**Be At Your Best Plan**

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| **Name:** |  | **Directorate:** |  |
| **Job Title:** |  | **Performance Year:** |  |

Our vision is to make sure that **students have the power and opportunity to transform their time at Durham**. To achieve our vision and goals we **champion every Durham student**.We’re interested in the things that matter to them. We stand up for their rights. We bring them together. We celebrate their success.

Our Be At Your Best framework and plan helps us to do just that. Part A of your ‘Be At Your Best Plan’ should be jointly agreed within your manager in the first month after you have joined us. Once agreed, Part A of this plan will set out what is expected of you throughout your probation period in relation to your role, your behaviours, your objectives and your personal development. The plan is designed to be a live document that you and your manager can use to track your progress throughout your first 6-months at monthly 1-2-1s as well as at your probation review. Part B is to be completed by you in advance of your probation review meeting. Once you have completed your probation period, you will complete a new ‘Be At Your Best’ plan and will transition into our usual performance review cycle. To understand more about our approach to performance and the performance cycle, you should read our guide for colleagues.

Performance at Durham Students’ Union

There are four elements of performance at Durham SU and this document will help you and your manager to agree expectations and track progress for each element:

1. **Your role** – are you fulfilling all of the requirements and responsibilities of your job description?
2. **Your behaviours** – are you visibly living the values and working towards displaying the right behaviours?
3. **Your objectives** – how are you progressing against your agreed objectives for the year?
4. **Your personal development** – have you got all the knowledge, skills and experience required for your current role and what are your aspirations for the future?

Each of these four performance elements are equally important and your manager will be key in coaching you to perform well across all four areas.

This plan should be completed and emailed to the Executive Assistant twice a year. Firstly, after Part A is completed and your objectives and personal development have been agreed for the year ahead. Secondly, it should be sent through again after your probation review meeting once your comments and your managers comments have both been added to the document.

PART A: LOOKING AHEAD AT THE NEXT 6-MONTHS

1. Your role

The requirements and responsibilities of your role are central to understanding what is expected of you and these can be found in your job description. To be performing well in this area, you should be fulfilling the overall purpose of the role and visibly demonstrating the main responsibilities of the job description. You should make sure that you and your manager are happy that your job description is up to date.

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| Copy and paste your job description here: |
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**2. Your behaviours**

Our behaviours are important as they describe ‘how’ we will deliver our work so that we all behave in a way that is consistent with our purpose and values. They help us to provide a great experience for students, colleagues, volunteers and external stakeholders. Our values framework sets out expectations for how we will bring the values to life.

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|  | **We champion students** | **We’re proud of Durham** | **We make the future better** |
|  | *We’re a student rights organisation. Our collectivism makes us stronger. We know students make the best decisions about things that affect them. We trust our members.* | *We always recognise success but we always strive for better. Our collegiate University means we do things differently here. We like that.* | We’re a students’ union with a purpose. We’re relentless in pursuit of our mission. We make change for students, with students, in their interests. |
| **Behaviours for ALL** | * Works collaboratively with students to help them make their ideas better. * Tries to say yes to students and their ideas. When can’t, explains why and gives alternatives. * Where possible, encourages / empowers students to lead. * Questions how work is adding value for students. * Makes time to talk to students about their experience and views of the Students’ Union. * Celebrates student successes and achievements. * Bases decisions and priorities on evidence about students rather than assumptions. | * Is inquisitive about Students’ Union and University events and activities and attends, when appropriate. * Takes time to find out about our successes and share them with others; * Builds understanding about the Union and University. * Proactively works to make Durham better. * Respects the diversity of Durham – both the people and its communities. * Uses positive language to describe the University and Students’ Union publicly. | * Gives praise and positive feedback to colleagues when things go well. * Learns from past mistakes and issues but don’t get stuck and dwell. * Clear about priorities and how they impact on overall aims. * Plans and delivers effectively. * Open and supportive about change. * Willing to constructively challenge if there might be better options or decisions available. * Experiments and suggests new ways of doing things. * Takes personal responsibility for solving problems / issues. |
| **Behaviours for LEADERS** | * Is comfortable with the complexity of officer / student leadership alongside professional leadership. * Is willing to challenge student leaders but always respects their final decisions and choices. * Ensures channels for member feedback to inform work. * Works hard to balance the interests of the majority with those that are disempowered / underrepresented. * Challenges those that don’t champion students; * Remembers that we’re also here to represent the students that don’t get involved. * Clarifies boundaries for acceptable student behaviours. | * Acts as an ambassador in Durham spaces and shares successes / achievements regionally and nationally. * Builds collaborative, long-term relationships with the University, students, community and stakeholders. * Is interested in, and supportive of, the things that make Durham unique (i.e. our Collegiate system). * Knows and educates self on the University. * Champions diversity and inclusion across the Students’ Union and University. * Treats people equitably, and acts as a facilitator when colleagues experience conflict. | * Articulates a positive and realistic vision for the future, communicating optimism and enthusiasm. * Creates a culture of evaluating our outcomes / impact. * Successfully manages and implements change. * Ensures effective goal setting and planning within teams. * Actively removes obstacles and barriers to others’ success. * Takes calculated and managed risks. * Takes an active interest in, and cares about, every team’s success and looks for ways to help. * Fosters and encourages creativity. * Takes tough decisions addressing performance if needed. |
| **To be AVOIDED** | * Takes credit for what students (or others) have done. * Patronises students or treats them like children. * Makes generalisations and stereotypes. * Infantilises or rationalises the student interest. * Demonstrates a lack of transparency in own work. * Complains publicly about student behaviour. * Talks about our internal priorities all the time. * Dismisses feedback or keeps to self rather than sharing. | * Mocks the University or students publicly. * Blames failure on our University / student context. * Allows future ambitions and plans to detract from achievements. * Fights the University and other groups rather than negotiating or engaging. * Says that we can’t learn or change. * Is disrespectful to / about the local community. * Is inflexible about way of doing things. | * Refers back to past problems too often. * Blames people or shouts rather than treating mistakes as learning opportunities. * Changes things for the sake of it, without clear aims. * Focuses on the short-term rather than long-term. * Acts solely in own personal interests. * Moans about challenges and difficulties. * Seeks excuses rather than solutions. * Expects behaviours without setting personal example. |

