



PERFORMANCE DEVELOPMENT REVIEW POLICY

Rev	Date	Purpose of Issue/Description of Change		Review Date
1.1	March 2014	Update: review names and terminology		
Policy Officer		Senior Responsible Officer	Approved By	Date
Director of HR		Deputy Director of HR	Human Resources Task Group	March 2014

PERFORMANCE DEVELOPMENT REVIEW POLICY

1 INTRODUCTION

Bangor University's Performance Development Review scheme is founded on the belief that all staff have a right to a clear understanding of the University's expectations of them and an opportunity to discuss and agree their contribution to the achievement of the University's goals.

2 AIMS OF REVIEW

The Performance Development Review Scheme aims:

- to bring staff and reviewers together on a regular formal basis, to review roles, expectations and development.
- to identify strengths and contributions made by staff to the University.
- to agree an individual's key objectives to ensure that all staff make an effective contribution to the achievement of the University's overall aims and objectives.
- to identify and support the continuing professional development needs of staff.
- to provide an opportunity for individuals to reflect on what they are doing and how they might wish to contribute in the future.
- to encourage effective communication within the University.

3 KEY PRINCIPLES OF REVIEW

- The Performance Development Review scheme is a positive process which should benefit the individual, the College / Department, and the University.
- The review process must be carried out within the context of the University's / College / Departmental strategic objectives, and its overriding aim of attaining excellence.
- Every member of staff participates in the process on an annual basis.
- The process is guided by the University's Equal Opportunities Policy and other relevant University and HR policies.

- It is developmental in approach, by assessing an individual's need for training and development.
- That all records are kept secure and confidential and shared only with members of the Remuneration Committee as part of the Reward and Recognition process as necessary.
- That it provides staff with the opportunity to comment on the effectiveness of their managers and supervisors.
- The review process is firmly based on the premise that all staff perform their work better, and with greater job satisfaction, when;
 - They know, and can agree with, what is expected of them.
 - They receive feedback on their work from managers and colleagues to whom they are accountable.
 - They can raise concerns and identify constraints without fear of recriminations.
 - They receive support and guidance to achieve agreed objectives.
 - There is an opportunity for self-development and career progression.

4 LINKS TO OTHER UNIVERSITY PROCESSES AND POCEEDURES

- The scheme is not a substitute for the on-going dialogue and feedback which is a normal feature of good management practice. Where there are matters of concern, or poor performance, these should be addressed promptly and at the time they arise, and not left to the review meeting before being raised.
- The Performance Development Review is not and *should not be used as a disciplinary meeting or a meeting to raise performance issues for the first time*. Any performance issues should be dealt with supportively within the normal management processes and through the University's Capability Procedure.
- Discussions can be raised regarding the member of staff's workload and any stressful circumstances affecting their performance. In this way the performance development review process can initiate and review any action and/or undertake the adjustments deemed necessary to address these issues.
- With the agreement of the individual the Performance Development Review Scheme can inform other processes such as Pay Progression within Grades and Contribution Related Pay.

5 SCOPE

The Review process is mandatory for all staff, both full-time and part-time.

In terms of staff that have undertaken maternity leave had a career break or secondment it is essential that these staff receive a Performance Development Review as soon as possible on their return to their normal duties. This is to ensure that their return is fully supported and that they are clear about any potential changes that have occurred within the scope of their role.

Reviews must be held for part time staff to ensure that they are fully included in relevant College / Departmental communications relevant to new aims and objectives.

In some areas where individuals work in teams and have exactly the same roles and responsibilities and have team objectives and measures, members of staff can be reviewed as a team (see Guidelines for Team Review). However, if a member of staff wishes to receive an individual review the manager must ensure that this is provided.

6 TIMING

Reviews should be undertaken between the 1st of March and the 30th of September.

7 ROLE AND RESPONSIBILITIES

The role of the Executive is to:

- Ensure that the process is conducted in accordance with the scheme's objectives and is carried out fairly and equitably.
- Communicate to the Deans of College and Departments the key aims for the University, particularly for the review period so that these can be cascaded throughout the University to ensure that all staff are aware of the University's overall objectives and understand their role in achieving those objectives.
- Evaluate the effectiveness of the scheme in the University.

The role of the Deans of College / Department is to:

- Ensure that all staff are reviewed on an annual basis that the process works effectively in the College / Department.
- Ensure that the process is conducted in accordance with the scheme's objectives and is carried out fairly and equitably.
- Communicate to the Reviewer's the key issues for the University, College / Department that need to be communicated and discussed in the reviews.
- Evaluate the effectiveness of the scheme in their College / Department and take action if issues emerge.

The role of the reviewer is to:

- Work with the reviewee to agree on a set of objectives for the following year.
- Provide guidance to the reviewee.
- Identify training and development needs to assist in achieving identified objectives and overall career development aims.
- Evaluate success in achieving previous objectives and performance
- Be open to receive and provide relevant feedback.

The role of the reviewee in this process is to:

- Work with the reviewer to agree on a set of objectives for the following year.
- Identify training and development needs to assist in achieving identified objectives and overall career development aims.
- If appropriate, following consultation with the Reviewer, take responsibility for identifying and arranging development opportunities.
- Reflect on performance and achievement of previous objectives.
- Be open to receive and provide relevant feedback.

The role of the HR Department and HR Task Group is to:

- Provide training for all involved in the process.
- Ensure that the scheme is carried out according to the outlined procedure and is carried out fairly and equitably.
- Update and review the scheme as necessary.

8 DOCUMENTATION AND REPORTING

- Copies of all forms should be retained by the Reviewer and the Reviewee.
- Academic staff should also forward a copy of the form to the relevant Academic Head.
- Forms relating to Academic Heads and members of the Executive will be retained in the Vice-Chancellor's Office. Forms relating to Directors of Central Departments will be held by the relevant member of the Executive.
- The Personal Development Plans should be sent to the Staff Development Team in HR.

9 CONFIDENTIALITY

Review documentation must be kept in accordance with the Data Protection Act 1998 and should remain within the College / Department and should remain confidential, as far as possible to the Reviewee, Reviewer and the Head of College / School / Department.

If a manager recommends a member of academic staff for consideration by the Remuneration Committee the relevant performance development review documentation will be shared, in confidence, with members of the Remuneration Committee. This information will only be shared with the agreement of the relevant individual.

10 PERFORMANCE DEVELOPMENT REVIEW TRAINING AND BRIEFING

Training and guidelines will be provided by the HR Development Team. The HR Development Team will contact all Colleges / Departments to discuss the most appropriate and effective way of providing support for the scheme in their Colleges / Departments.

All Reviewers should attend a relevant workshop before undertaking their responsibilities as a reviewer and all new reviewees should attend Performance Development Review training.