

## People management self-assessment tool (SAT) Summary of HEFCE requirements

The reporting requirements to HEFCE following the self-assessment process (whether using the SAT, some other method, or a combination of approaches) are outlined below.

### 1. Short description of the self-assessment process used

This could be a copy of a Board or Committee paper, if this is sufficient. It must:

- show how the principles of self-assessment (objectivity, transparency, institutional involvement, and a degree of independent validation\*) have been met
- identify the core areas of people management you have assessed yourself against.

\* Independent validation can be achieved through the inclusion of external consultants, governor(s) and/or peers in other HEIs, for example.

### 2. Description of key issues arising

This might already be described in an existing paper.

### 3. Action plan/improvement plan to address these issues

This could be a revised HR strategy and its delivery plan, or an SAT implementation plan, describing the actions planned to deal with key issues arising, including evidence that:

- the action plan has been approved at a senior level
- the action plan can be resourced.

### 4. A commitment to continuous improvement

What plans are there for conducting the next strategic review of people management?

- Please send the information to Amy Norton [a.norton@hefce.ac.uk](mailto:a.norton@hefce.ac.uk) and Gemma Helbert [g.helbert@hefce.ac.uk](mailto:g.helbert@hefce.ac.uk) by 30 May 2008 to remove conditions on R&DS grant from Aug 2008.

Our key requirement is to understand the process and outcomes identified by the institution as a result of self-assessment. It is at the institution's discretion how this is reported. It may be that one existing document would address all three reporting requirements, for example a committee report to the board of governors on the process undertaken, recommendations and action plan. Similarly, if the SAT has been used to inform the development of a revised HR strategy, the institution could choose to send a copy of the revised HR strategy to HEFCE (with an action plan, or a short summary of the issues changed) with a brief description of the SAT process undertaken. If any institution is unclear about the reporting requirements, contact Amy Norton at HEFCE 0117 931 7025 [a.norton@hefce.ac.uk](mailto:a.norton@hefce.ac.uk) or Gemma Helbert 0117 931 7103 [g.helbert@hefce.ac.uk](mailto:g.helbert@hefce.ac.uk)