**3. Your probation period objectives**

Objectives describe the areas of key focus in your role within a performance year. Demonstrating a clear line of sight to the strategy, they should be realistic whilst providing stretch for you to continually develop. You should have no more than five objectives for any performance year. Objectives need to be SMART – specific, measurable, achievable, relevant and time-bound – your manager will coach you to produce SMART objectives. Once agreed, you should update your progress at your regular 1-2-1s.

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| --- | --- | --- | --- | --- |
| Link to Plans  Which strategic goal does this contribute to? | Objective  What will be different as a result of achieving this objective? | Actions required  What actions will you take to achieve this? | Success measures / KPIs  How will you track and measure your progress? | Timescale  When does this need to be achieved by? |
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| What does good progress feel like by the end of your probation period? |
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**4. Your personal development plan**

Based on your review of your job description, values and having set your objectives, you should consider what areas of development you wish to focus on during your first 6-months. It may be a skill or knowledge that you need to work on to support your job description or it could be an area of development identified in your interview.

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| --- | --- | --- | --- | --- |
| Area for development  Skill, knowledge or behaviours | Actions required  What actions will you take to achieve this? | Success measures  How will you track and measure your progress? | Timescale  When does this need to be completed by? | Progress  Make notes on your progress throughout the year |
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**5. Your 1-2-1s**

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| Part two:  1-2-1s and performance reviews |

As a minimum you should expect monthly 1-2-1s with your manager. When your probation review meeting is held, this may replace your regular 1-2-1. This section of your plan allows you to capture key points or actions from any of your monthly 1-2-1s across the year. You should use it like a notepad to capture a couple of bullets in each section, as it should be more about the quality of your conversations with your manager than documenting every word in the conversation.

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| **Month** | **Highlights**  What’s going well, feedback on strengths, key achievements | **Lowlights**  What’s not gone so well and key learning points | **Support needed**  Actions for your manager | **Outputs from 1-2-1**  Actions for you |
| Aug |  |  |  |  |
| Sept |  |  |  |  |
| Oct |  |  |  |  |
| Nov |  |  |  |  |
| Dec |  |  |  |  |
| Jan |  |  |  |  |
| Feb |  |  |  |  |
| Mar |  |  |  |  |
| Apr |  |  |  |  |
| May |  |  |  |  |
| June |  |  |  |  |
| July |  |  |  |  |

**PART B: YOUR 6-MONTH PROBATION REVIEW**

**5.1. Performance against your role**

Review your job description and consider honestly whether you feel you are fulfilling the overall purpose of the role and demonstrating the main duties and responsibilities. In your probation review meeting, your manager will use your job description as the basis of this discussion and may ask you for specific examples against some parts of it.

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| What are your key achievements in your first 6-months?  What are you most proud of? | What areas could have been improved in your first 6-months in the role?  What has been your biggest challenge? |
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| **Is the role what you expected? What additional support can your manager provide to help you improve your role performance in the future?** | |
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Your view on your performance against your role:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

Your manager’s view on your performance against your role:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

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| Manager’s comments (including key strengths and areas of improvement): |
| To be completed by your line manager. |

**5.2. Performance against values**

You should assess yourself against each value bearing in mind the plans you discussion in Section 2, as well as the definitions below. Your manager will do the same, and then you should discuss any similarities and differences in your review meeting – this will include discussing examples that support your proposed ratings.

