**Review and Career Conversation**

|  |  |
| --- | --- |
| **Name:** |  |
| **Job Title:** |  |
| **Department:** |  |
| **Directorate:** |  |
| **Reviewer:** |  |
| **Date of Review:** |  |



**Getting the most from my conversation**

This document has been designed to provide you and your reviewer with the structure for a conversation. Whilst the quality of the conversation is the primary consideration, there also sections for you to record information, evaluate progress, and self-assess yourself. The conversation enables you to focus on your needs as an individual, to review your progress against goals and objectives, and to receive feedback on how you’ve been working. It also provides you with the opportunity to reflect upon your career and have an honest conversation about your hopes and aspirations for the future. Given these factors are continuously changing it is recommended that these elements of these conversations form part of an ongoing dialogue with your reviewer and occur at least once a quarter.

**About this document**

**About me**

Use these pages to help you review what you’ve been doing and how effectively you’ve been going about it. The first page is designed to help you evaluate your progress against development goals and work objectives. Start by summarising the goals agreed during your last conversation. You and your reviewer can then use the rating scale to indicate the extent to which these have been or are being met. When you have done this, you may want to agree which of the ongoing goals you wish to include when you reach section 5.

The second page provides you with the opportunity to review your style, approach and behaviour. This is designed not just for self-reflection, but also as an opportunity for you to receive feedback from your reviewer and ideally others that you interact with. Once completed this can provide you with the insights required to build self-awareness and guide you towards specific development goals.

**Reviewing my goals and objectives**

**&**

**Reviewing my behaviour**

This section has been designed to support everyone regardless of their aspirations, to reflect upon where they are up to within their career and to think through their hopes and needs in the short and longer term.

For those considering another role now or at some point in the future, you have the opportunity to review your current motivation and potential in section 4.1. This simple self-reflection tool gives you the opportunity to reflect at a given point in time on your appetite and potential to move to another role. You may also find it helpful to ask your reviewer / others to give you some feedback on these criteria. It is helpful at this stage for you and your reviewer to summarise your conclusions together with other information from the conversation in section 4.2.

**Reviewing my career**

Use this page to help you reflect upon how satisfied you are within your role, how well this fits within your life and the impact this has on you. Start by indicating where you are on each of the 6 scales and then take some time to reflect upon your scores. Next, give some thought to the practical steps that you could take over the next 2 – 3 months that would make a make noticeable difference to your quality of life in and out of work. You may find it helpful to consider how your manager, colleagues, friends or family could support you in taking these steps. Also be sure to include any goals that relate to the workplace in section 5 when agreeing your development goals.

**Agreeing my development goals and work objectives**

Whilst progressing through the conversation you will have identified / agreed short and longer term goals; this is the place to capture and record these. Aim to agree and summarise the most important goals and priorities so that you have no more than 8 split between the short and longer term sections. Depending upon the nature of your role or the type of development priorities you may want to substitute some of your longer term goals for short term or vice versa. Treat development goals with the same importance as work objectives including a combination of each and aiming to make your goals **S**pecific **M**easurable **A**chievable, **R**elevant and **T**imebound. Finally, ensure when you finish the conversation that you and your reviewer have your next conversation scheduled and in the diary.

1. **About me**

Use this page to reflect upon your satisfaction with your role and to consider the balance between your work and personal life. Indicate below how much each of these employment needs are met within your current role.

☹

😐

☺

2. How realistic and manageable I find my workload

☹

😐

☺

1. How fulfilled I am within my current role

☹

😐

☺

5. The quality of relationship I have with my manager

☹

😐

☺

6. My clarity of purpose and sense of direction

☹

😐

☺

3. How equipped and confident I am to do my job

What are you most passionate about and what do you find most rewarding and energising?

How much opportunity is there for you to work in these areas?

☹

😐

☺

4. The quality of relationships I have with my colleagues

What would make the greatest difference to my overall satisfaction and fulfilment at work during the next few months.

