Line Manager’s checklist

This checklist outlines a manager’s responsibility in relation to the Annual Review Conversation (ARC) process. The process has been broken down into stages (before, during, and after).

The steps in grey rows are optional and have been suggested to support you in managing this process effectively.

Before

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| --- | --- |
| **Steps** | **Completed** |
| Receive and review the responses to your team member’s ‘ARC Preparation Form’ via email. |  |
| Inform your team member of any additional topics you would like to discuss 1-2 weeks before the ARC meeting. |  |
| Schedule the ARC meeting/s based on a staff member’s preferences  *If the individual has requested two meetings, clarify what will be covered in each in the meeting invitation* |  |
| Prepare for the meeting.  Set some preparation time aside to consider the topics your team member has selected.  You may want to review guidance relevant to what they have selected. |  |
| Book a [micro-development session](https://www.imperial.ac.uk/staff-development/coaching-and-mentoring/micro-development-for-staff-and-managers/).  Go to the POD website to book a session. |  |
| Gather feedback – if your staff member has opted to receive feedback from stakeholders, use the ARC ‘Feedback tool’ to support this process. |  |
| Visit the [ARC web pages](https://www.imperial.ac.uk/staff/arc/) to access the ‘[ARC Toolkit’](https://www.imperial.ac.uk/staff/arc/arc-toolkit/) |  |
| Visit our [Management Development web pages](https://www.imperial.ac.uk/staff-development/courses-and-programmes/leadership/) for skill development to support this conversation and ongoing one-to-ones. |  |
| Sign up for our ‘[Effective Communication Skills’](https://www.imperial.ac.uk/staff-development/courses-and-programmes/professional-effectiveness/courses/effective-communication/) session. |  |

During

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| --- | --- |
| **Steps** | **Completed** |
| Carry out the Annual Review Conversation  *Following the structure set out in the ‘ARC Preparation Form’ email response, have a conversation with your team member.*  *You should cover all five topics and be guided by the ARC Question Bank for Managers*  *using the ARC Outcomes Form document as a prompt to guide the conversation if that is useful.* |  |
| Identify actions and take notes if it is useful to you. |  |

After

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| --- | --- |
| **Steps** | **Completed** |
| Receive the ARC Outcome Form from your team member. |  |
| Make any additional notes and sign the document once you are both happy with it.  *The content of the ARC and any notes should remain confidential, but there may be elements of the discussion that could support themes that you identify from feedback from line report/s. You should consider how you might respond to such themes.* |  |
| Ensure that the ‘Plan’ section of your member of staff’s ‘ARC Outcome Form’ document is sent to your manager.  *This is primarily the responsibility of your member of staff. More information on this can be found in the guidance on the ARC Form document.* |  |
| Record the completion of the ARC meeting using the ARC Completion Form <https://www.imperial.ac.uk/staff/arc/> |  |
| Continue the conversation and communication throughout the year as part of one-to-ones  *You should have regular one-to-one conversations with your manager, as appropriate for you and your role.* |  |
| Review documentation as agreed throughout the year  *As a minimum, you should have a review of your staff’s ARC key points and actions in six months.* |  |