

**Annual Review and Development Form**

**Professional and Technical Services**

**Purpose of the Scheme**

The aims of the Staff Review and Development scheme are to:

* provide an opportunity for positive and constructive two-way review of work progress;
* allow agreement of an action plan;
* provide an opportunity for discussion of training needs for the current role and for career development;
* allow for identification and discussion of difficulties or obstacles to effectiveness;
* provide a way of considering personal needs and ambitions with the University’s overall objectives.

**How the Scheme Works**

Preparation:

1. The reviewer should contact the reviewee to agree a date and time for the review meeting and provide a copy of this form for them to add their comments.
2. The reviewee should let the reviewer know of any agenda items they wish to add.
3. The reviewee should bring the responsibilities part of their role description to the meeting.

*A copy of the previous review and/or the role description can be requested from the HR Office (Academic and Support Staff) (*[*hr-office@eng.cam.ac.uk*](mailto:hr-office@eng.cam.ac.uk)*)*

The Review Meeting:

The review meeting should be scheduled to take between half-an-hour and one hour. During the meeting any actions should be agreed, to be recorded after the meeting. The discussion at the review meeting is confidential to the reviewer and reviewee.

Recording the Outcome:

The form should be completed by either the reviewer or reviewee and must be seen and signed by both. The completed form should be sent to the HR Office (Academic and Support Staff) and a delegated member of the team will sign the form and return copies to the reviewer and reviewee.

The contents of the Summary of Discussion and Comments sections are confidential.

The Individual Training Log and General Issues and Comments section is not confidential. This allows the Head of Department and other senior staff to identify future departmental training needs, to monitor effectiveness of training undertaken and to address other generic issues.

Completion of part 4 (Personal Development Plan) is optional.

Reviewee’s Name: Job Title:

Name of Reviewer: Date of Review Meeting:

Period Appraisal Covers:

**Part 1: Reviewee Self-reflection**

**This part should be completed and sent to your reviewer in advance of your meeting.**

Take time to reflect on the last 12 months and consider your overall progress. Think about what you have learnt and how you have developed both personally and professionally.

**Reflecting back**

* What objectives did you set at your last review and to what extent do you feel that you have met these?
* What do you consider your most significant achievements or contributions to the team and organisation, of the past year?
* What have you found most challenging this year? What have you learnt from this year and what would you do differently next time?
* Do you know what has been expected from you in the past year and have you achieved this?
* Describe any professional development activities that have been helpful during the last year and skills you have developed.
* Describe how you have embedded the values of the organisation in your daily work and interactions with others.

***Reflecting back***

**Looking forward**

* What are your long-term career aspirations? How can we support you in achieving your ambitions through your objectives or personal development plan?
* Considering the organisational and team objectives, what personal objectives would you like to propose for the next year?
* What learning or development opportunities might help you to achieve your objectives? Consider training, mentoring, networks, as well as new projects or initiatives that you would like to be involved in, and people who you would like to meet.
* Is there one thing your manager could do differently to enable you to be more effective in your role? This is an opportunity to give feedback to your manager.
* What inspires you to do your best work and how can your manager support you in this?

***Looking forward***

**Part 2: Reviewer’s comments**

**The reviewer should complete this part in advance of the meeting so that it can be presented and discussed during the meeting.**

**Reflecting back**

This section allows feedback to the reviewee for the work and progress they have made over the last year. Please make your own comments on the questions below and respond to your reviewee’s reflections (see PART 1 above), in particular:

* The extent to which the objectives set for the year have been met
* How the reviewee has added value to the team/institution and met expectations
* Any particular challenges or obstacles faced and the extent to which they were overcome

***Reflecting back***

**Looking forward**

* The reviewee’s proposed objectives for the year ahead and the extent to which they align with those of the team and institutions? Would you suggest any amendments or additions?
* Ensure the reviewee is clear on the expectations for their role and objectives set
* The career aspirations and learning and development opportunities outlined by the reviewee. How can you support them? Are they realistic and achievable? Are their additional opportunities that could be offered, for example, training, mentoring, networks or initiatives or people that you could introduce them too?
* Think about the strengths of the reviewee and make sure that any objectives and projects help to ensure that they can showcase these skills and do their best work.

***Looking forward***

**Part 3: Objectives of the year ahead**

Discuss and agree specific objectives for the following year, taking into account goals, team objectives and individual aspirations.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Specific**  Work or development objective | **Measurable**  Indicators to measure success | **Achievable**  Further training or support required | **Relevant**  How it will support team or institutional objectives | **Timely**  Date by which you wish to achieve it by |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Part 4: Personal Development Plan**

Discuss and agree the training and development support to be given to help the employee meet the agreed objectives/metrics. Training and development isn’t restricted to training courses – it includes coaching, mentoring, work shadowing etc.

|  |  |  |  |
| --- | --- | --- | --- |
| **Development Objective/**  **Learning Need** | **Proposed Solution** | **Expected Benefit/Outcome** | **Target Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# **Part 5: Individual Training Log**

|  |  |  |
| --- | --- | --- |
| **Date** | **Duration** | **Training/Development undertaken** |
|  |  |  |

# **Part 6: Summary of Discussion and Comments (from the reviewer)**

# (to include review of progress, plans for the future and any action points agreed)

|  |
| --- |
|  |

**Part 7:** **General Issues and Comments (from either party)**

(to be addressed at a departmental level)

|  |
| --- |
|  |

I agree this is a true and accurate record of the meeting.

Signature of Reviewee: Date:

Signature of Reviewer: Date:

Signature of the HR Office (Academic and Support Staff) Staff Member: Date:

1. **Review of Key Performance Metrics**

**Continuing the conversation**

Once the form has been completed and signed off, the reviewer should send a copy to the HR Office (Academic and Support Staff) [hr-office@eng.cam.ac.uk](mailto:hr-office@eng.cam.ac.uk), so it can be recorded and signed off by the HR Office staff member. The reviewer should then schedule regular meetings for the year ahead (termly as a minimum) to review and revisit the status of the objectives set and progress made against these.