives under each of the primary objectives above for each review period and outline what support is available.

Objective	Timescale	Success criteria	Support & resources required: state who is responsible for following up each action
<i>Objective 1</i>			
<i>Add rows as required</i>			

	Name	Signature	Date
Prize Fellow (Reviewee)			
Head of Department/Division/Institute Director (Reviewer)			
Dean of Faculty/School			

SECTION B – PERFORMANCE AGAINST OBJECTIVES

Section B should be used for each review period. The reviewee should record their reflections here and pass the form to the reviewer in good time for the probation or developmental review meeting.

Under each of the relevant objectives under review, the reviewee should comment on what progress they have made against them, and outline any additional achievements, duties or responsibilities that they wish to highlight and reflect on.

Be *selective* – the reviewee should not just list everything they did but the things that it's useful to reflect upon – and *evaluate* why things went well or were difficult, and what lessons they have drawn from the experience.

Objective / activity	Comments
<i>Overview of the review period</i>	<i>Reviewee's comments</i>
	<i>Reviewer's comments</i>
<i>Objective 1</i>	
<i>Objective 2</i>	
<i>Objective 3</i>	
<i>Objective 4</i>	
<i>Objective 5</i>	
<i>Objective 6</i>	

SECTION C – 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?
<i>Note: Add lines as required. Delete this table if you wish to use a less structured approach</i>		

SECTION D – ADDITIONAL COMMENTS

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:

SECTION E - DECLARATION

	Name	Signature	Date
Prize Fellow (Reviewee)			
Head of Department/Division/Institute Director (Reviewer)			
Dean of Faculty/School			

SECTION F: RECORDING AND UPLOADING THE DOCUMENT IN ITRENT

The reviewers 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. In academic departments, Department Co-ordinators typically do this for Lecturers, Senior Lecturers, Readers and Professors. Instructions for this process can be accessed from:

<http://www.bath.ac.uk/hr/learning/sdpr/index.html>

The file should be in PDF or MS Word format with a filename in the format: Surname_First name_PFPDR_date of meeting (DDMMYY)

e.g. Smith_John_PFPDR_281016

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 development review meeting.

Guidance

[Probation policy and procedure](#)

[University's Staff Development Performance Review and Career Conversation guidance](#)

[Career progression in the Education and Research job family framework](#)

Next steps

Once agreed and signed by all parties, the Dean should send a copy of Section A of this form to the HR Administration Co-ordinator:

k.h.weeks@bath.ac.uk.

Further support

The [Centre for Learning & Teaching](#) provides a comprehensive programme of development opportunities for research staff and academics, further details.

The Researcher Development Framework: [The Researcher Development Framework: Professional development framework for researchers](#)
[The Development Toolkit: an online learning and development resource for staff](#)