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| **VALUES** | **YOUR VIEW** | | | | **MANAGER’S VIEW** | | | |
|  | Outstanding | Good | Satisfactory | Poor | Outstanding | Good | Satisfactory | Poor |
| **We champion students -** We’re a student rights organisation. Our collectivism makes us stronger. We know students make the best decisions about things that affect them. We trust our members. |  |  |  |  |  |  |  |  |
| **We’re proud of Durham -** We always recognise success but we always strive for better. Our collegiate University means we do things differently here. We like that. |  |  |  |  |  |  |  |  |
| **We make the future better -** We’re a students’ union with a purpose. We’re relentless in pursuit of our mission. We make change for students, with students, in their interests. |  |  |  |  |  |  |  |  |

**Outstanding =** Always demonstrates positive behaviours consistently. Is a role model for this value.

**Good =** Mostly demonstrates positive behaviours in line with this value, and on rare occasions where they don’t is self-aware enough to acknowledge, learn and apologise.

**Satisfactory =** Usually demonstrates positive behaviours, but some behaviours cause concern and if not addressed could become a performance problem in the future.

**Poor =** Whilst some positive behaviours may be displayed, reoccurring warning signs are demonstrated and cause significant performance concerns. May require a performance plan.

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| Your comments (including key strengths and areas of improvement): |
| To be completed by you. |

Your overall view on your performance against the values:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

Your manager’s overall view on your performance against the values:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

|  |
| --- |
| Manager’s comments (including key strengths and areas of improvement): |
| To be completed by your line manager. |

**5.3. Performance against your objectives**

You have been capturing progress against your objectives in part one of your Be At Your Best plan. Reflect on your progress and consider the below questions.

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| Objective  What did you set out to achieve? | Summarise your progress overall  Have you achieved the success measures and KPIs you set out to within the timeframe agreed? What has worked and what hasn’t? | Achieved?  Fully, partially, not achieved or exceeded? |
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Your view on your performance against your objectives:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

Your manager’s view on your performance against your objectives:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

|  |
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| Managers comments (including key strengths and areas of improvement): |
| To be completed by your line manager. |

**5.4. Performance against your personal development plan**

You have been capturing progress against your personal development in Part A of your plan. Reflect on your progress and consider the below questions.

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| **To what extent have you met the learning objectives that you set out to?** | **How has your learning benefitted your current role?** |
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| **How has your learning benefited the organisation and/or our members?** | **What is your biggest learning point during your first 6-months?** |
|  |  |

Your view on your performance against your personal development:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

Your manager’s view on your performance against personal development:

1 = Poor  2 = Satisfactory  3 = Good  4 = Outstanding

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| Managers comments (including key strengths and areas of improvement): |
| To be completed by your line manager. |

5.5. Your manager’s performance

As you know, our values are really important to us and our leaders and managers have a crucial role to play in role modelling our values. To support your manager’s performance and development please provide some feedback below.

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| **What is your manager great at?** | **What would you like to see your manager do differently?** |
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| Manager’s comments: |
| To be completed by your line manager. |

**5.6. Summary**

Any final thoughts or conclusions on your performance throughout your probation period?

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| Your final comments: | |
|  | |
| Your signature: | Date: |
|  |  |

**For completion by your manager AFTER your probation review meeting**

Overall performance rating:

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| --- | --- |
| Overall Proposed Performance Rating | Probation Outcome |
| N/A – you are in your probation period  Poor / Unacceptable = You are under-performing against the expectations of your role and a performance improvement plan is required. Your  performance scores total 8 or less OR your performance is unacceptable in any single area.  Satisfactory = You are achieving expectations in most areas and your outputs and behaviours are to a reasonable standard, however there is still  potential for development and improvement. Your performance scores total 9-11 overall and you must be at least satisfactory in ‘behaviours’.  Good = You are performing consistently well across the four performance elements: your role, objectives, behaviours and your personal development.  Your performance scores total 12-14 overall and you must be at least ‘good’ in ‘behaviours’.  Outstanding = You are demonstrating excellent levels of performance across all four performance elements and consistently exceed expectations. You  are widely considered to be a role model for others. Your performance scores total 15-16 overall and you must be outstanding in ‘behaviours’. | Employee has passed their  probation.  Probation extended (up to a  maximum of a further 3-months).  Employee has failed their  probation. |

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| Manager’s final comments (including key strengths and areas of improvement): | |
| To be completed by your line manager. | |
| Manager’s signature: | Date: |
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After successful completion of the probation period, the employee should transition into the standard Be At Your Best cycle. If the probation period is completed in August to December, the employee should complete a new Best At Your Best plan with an end of year review at the end of the current performance year (therefore objectives that last 7- to 12-months). If the probation period is completed in January to July, the employee should complete a new Be At Your Best plan with an end of year review in the following performance year (therefore objectives that last 13- to 18-months).