# Performance and development review form

## Academic Head of Department

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:** |  |
| **HoD term of office dates:** |  | | |

## 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, collegiality etc.), 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 progress and achievements in the department/wider university;
* Your contribution to administrative activities;
* How you feel you have performed against the requirements of your role;
* How are you progressing against academic promotion criteria (with respect to your reference post);
* Consider your publications;
* Teaching feedback;
* NSS and other student feedback;
* Grant submissions;
* Research income;
* Equality, diversity and inclusion, Athena Swan work etc.
* Consider how you have performed against the Leadership Principles.

…

### 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 longer-term career plans and aspirations. **(If copy and pasting a table from a previous year’s form, delete the table below first to avoid formatting problems)**

|  |  |
| --- | --- |
| **Objectives:** | **Progress**: |

### Academic research and teaching achievements

Use this section to note progress / achievements in respect of your own personal research / teaching activities in this period.

…

### 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** | | |
|  |  | |  |  | |  |  | |  |  | |  |

### 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 promotion criteria for the reference post, requirements of other roles to which you may aspire etc.

…

## Objectives and success measures for the next 12 months

|  |  |
| --- | --- |
| **Objectives for the role of Head of Department** | **Success measures**: |
| **Broader objectives to prepare for the period after completion of the term of Head of Department** | **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

…

|  |  |
| --- | --- |
| 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, eg. 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, ie. up to 3 years.