

## STAGES IN THE STAFF REVIEW AND DEVELOPMENT PROCESS<sup>1</sup>

Stage	Content	Process
<b>STAGE ONE: PREPARATION</b>		
<b>a) Planning</b> Preparing for the discussion	A confidential review of the last year and planning for the next period of review.	The member of staff concerned completes a preparatory review of progress.  The reviewer plans for the discussion by completing a similar review of the member of staff's progress. Also, the reviewer specifies what documents the member of staff needs to bring to the review meeting and gathers together information on the University's and institution's objectives.
<b>b) Agenda</b> Setting the agenda for the meeting	Both the reviewer and the member of staff list what they would like to discuss at the meeting	The member of staff identifies issues that he or she would like to discuss with the reviewer and lists them. This list may be passed to the reviewer to add additional items that he/she would like to raise, photocopy and return it to the member of staff.
<b>STAGE TWO: DISCUSSION</b>		
A review meeting takes place	Reviewer and member of staff discuss the member of staff's progress over the review period, training and development needs and agree on Action Plan for the future.	1) The formal framework for the meeting is in accordance with the institution's scheme. 2) A constructive, two-way open discussion takes place. 3) Actions resulting from the review are agreed, to be recorded after the meeting.
<b>STAGE THREE: RECORDING</b>		
<b>a) Outcomes</b> Recording the decisions and outcomes from the meeting	The discussion and/or the decisions are recorded, including action plans and training needs. These remain confidential to the member of staff concerned and reviewer and the Head of Institution	1) The documents may be completed by either party so long as it is seen and signed by both. They must be signed by the Head of Institution (or his/her nominated representative if the Head is not the reviewer). 2) Both the member of staff and the reviewer are given copies of the completed documents. 3) CPPD may be given a copy of the individual statement of agreed training and development outcomes, if this has been agreed with the member of staff.
There are additional processes which may take place at institutional level:		
<b>b) Summary</b> Listing and analysing the overall institutional needs	Reviewers draw together the issues identified in individual reviews.	Each reviewer produces a summary of the generic issues identified in the review he or she has completed, and passes them to the Head of Institution or his/her nominated representative, with suggestions for overcoming them. (This summary <b>must</b> be anonymous and <b>must not</b> refer explicitly or implicitly to any members of staff.)
<b>c) Institutional response</b> Producing an institutional summary	The Head of Institution confirms that the process is completed and identifies any training needs needing central action.	Head or designated person co-ordinates all reviewer summaries to produce an overall institutional summary. This may be discussed at a meeting of all reviewers and fed back to staff generally to let them know in summary what issues have emerged and what steps are being taken to address them.  CPPD may be informed of some generic training needs so that it can assist in meeting them and also so that they can plan future University training activity appropriately.

<sup>1</sup> Taken from Annex 2 of the Joint Report of the Council and the General Board on a revision of the arrangements for appraisal, *Reporter*, 2003-04, 15 Dec 2003.