

Review of Achievements Guidelines

The final step in our annual cycle is the Review of Achievements. This is an important way to “close the loop”, reflect on progress against your individual ADEP Plan, and recognise your achievements. Much like the ADEP process, the Review of Achievements occurs through a Review Conversation with your manager. It’s a good idea to start preparing at least a few weeks in advance of your Review Conversation, so that you have enough time to gather any supporting information such as feedback or data and to reflect on it before your conversation. The more prepared you both are, the more you will both get out of the conversation.

All resources mentioned below can be found on the [Performance Partnering](#) page on Te Aka.

Here’s what you will need for your Review of Achievements:

- Your ADEP Plan for the year you are reviewing along with any notes/amendments you have made as part of your check-in conversations throughout the year.
- The **Review of Achievements template** for the year you are reviewing.
- Any feedback you have received from individuals or groups you partnered with throughout the year
- Any supporting information (feedback, evaluative material or data) that may provide evidence to support your achievements.

Here’s what you need to do:

1. Before your Review Conversation

- a) **Seek feedback** from the key individuals or groups you have partnered with throughout the year
 - Think about approaching people who can provide useful feedback for you – it’s good to have a mix of individuals or groups that you partner with in different contexts. About 6-8 is ideal to get a good range of feedback. They can be either internal or external to Unitec.
 - Talk to your manager about who you are approaching and invite their thoughts
 - Keep it simple and make it easy for people to provide feedback – by email is usually easiest. **There is an example form at the end of this document that you can use as a guide.**
 - Collate the feedback into one document as it comes in, ready to share with your manager at the Review conversation.

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- b) **Gather any supporting information** – feedback, evaluative material or data – that may provide evidence to support your comments about what you’ve achieved. This will depend on the goals you’ve set, but could include things like:

- Feedback received throughout the year
- Values recognition cards
- Nominations for awards
- Post project reviews
- External recognition
- Publications
- Student success or retention data
- Course or workshop evaluation data
- Course or programme development
- Process improvement information
- Conference attendance
- Badges awarded / badge feedback

2. Drafting your Review of Achievements Form

- a) **Draft your Review of Achievements form** based on your own self-assessment of your performance – the form has been designed to be as simple and easy to complete as possible. It follows the same format and layout as your ADEP Plan, and steps you through a review of how you’ve done against each of the four parts of ADEP. Consider the prompts on the form when completing each section.

- The easiest way to do this is to cut and paste your key goals (at high level) from your ADEP Plan into each quadrant of your Review of Achievements form and simply work through the form and comment against them. Then you can add any additional comments or explanatory notes as required.
- It is recommended that you send your draft form through to your manager prior to the review conversation – this gives them the opportunity to have a look at your comments and think about any questions they might have or points they might want to add. Again – the more prepared you both are, the more you will get out of the conversation!

- b) **Complete the ACHIEVE section** – consider the following as you go:

- Firstly, think about your day-to-day work – the **key accountabilities** or responsibilities of your position (if you’re not sure what these are, check your position description). Comment on the extent to which you feel you’ve been able to meet these accountabilities. You don’t need to provide detailed information here – just a statement as to the extent to which accountabilities have been met or not (and if not, in which areas were they not met, and any reasons as to why).
- Then think about the **individual goals** that you set in your ADEP Plan. To what extent were each of the goals achieved? Think about both quality and timeliness. Was there anything that got in the way of achieving your goals? How did you deal with these obstacles? What impact did this have? Make sure you note down any reasons for goals that weren’t achieved.
- What could you have done differently that might have resulted in a greater level of achievement – either in terms of quality or timeliness?
- Where have you exceeded expectations – either your own or others?

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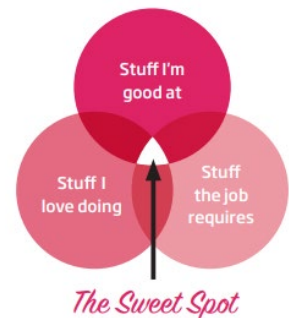
- Consider any achievements that were not part of your plan – how did you add value above and beyond your individual goals? Make sure you note these down.
- Are there any goals that need to be carried over to next year's ADEP Plan? Make a note of these and make sure they get transferred across.

c) **Complete the DEVELOP section** – consider the following as you go:

- First, consider your **professional development badge requirements** and comment on the extent to which you've been able to meet these requirements. Document the badge/s you have completed and when. If requirements have not been met, note down any reasons for this and your plan (including timelines) for completion.
- What **other professional development** have you undertaken? Were you able to achieve what you set out to in terms of development activities? Comment on the extent to which your development plan was achieved.
- If there are development goals or requirements that weren't achieved, what was the reason for this? Make sure you note down any explanation.
- Did you use your professional development (PD) leave as planned? Was it logged and captured in the system?
- Are there any development goals that need to be carried over to next year's ADEP Plan? Make a note of these and make sure they get transferred across.

d) **Complete the ENJOY section** – consider the following as you go:

- How successful were you at doing the things you listed in the ENJOY section of your ADEP? Did you manage to incorporate these things into your day-to-day work?
- What other aspects of your work or environment have helped you sustain your performance and enjoy your work? What excited and energized you? How could you build these into your working practice going forward?
- How often do you think you managed to work in your "sweet spot"? What impact did this have?
- What got in the way of enjoyment? How did you deal with these obstacles?
- How could you have organised your work to build more of what you enjoy into your day-to-day?



