**Confidential**

**Annual Performance & Development Review**

**Review Form (Academic Staff)**

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| 1. **Name:**
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| 1. **Job Title/Position:**
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| 1. **School/Office:**
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| 1. **Date Started Post:**
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| 1. **Name of Reviewer:**
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| 1. **Reviewer’s Job Title:**
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| 1. **Date of Review:**
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**Guidance Notes:**

**Before the Review:**

**For the Reviewee:**

* The PA to the Head of School will contact you to set the date for the annual review.
* Please check [Research Explorer](http://www.research.ed.ac.uk/portal/)/[Pure](http://www.ed.ac.uk/schools-departments/governance-strategic-planning/research/pure/home) to ensure all your information is correct and up to date.
* Please check the WLM (both the [Front Page](https://www.geos.ed.ac.uk/internal/twlm/) and the [Database View](https://www.geos.ed.ac.uk/internal/twlm/my_workload/)) to ensure all your information is correct for both the current and forthcoming years.
* If you have been on sabbatical/study leave since your last performance and development review, please ensure you have submitted your final short report (<3pp of A4) on activities and outcomes to your Head of Research Institute within 3 months of return from study leave.
* Please complete sections A-F of the Annual Review form at least 10 days in advance of the agreed date of your annual review and send to Connie Fox who will ensure that the reviewer has it at least 7 days in advance of the meeting.
* Please note that in addition to the review form, the reviewer will have access to supplementary information from the TO (Evasys student survey information) and RTD and, if appropriate, the Facility Annual Report.

**For the Reviewer:**

* The PA of the Head of School will schedule the date of the annual review in your diary.
* You should receive a completed Annual Review Form at least 7 days in advance of the agreed date of the annual review.
* You should also receive the following supplementary information: the Evasys student feedback information from the TO, an e-mail from RTD outlining any PhD supervision issues (if any exist), and Facility annual report (if appropriate).
* Please check the reviewee’s [Research Explorer](http://www.research.ed.ac.uk/portal/) profile.
* Please check the reviewee’s [WLM](https://www.geos.ed.ac.uk/databases/workload/) information.

**After the Review:**

After the review, you, the reviewee, will have an opportunity, should you wish, to update sections A-F in light of the discussions and agreed actions. The form should then be passed back to the reviewer to complete Section G.

You will then be asked to comment on the summary and action points before signing off the form and returning it to your reviewer. Please keep a copy of your review document.

This document is confidential to the reviewee, reviewer and to the Head of School (or equivalent), unless agreed otherwise with the appraisee.

**Section A: Teaching and Student Support**

**Taking Stock.** Before completing this section, please review your WLM teaching-related activity and associated tariffs (see guidance notes on page 2). Please note that your reviewer will have access to Evasys student feedback information.

With this in mind, please reflect on your achievements in teaching and student support of the past year, including: teaching commitments, developing and improving teaching materials (including use of online and blended teaching approaches), School or University teaching roles, the personal tutor role and system, and external esteem indicators including External Examiner roles, HEA Fellowships, participation in external TPRs etc.

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**Planning Ahead.** Looking ahead at the coming year as well as your longer-term career development goals, please discuss your future teaching aspirations; e.g. future teaching commitments, innovation and curriculum development, School or University teaching management roles etc.

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**Section B: Research Activities**

**Taking Stock.** Before completing this section, please ensure that your Research Explorer page is up to date with your publications and grants (see guidance notes on page 2). Please note that your reviewer will have access to your Research Explorer profile page.

If you have been on sabbatical/study leave since your last performance and development review please ensure you have submitted your final short report (<3pp of A4) on activities and outcomes to your head of Research Institute within 3 months of return from study leave.

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| Reflect on your research activity in the past year. |

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| 1. Identify your top publications (from 2014 onwards) and how you believe they would score in REF (4\*, 3\*, 2\* etc.) on the basis of ‘originality’, ‘significance’ and ‘rigour’.
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| 1. Reflect on your grant application activity in the past year (successful or otherwise).
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| 1. Identify measures of external esteem (invited keynote talks, invited membership of national or international committees, prizes, medals etc.)
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| 1. Have you completed annual reviews for all your research staff? Identify any current issues.
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| 1. How have you supported your postgraduate students? Identify any current issues.
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**Planning Ahead.** Looking ahead at the coming year as well as your longer-term career development goals, please discuss your future research aspirations; e.g. future REF publications and choice of outlet (journal, book publisher), funding strategy, opportunities to enhance external esteem indicators, and new research students.

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**Section C: Pathways to Impact and Public Engagement**

**Taking Stock.** Before completing this section, please ensure that your Research Explorer page is up to date with your Knowledge Exchange (KE) and Public Engagement (PE) activities.

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| Discuss your KE and PE activities in the past year. |

**Planning Ahead.** Looking ahead at the coming year as well as your longer-term career development goals, please discuss your future KE and PE aspirations in terms of opportunities and development plans.

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**Section D: Leadership and Good Citizenship**

**Taking Stock.** Please list your leadership roles within the School and the University and beyond, which may include Facility Management, and discuss your progress within those roles.

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**Planning Ahead.** Looking ahead at the coming year as well as your longer-term career development goals, please discuss plans and aspirations for further development within your current roles and/or for new ones.

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**Section E: Professional Development**
**Taking Stock.**

It is a requirement for all staff within the school involved in recruitment activities to have completed the University’s Equality and Diversity and Unconscious Bias training. Please tick the box to confirm you have undertaken the training within the last 2 years [ ]

Please describe any professional development over the past year in teaching, research, leadership and KE (e.g. Training Courses, Conferences attended).

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**Planning Ahead.** Looking ahead at the coming year as well as your longer-term career development goals, please discuss professional development opportunities in the short and medium-term future.

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**Section F: Additional Information**
**Any other matters you wish to discuss.** Please use thespace below

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**Section G: Summary and Action Plan**

This section includes a summary of the review meeting, assessing achievements against objectives as well as a summary of the agreed activities, goals, aims and targets for the next year. The summary of action points should include: clear identification of practical changes that have been agreed, and recommendations for further training, support or other resources.

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| 1. Summary of review meeting as well as overall assessment of achievements.
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| 1. Agreed activities, goals, aims and targets for the next year.
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| **Signed:****(Staff Member: Appraisee)** |  | **Date:** |
| **Signed:****(Reviewer)** |  | **Date:** |
| **Signed:****(Head of School)** |  | **Date:** |