

Performance and development review form

Professional and support staff working to objectives of 3 months plus

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	

Review of last 12 months

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

What has gone well?

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

- How you have worked (eg. values and behaviours, collegiality, team-working, cross-departmental working), 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;
- How have you performed against the requirements of your role etc.;
- Student / staff feedback;
- Contribution to 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. Review progress against any longer-term career aspirations/plans. **(If copy and pasting a table from a previous year’s form, delete the table below first to avoid formatting problems)**

Objectives and success measures:	Progress:

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

eg. ‘Making the difference’ awards etc.

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**

☐

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**

☐

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

...

Career development aspirations / future plans

It may be helpful to discuss performance against the requirements of the current and higher graded roles in which you may be interested for future development.

...

Objectives and success measures for the next 12 months

Objectives:	Success measures:

Personal development

Review of development areas identified at the last review

...

Areas for development for the next 12 months

...

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

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 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.