1. **Reviewing my goals and work objectives**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Progress on short term goals and work objectives**  List the key objectives that you have recently achieved or are currently working on. Indicate for each the extent to which you are meeting or have already met the agreed expectations. Take some time to reflect for each of these about the extent to which they have (or have not) played to your strengths and about the relative energy and passion with which you have approached them. Include ratings from you (with a ✓) and your reviewer (with a 🗶). | | **Partially or not met / meeting** | **Met or meeting** | **Exceeded / exceeding** | **Not**  **Applicable** |
| 1. | |  |  |  |  |
| 2. | |  |  |  |  |
| 3. | |  |  |  |  |
| **Progress on longer term goals and work objectives** - List the longer term goals and objectives you have been working on over the last 6 – 12 months. Indicate for each the extent to which you are meeting or have already met the agreed expectations. | |  |  |  |  |
| 1. | |  |  |  |  |
| 2. | |  |  |  |  |
| 3. | |  |  |  |  |
| **Reflections and comments** Count the ratings in each of the above columns. The column with the most ticks should be used for your overall rating. If you and your reviewer have different scores please explore why and summarise your conclusions below. | |  |  |  |  |
|  | **Your overall rating:** |  |  |  |  |
|  |  |  |  |  |
| **Reviewers overall rating:** |  |  |  |  |
|  |  |  |  |  |

1. **Reviewing my behaviour**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| To review your behaviour, you and your reviewer each need to evaluate how frequently you display the behaviours described below. Remember, differences in perception / observation are not only normal, but add to the value of the conversation. Include ratings from you (with a ✓) and your reviewer (with a 🗶).   * *Consistently –* you display this behaviour a lot / most of the time * *Some of the time –* you display this behaviour some of the time * *Rarely –* you rarely display this behaviour | | Rarely | Sometimes | Consistently |
|  |  |  |  |  |
| Org value 1 | 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
|  | *Examples:* | | | |
| Org value 2 | 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
|  | *Examples:* | | | |
| Org value 3 | 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
|  | *Examples:* | | | |
| Org value 4 | 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
| 1. Insert behavioural indicator |  |  |  |
|  | *Examples:* | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Reflections and comments** Count the ratings in each of the above columns. The column with the most ticks should be used for your overall rating. If your reviewer has a different score explore why. | |  |  |  |
|  |  |  |  |  |
|  | **Your overall rating:** |  |  |  |
|  |  |  |  |  |
|  | **Reviewers overall rating:** |  |  |  |
|  |  |  |  |  |

1. **Reviewing my career**

This section will help you to reflect and discuss where you are at a given point within your career. Take some time to consider which of the two columns are most relevant to where you are today and then use that column as the basis for your discussion. If you change your mind half way through the discussion you are free to complete and discuss both columns. Remember, for those considering a change of role, this could include a range of options including a sideways move, stepping down into to a less senior role or moving up into a more senior position.

What I would like to achieve within my role?

**OR**

**At this point in my life or career I am content to stay in my current role and do not feel the need to explore other options**

What are my intentions? / What roles am I considering?

**I am considering moving to another role now or at some point in the future and would like to explore this in greater depth**

What is my primary motivation?

What support I need to achieve this?

What support or development will I need to make the transition? Or what might I need to do differently?

If at this point you are still considering moving to another role the please go to section 4.1 to review your current appetite and potential for a transition.

What other considerations in my life do I need to balance with this?

If at this point you are content to stay where you are and to maximise your potential within your current role then please go to section 5. If not you may find it helpful to complete the right-hand column.

