

Performance and development review form

Academic, research, teaching and scholarship staff

In preparation for the review meeting, reviewees should consider all sections of the form, make notes in the shaded areas and send this to the reviewer before the scheduled PDR meeting.

Reviewee		Job title	
Reviewer		Department	
Period covered by review	From : To:	Review date	

Your review of last 12 months

Opportunity for you to explore the overall context, giving specific and constructive feedback – this should include feedback from others where relevant

What has gone well?

Consider possible different elements of your performance, possible areas to think about include:

- How you have worked (e.g. values, collegiality), not just what you have achieved;
- What has given you greatest satisfaction in your work;
- What progress do you feel you have made;
- What contribution do you feel you have made to the wider department/university;
- Your contribution to administrative activities;
- How you feel you have performed against the requirements of your role (it may be helpful to reference the information available through the University's Teaching and Research Expectations; Leadership Principles etc.);
- How are you progressing against academic promotion criteria;
- Your publications;
- Your teaching or other student feedback;
- Grant submissions;
- Research income;
- Knowledge exchange;
- Equality, diversity and inclusion, Athena Swan work etc.

...

What could have gone better?

eg. barriers, mitigating circumstances, ideas for improvement for the next 12 months

...

Your progress against objectives

You may wish to attach last year’s objectives. Comment on what you have achieved and how. Where appropriate, review progress against longer-term plans. **(If copy and pasting a table from a previous year’s form, delete the table below first to avoid formatting problems)**

Research - Objectives & success measures:	Progress:
Teaching, scholarship & professional practice - Objectives & success measures:	Progress:
Academic citizenship for the department and university - Objectives & success measures:	Progress:

Other achievements and/or any progress against additional objectives agreed since your last performance review meeting

...

Summary of overall performance

For example, overall, were the expectations of the role met in this review period?

Reviewee’s commentary

...

Reviewee’s self-assessment

Taking all of the above into account, which of the following best describes your performance over the last 12 months?
(Please check a box)

Excellent	Good	Satisfactory	Needs some improvement	Needs significant improvement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reviewer’s commentary

...

Reviewer’s assessment

Taking all of the above into account, which of the following best describes the reviewee’s performance over the last 12 months? (Please check a box)

Excellent	Good	Satisfactory	Needs some improvement	Needs significant improvement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other considerations and ideas for improvement

Any other areas for discussion not covered elsewhere; For example, a discussion about health and safety, wellbeing, work life balance, support available, collegiality within the department, communication, suggestions for improvement

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Career development aspirations / future plans

It may be helpful to discuss longer-term career plans, performance against promotion criteria etc.

...

Objectives and success measures for the next 12 months

Research

Updated longer-term plan:	Success measures:
Objectives for the next 12 months:	Success measures:

Teaching, scholarship and professional practice

Updated longer-term plan:	Success measures:
Objectives for the next 12 months:	Success measures:

Academic citizenship for the Department and University

Updated longer-term plan:	Success measures:
Objectives for the next 12 months:	Success measures:

Personal development

Review of development areas identified at the last review

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Areas for development for the next 12 months

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Development area	Action to achieve	What support do I need?	When do I expect to have completed this?

Final comments

Opportunity to make any final comments in relation to the PDR meeting, the review period etc.

Reviewee's comments

...

Signature / date

Reviewer's comments

...

Signature / date

Reviewer's Line Manager's comments / Head of Department's comments (if not the reviewer)

It is not always necessary to record comments but the HoD should always comment where there are differences in assessment between the Reviewer and Reviewee

...

Signature / date

What happens to the information in this form?

- The reviewer's line manager may review this summary, to ensure consistency across the team/department.
- A copy of the completed form, including the reviewer's line manager / head of department comments, should be given to the reviewee at the completion of the PDR process.
- Nominated individuals within the HR team will have access to information about performance ratings in order to undertake equality monitoring and to collate a broader picture of performance across the institution. This information will be made available to the university's senior managers as aggregated anonymised high-level data only.
- Information about learning and development needs may be made available to nominated departmental and HR staff in order to coordinate learning and development programmes.
- In order to do fulfil the above, the Head of Department may be supported by nominated administrative support, e.g. to provide the required information to the HR team.
- PDR forms should only be retained by the reviewer/department for an appropriate period of time, i.e. up to 3 years.