**Confidential**

**Annual Performance & Development Review**

**Review Form (Support Staff)**

Please complete section A 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 and the completion of Section C of the form, the form should be signed by both parties (reviewee and reviewer) and then approved and signed by the School Administrator. A copy of this form (and action plan) will then be returned to you.

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. **Position of Reviewer** |  |
| 1. **Date of Review** |  |

**Section A: General Assessment of Past Year’s Performance**

This section allows the reviewee to evaluate their performance in the past year: by comparing their main areas of activity to their job description, by assessing their key achievements and progress made, 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 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, summarise your planned objectives for the coming year, and briefly list any areas of your work you would like to develop, or new areas, relevant to your work, in which you would like become involved. |
| 1. Taking account of your main work areas, and the year ahead, do you need any training or development to help you in the coming year? General headings are fine for this form. |
| 1. Is there anything else that needs to be noted here, for discussion, because it will have an impact on your work, career, or any future professional development/training? |

**Section B: Competencies: Performance and Development**

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

The table below describes attributes which contribute to the successful performance of any member of support staff.

For grades 6 and above, there is a formal competency framework set by the University: <http://www.ed.ac.uk/schools-departments/human-resources/learning-development/dev-opportunities/leadership-development/competency-framework/overview>

Based on the information in Section A (and the requirements of the post), reviewer and reviewee may complete this section together at the Annual Review meeting.

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| **Competencies** | **Evaluation & Comments** |
| **Communicating and Working with People** | |
| **Being customer focused**  Identifying, understanding and giving priority to meeting the need of internal and external customers |  |
| **Influencing others**  Developing and using a range of strategies to influence and/or persuade others, in order to gain acceptance and commitment. |  |
| **Leading, developing and managing people**  Providing excellent leadership to help people perform at their best, through motivating and developing them to achieve. |  |
| **Developing Business Success** | |
| **Managing finances and resources**  Ensuring value for money by managing and monitoring budgets and making the best use of resources, within the University. |  |
| **Planning and organising**  Planning, prioritising and organising effectively to provide excellent services. |  |
| **Problem-solving and decision making**  Identifying and solving problems using insight and creativity and making decisions which best fit University goals. |  |
| **Pursuing professional excellence**  Pursuing excellence in line with the delivery of the University’s core goals. |  |
| **Building for the Future** | |
| **Embracing the need for change**  Recognising and responding positively to the need for change and seeking out opportunities to fulfil the need for change |  |
| **Thinking and acting strategically**  Seeing the “big picture” and harnessing ideas and opportunities to achieve the University’s vision |  |

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

This section includes a general assessment of performance as well as an action plan for the coming year. 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, including personal development opportunities and training activities, agreed between appraiser and appraisee. |

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| **Signed:**  **(Staff Member: Appraisee)** |  | **Date:** |
| **Signed:**  **(Reviewer)** |  | **Date:** |
| **Signed:**  **(School Administrator)** |  | **Date:** |