* 1. **Reviewing my current motivation and potential to move to another role**

Whilst everyone is free to complete this section, it is primarily for those considering a transition. Use the simple self-reflection tool below to evaluate where you are today and ask your reviewer to evaluate you against the same criteria. Your motivation and potential is impacted upon by events in and out of work and also by your current state of mind so feel free to complete this as often as you need.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Reflecting upon my potential**  Use the 3 point rating scale to indicate how consistently you display each of the statements and record examples for each of the four areas. Focus on the here and now rather than how you have been in the past or might be in the future. Include ratings from you (with a ✓) and your reviewer (with a 🗶). | | **Rarely** | **Sometimes** | **Consistently** |
|  |  |  |  |  |
| **Motivational agility** | 1. Actively takes opportunities to stretch and challenge themselves |  |  |  |
| 1. Expresses an ambition to progress their career |  |  |  |
| 1. Demonstrates a genuine appetite to develop their effectiveness and capability beyond their current role |  |  |  |
| 1. Has a clear sense of how they would like their career to develop over the next few years |  |  |  |
|  | *Examples:* |  |  |  |
| **Learning agility** | 1. Keeps abreast with the latest developments, learning and acquiring the latest skills and knowledge |  |  |  |
| 1. Aware of their own development priorities and proactive in reviewing their personal growth |  |  |  |
| 1. Keen to try new things, keep an open mind and take some personal risks |  |  |  |
| 1. Seeks, values and responds to feedback from people at all levels |  |  |  |
|  | *Examples:* |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Emotional agility** | 1. Aware of how their behaviour, attitude and actions impact upon those around them |  |  |  |
| 1. Remains calm and focused despite distractions and maintains focus on what is important |  |  |  |
| 1. Able to bounce back from disappointments, choosing not to dwell on negative experiences |  |  |  |
| 1. Quick to pick up on the emotions of those around them and adjust their behaviour accordingly |  |  |  |
|  | *Examples:* |  |  |  |
| **Thinking agility** | 1. Effective at understanding, tackling and resolving complex problems |  |  |  |
| 1. Displays sound judgement and makes clear decisions, even in the absence of complete information |  |  |  |
| 1. Able and prepared to make a decision when faced with conflicting viewpoints |  |  |  |
| 1. Able to see the links and relationships between different factors, takes these into account before reaching a decision |  |  |  |
|  | *Examples:* |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Reflections and comments** Count the ratings in each of the above columns to establish how consistently your motivation and potential is displayed currently. The column with the most ticks is the one that you should use for your overall rating. | |  |  |  |  | |
|  |  |  |  |  | |  |
|  | **Your overall rating:** |  |  |  | |  |
|  |  |  |  |  | |  |
|  | **Reviewers overall rating:** |  |  |  | |  |
|  |  |  |  |  | |  |

* 1. **Summarising my current career aspirations** (to be completed by those considering moving to another role)

Use the quadrants below to summarise the information from your review. Reflect upon what this means for you and the actions you will need to take over the next few months / the year ahead, ensuring these are recorded within your development goals in the next section. The information on this page is subject to continuous change so will need to be reviewed / refreshed at least every 6 months.

**Current performance**

**Overall ratings from the review of your objectives and behaviours**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | partially | meets | exceeds |
| Objectives |  |  |  |  |
|  |  |  |  |  |
|  |  | rarely | sometimes | consistently |
| Behaviours |  |  |  |  |

Include ratings from you (indicate with a **✓**) and your

reviewer (indicate with a 🗶)

**Current motivation and potential to move to another role**

**Overall rating for your current appetite and potential**

*This summarises how consistently you are displaying motivation and potential to move to another role at this point in time*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | rarely | sometimes | consistently |
| Current potential |  |  |  |  |

Include ratings from you (indicate with a **✓**) and your

reviewer (indicate with a 🗶)

**Current readiness**

**Readiness to fulfil short term career aspirations**

|  |  |  |  |
| --- | --- | --- | --- |
|  | * Ready now |  |  |
|  | * Ready 6 – 12 months |  |  |
|  | * Ready 1 – 2 years |  |  |
|  | * Ready 2+ years |  |  |
|  | * Not ready (the time isn’t right for me) |  |  |

Include ratings from you (indicate with a **✓**) and your reviewer (indicate with a 🗶)

*Summarise in the next section the specific actions and support you will need to be ready to make the transition to another role*

**Current aspirations**

**Short term career goal**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Type of role |  |  | | |
|  |  |  |  |  |
| Type of organisation |  |  | | |

**Implications of short-term career goal**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | | |  |  |
| - a step up or career progression |  |
| - a lateral move within the organisation |  |
| - a lateral move outside the organisation |  |
| - a step back from my current position |  |
| - a career shift to another profession or industry |  |

**Long term career goal**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Type of role |  |  | | |
|  |  |  |  |  |
| Type of organisation |  |  | | |

1. **Agreeing my development goals and work objectives**

Your reviewer / manager should share their goals and those of the wider team at this point to ensure that your objectives are linked to the wider organisational objectives and that people are working together in a supportive and joined up manner. You may choose to vary the ratio of short versus longer term objectives depending upon the nature of your role, although try to ensure that you end up with no more than 6 overall.

|  |  |
| --- | --- |
| **Goal and objective setting for the next 2 – 3 months**  Summarise the key goals, priorities or objectives for you over the next 2 – 3 months. This includes goals that relating to your career, personal development and wellbeing. | **Target date** |
| 1. |  |
| 2. |  |
| 3. |  |
| **Goals and objectives over the next 6 – 12 months**  Summarise longer term goals and objectives that you will be working on over the next 6 – 12+ months. This includes goals relating to your career, personal development and wellbeing. | **Target date** |
| 1. |  |
| 2. |  |
| 3. |  |

Reviewer signature:

Your signature:

Agreed date for next conversation: