**Confidential**

**Annual Performance & Development Review**

**Review Form (Research Staff)**

Please complete sections A and B of the form, taking into account the School’s Guidance on Annual Performance and Development Reviews, and return to your reviewer no later than 7 days in advance of the agreed date of your review meeting. You may wish to make a copy for your own use.

After the review, Section C (which includes the Action Plan) should be agreed and signed by both parties (reviewee and reviewer) and then approved and signed by the RO Manager. A copy of the action plan will then be returned to you to use as a reference at your next Annual Review.

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

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| 1. **Name:** |  |
| 1. **Job Title/Position:** |  |
| 1. **School/Office:** |  |
| 1. **Name of Reviewer:** |  |
| 1. **Name of Principal Investigator:** |  |
| 1. **Contract of Employment Start Date:** |  |
| 1. **Contract of Employment End Date:** |  |
| 1. **Date of Review:** |  |

**Section A: Review of Project Progress**

This section allows the reviewee to evaluate their progress towards the goals of their specific research project (or Facility Management role) in the past year: by comparing their main areas of activity to their job description, by assessing their key achievements and progress made against agreed milestones, and by considering any hindering factors as well as any future training needs.

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| 1. Please attach a copy of your job description (and Facility annual Report, if appropriate) and comment on the main areas of work/projects you have been involved in. Please comment on how accurately the job description describes your current role. |
| 1. Briefly list your key achievements in the past year. This should include progress made on objectives set in your last annual review (if applicable). List the most significant areas of your work first. |

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| 1. Briefly list any aspects of your work situation which have hindered progress. |
| 1. Looking ahead, briefly list your project goals for the next year. |
| 1. Briefly list any obstacles you foresee in meeting your project goals over the next year, and how these might be addressed. |
| 1. Looking ahead, briefly list any new areas or responsibilities relevant to the project, that you would like to start to develop or in which you would like to become involved. |
| 1. Taking account of your main work areas, and project plans for the year ahead, what are your training needs over the coming year? |
| 1. If you expect to be leaving this position in the next year, what plans do you have for project completion, and passing on key skills/data/reagents? |
| 1. Is there anything else that needs to be noted here, for discussion? |

**Section B: Development Review**

This section allows the reviewee to consider their career development by listing their short to long term career aspirations and reflecting on the requirements of achieving these goals (e.g training opportunities etc.)

It is a requirement for all staff within the school 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

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| 1. What development opportunities (e.g. training courses, workshops, seminars, work-based experiences such as supervision, teaching, knowledge exchange/transfer and public engagement, and conferences etc.) have you participated in since your last Annual Review, and have they been beneficial? |
| 1. Briefly list your career development goals for the next year, and how you intend to achieve these. |
| 1. Briefly list any obstacles you foresee in meeting your development goals over the next year, and how these could be addressed. |
| 1. What are your longer term career goals? What action are you currently taking towards achieving these? |
| 1. What do you perceive to be your strengths and weaknesses with respect to your current position and future goals? |
| 1. What training or other developmental opportunities might help to address your perceived weaknesses? |
| 1. If you will reach the end of your current project and/or expect to be leaving this position in the next year, what are your future plans and how might these be facilitated? |
| 1. Is there anything else that needs to be noted here, for discussion? |

**Section C: Summary and Action Plan:**

This section includes a general assessment of performance as well as two action plans for the coming year: one for the project and one for longer term development. This section is to be completed after the review and has to be agreed by both reviewer and reviewee.

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| 1. Summary: Overall assessment of performance |

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| 1. Summary of action points pertaining to research project, including any training needs, agreed between appraiser and appraisee. |
| 1. Summary of action points pertaining to longer term development plans, including any personal development opportunities and training activities, agreed between appraiser and appraise. |

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| **Signed:**  **(Staff Member: Appraisee)** |  | **Date:** |
| **Signed:**  **(Reviewer)** |  | **Date:** |
| **Signed:**  **(RO Manager)** |  | **Date:** |