



University of
St Andrews

Review and development scheme (RDS) for Professional staff

Document type	Policy
Scope (applies to)	Professional staff
Applicability date	22/10/2023
Review / Expiry date	28/02/2025
Approved date	23/10/2023
Approver	Deputy Director of Human Resources
Document owner	Human Resources Officer
School / unit	Human Resources
Document status	Published
Information classification	Public
Equality impact assessment	None
Key terms	Staff/Progression and development/Performance Management
Purpose	Outlines the procedure to manage the annual performance and development review for support staff.

Version number	Purpose / changes	Document status	Author of changes, role and school / unit	Date
1.4	Added Mediation contact at section 11.	Published.	Lisa Stewart HR	23/10/2023

Table of contents

1.	Introduction	3
2.	Purpose of RDS	3
3.	Scope	3
4.	Principles	3
5.	Roles and responsibilities	4
6.	Part-time employees	4
7.	Fixed term and standard employees	4
8.	Absence during RDS	4
9.	Performance management	5
10.	RDS process	5
11.	Support	5

1. Introduction

- 1.1 It is important that all roles within the University support the delivery of the University's strategy and that every employee is aware of how they contribute to the overall success of the University. The Review and Development Scheme (RDS) has been designed to support this aim by providing a mechanism for discussion.
- 1.2 A key objective of the Review and Development Scheme (RDS) is to provide an opportunity to have a formal constructive two way discussion between a manager and an employee that not only sets objectives for the coming review period but reflects on the previous 12 months, along with providing the opportunity to discuss training and development requirements.
- 1.3 Annually, Human Resources (HR) will remind Heads of School/Unit of the process, asking them to confirm their preferred timetable for completion (January–June/June–December).

2. Purpose of RDS

- 2.1 The key objectives of RDS are:
- To have a formal constructive two-way discussion between manager and employee annually.
 - Review the past year, providing feedback, identifying successes, and learning from problems in the achievement of last year's objectives.
 - To agree realistic goals for the future, taking into consideration the objectives and values of the School/Unit/University, the knowledge, skills and attitude of the employee and their career development aspirations.

3. Scope

- 3.1 This policy applies to all professional services staff on completion of their probation period.

4. Principles

4.1 The principles of RDS are:

- Once an employee completes their probation period, they should agree objectives with their line manager, which will be assessed in line with this policy.
- The process should take place annually (January/June or June/December).
- RDS allows the employee's (reviewee) personal contribution to be aligned to the School/Unit objectives through on-going dialogue with their line manager (reviewer).
- The meetings allow a regular opportunity to discuss the reviewee's strengths, concerns, aspirations at work, and identify training and development needs.
- RDS meetings will be held in confidence and any issues raised should be dealt with immediately and if necessary, the reviewer should seek advice from their Head of School/Unit (or appropriate delegate) and/or their [HR Business Partner \(HRBP\)](#).

5. Roles and responsibilities

5.1 Head of Unit / School (or appropriate delegate)

5.1.1 The Head should:

- Oversee RDS within their School/Unit.
- Assist Reviewers in communicating the School/Unit strategy so that they can be used effectively within the RDS discussions.
- Ensure that all Reviewees have, at the end of the review process, appropriate objectives agreed on their current [RDS form](#).
- Ensure that any concerns regarding performance are addressed immediately.

5.2 Reviewer

5.2.1 The reviewer should:

- Distribute the necessary [RDS form](#) and schedule regular meetings with the reviewee.
- Ensure that meetings are conducted in a manner that meets the needs of both the reviewee and reviewer, and allows the reviewee to evidence any relevant feedback on their performance and contribution during the last 12 months.
- pass the completed and agreed forms to the Head of School/Unit (or appropriate delegate) once the RDS meeting is concluded.

5.3 Reviewee

5.3.1 The reviewee should:

- Complete the [RDS form](#) prior to the meeting by reviewing the last 12 months and consider their objectives and training needs for the forthcoming 12 months.
- Where appropriate, in the periods between reviews, the reviewee should provide updates to the reviewer in line with the dates set against any objectives.
- The reviewee should raise any difficulties they have in meeting agreed objectives with the reviewer and/or Head of School/Unit (or appropriate delegate) at the earliest opportunity.

6. Part-time employees

6.1 While RDS will operate on an annual basis and apply to all staff, the objectives agreed should recognise those that work part-time and/or part year. Any changes to the objectives as a result of an agreed change in working pattern should not imply a reduction in the quality of performance or contribution to the School/Unit objectives.

7. Fixed term and standard employees

7.1 RDS applies to both standard appointments and fixed term appointments to ensure that the progress and performance of fixed term staff are assessed against the same standards and expectations which apply to those on standard contracts.

8. Absence during RDS

8.1 Where a member of staff is absent during the RDS period, for example, on family leave or extended sickness absence, their objectives will be carried forward to the next RDS period. However, care must be taken not to overburden the employee on their return to work and the workload including objectives must be reasonably achievable.

9. Performance management

- 9.1 The reviewee will normally be expected to meet all of the agreed objectives in the relevant timescales in order to contribute effectively to the operational needs and strategic aspirations of the School/Unit.
- 9.2 The reviewer is expected to meet with the reviewee at regular intervals to ensure that they are meeting their objectives. If the reviewee is failing to meet all or some of their objectives without good reason, the line manager should initiate the University's [Poor Performance \(Capability\) Procedure](#) in consultation with the [HRBP](#).

10. RDS process

Stage 1	Reviewer completes Section A & B of form and issues to reviewee prior to the meeting.
Stage 2	Reviewee completes Section C and F and updates Section E if objectives set for previous year. This is passed back to the Reviewer in advance of the meeting.
Stage 3	RDS Meeting: <ul style="list-style-type: none">Reviewee and reviewer discuss role and current objectives, and any issues experienced.Both parties must agree future objectives, timescales including any interim review periods (if relevant), and training/development needs.
Stage 4	After RDS Meeting: <ul style="list-style-type: none">Reviewer completes Sections D – E.Form signed off by reviewee and reviewer and passed to Head of School/Unit (or appropriate delegate).Reviewer along with Head of School/Unit (or appropriate delegate) should consider Training and Development needs and if necessary seek advice from OSDS.

11. Support

- 11.1 In the event that an employee requires assistance or guidance beyond their School/Unit, they are encouraged to reach out to a staff member within the following employment services: [HRBP](#), [Mediation Service](#), [EDI](#), [Trade Union](#) or the [Chaplain](#).

Version number	Purpose / changes	Document status	Author of changes, role and school / unit	Date
1.0	Migration of the policy to Governance Zone.	Published	Lisa Stewart HR	03/07/2019
1.1	Change to review date only.	Published	Lisa Stewart HR	07/06/2021
1.2	Amend broken link to RDS form.	Updated	Lisa Stewart HR	16/09/2021
1.3	New section added: "Scope", and link to RDS form fixed.	Published.	Lisa Stewart HR	01/03/2023
1.4	Added Mediation contact at section 11.	Published.	Lisa Stewart HR	23/10/2023