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e) **Complete the PARTNER section** – consider the following as you go:

- If you gathered feedback from those you have partnered with – what is this feedback telling you about your strengths and potential areas for development?
- How successful were you in building and maintaining relationships with key partners?
- What did you think you did particularly well in partnering with others? What didn't go so well?
- How well do you think you've demonstrated Living Te Noho Kotahitanga?
- Are there any particular challenges or friction points that are getting in the way of successfully partnering? What impact are these having? How could you resolve them?
- How well do you think you and your manager are partnering? Is there anything either or both of you could do differently to partner more successfully together?

3. The Review Conversation

- a) **You and your manager should use the Review of Achievements form to guide the Review conversation**, talking through each of the four parts of ADEP, using the prompts on the form, discussing the points you have drafted and amending or capturing any additional points arising from your discussion as you go. You can either use your draft as a starting point and add to this as you go, or you can start afresh with a new template – whatever works for you both.
- b) Then consider the **ACHIEVE** section and use the **Guide to Levels of Achievement** on Page 4 of the form to discuss and agree a level of achievement in relation to your accountabilities and goals. Indicate this by marking the appropriate box on the form:

Agreed Level for Achievement of Key Accountabilities and Goals:

(Refer to the Guide to Levels of Achievement on Page 4)

☐	Partially Achieved	☐	Mostly Achieved	☐	Achieved	☐	Highly Achieved	☐	Exceeded
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- c) Then consider the **PARTNER** section – based on your conversation, feedback received and any other evidence, discuss and agree the extent to which you have effectively demonstrated the Unitec values (Te Noho Kotahitanga) through your work, and indicate this by marking the form as appropriate:

Overall to what extent have Values been effectively demonstrated?

☐	Effective Generally aligned; demonstrates the behaviours inherent in our Values	☐	Further improvement needed Generally disregards; with behaviour contrary to that inherent in our Values
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Note that the vast majority of Review conversations are expected to result in an agreed evaluation of “Effective”. There will, however, be a very small number who are not currently aligned to our values – and in this case, we would expect that they would already be engaged in separate conversations with managers or HR Business Partners (as appropriate) regarding this.

- d) Finally, discuss and agree an **Overall Level of Achievement** – taking account of your performance across all areas - and indicate this by marking the relevant section on the Review of Achievements form:

Overall Level of Achievement
(Refer to the Guide to Levels of Achievement on Page 4)

☐ Partially Achieved	☐ Mostly Achieved	☐ Achieved	☐ Highly Achieved	☐ Exceeded
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- This is the Level of Achievement that will be put forward for endorsement by your leadership team.
- In most cases, this will be the same as the level you agreed for the **ACHIEVE** section of the form – although if you received an evaluation of “Further Improvement Needed” for the **PARTNER** section, this will impact your overall level of achievement.

4. Following the Review Conversation

- a) Make any further amendments that may be required as a result of your Review conversation and send the completed form to your manager. Make sure you have indicated agreed levels of achievement on the form. Note that if you’re unable to agree on a level of achievement, this should be documented on the form - you should indicate the level of achievement you feel is appropriate with comments to support your evaluation, and your manager should do the same.
- b) Your manager will add any further comment they feel may be appropriate to support the level of achievement – you are welcome to also add your comment.
- c) Your Review of Achievements will be **endorsed** by the leadership team – in most cases this will not result in any change to levels of achievement. In a very few cases, the endorsement process could mean that individual levels of achievement may need to be amended slightly for the purpose of consistency. If this is the case, your manager will advise you of any change.
- d) Once your Review form is finalised you will need to ensure both you and your manager have signed it and then you will need to **submit it** by uploading the form to PeopleSoft through Staff Self Service – click [here](#) for instructions on how to do this.

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Review of Achievements Example Feedback Form

Kia ora [name]

As part of our annual Performance Partnering cycle, I will shortly be reviewing my performance for [year] and I would be really grateful for any feedback you can provide on how well I've partnered with you [and your team] and how well I've demonstrated the Unitec values – Te Noho Kotahitanga - through my partnering.

I've provided some key questions below as a guide. I would be particularly keen on any thoughts you might have on where you think I could focus my development efforts. A brief, bullet point response is absolutely fine.

As per the Review of Achievements process, my manager will also see the feedback you've provided as part of our Review conversation.

Many thanks,
[your name]

1. In what ways did I demonstrate living Te Noho Kotahitanga in working with you?
2. What were my strengths?
3. What should I focus on for my development?
4. Any other comments?