Guidance for Completing the Annual Review Form for Staff in Grades (1 – 4)

(AMENDED APRIL 21)

1 The Purpose of Annual Review

The purpose of Annual Review is to help you to ensure that your work contributes to the effective achievement of the University’s Strategic Objectives, whilst also supporting your own development. The review includes the opportunity for you to:

- Review and reflect on your performance over the last 12 months
- Agree objectives for the coming 12 months
- Consider your career development, with the option of submitting the form as part of the regrading process
- Identify training and development requirements needed to support you in your role

The quality of the discussion between the Reviewer and the Reviewee determines the effectiveness of the Annual Review process.

2 The Annual Review Timescale

The timescale for Annual Review will be determined by your School or Section. You will be assigned a reviewer (this will normally be your line manager) who will arrange the date of your meeting before asking you to complete an Annual Review Form. The form will be completed online, but paper forms will be available for those without access to a computer. Alternative methods of form completion will also be made available to staff members who require additional assistance.

The review form should be completed online at least 7 days before the date of the review meeting. Note that both the reviewer and the person being reviewed are equally responsible for ensuring that the timescales are met.

Following the meeting your reviewer will complete the “reviewer comments” section, which will be returned to you with any feedback, necessary additions or comments. Training and development recommendations will be considered by your School/Section and you will be informed of the outcome. It is your responsibility to ensure that your request for training is considered, particularly if it concerns health and safety or is necessary for your job role.

You should have a review annually, with a brief progress review after 6 months to modify objectives if necessary. If there are special circumstances and you wish to request a different reviewer, you should contact the individual who is responsible for co-ordinating the appraisal arrangements for your area. If you have scheduled leave of three months or more in the near future (including maternity leave) you may not be required to complete an Annual Review.

3 The Review Form

The form is divided into two sections: ‘Reflection’ and ‘Planning for Development’
3.1 Reflection

This section focuses on your work over the last 12 months with the University. You are given the opportunity to note your progress and achievements, as well as any difficulties you may have faced in your role. The ‘additional points’ question offers the chance to mention anything relevant from the last 12 months that you wish to discuss. This could be used to note whether or not you feel your role has changed in the past year.

3.2 Planning for Development

An individual’s appraisal objectives should be linked to team objectives and the University’s strategic objectives.

SMART objectives provide a clear indication of what an individual is required to do.

S specific, the objective provides a clear statement of what is expected.
M measurable, the individual will be able to measure and assess progress towards achieving the objective.
A achievable, objectives should enable individuals “to stretch” and to acquire skills, experience and knowledge; everything should be in place for the individual to deliver the objective. If training or other support is required, this should be identified and addressed.
R relevant, the objective adds value.
T timely, a timescale is given for the achievement of the objective so that the individual will be able to plan accordingly.

This section is focused on objective setting and development. Before your meeting you should draft objectives which you hope to achieve in the near future.

When setting an objective, it is worthwhile considering why it is relevant, how you will achieve it, how long it will take and any obstacles that may prevent you achieving it. It is good practice to have a brief review of progress towards achieving objectives after about six months. Objectives can then be modified at this stage if necessary.

Examples of Objectives

- Provide technical support in technique ……………. for the …………… research group.

- Provide all secretarial support to the Programme Coordinator for the ………… Programme during the period ………. to ….. while the curriculum is being revised.

- Prepare the Annual report for the Centre for ……. for communication to the School Executive by date ………

- Undertake training in …………………….. by December 2021.

- Provide development support to a trainee cleaner through mentoring for 6 months from ………

- Take action notes at Section/Group meetings from …………………
Skills Development

The Annual Review form provides an opportunity to identify any training and development requirements. The following are some ways in which knowledge, skills, training and learning can be acquired.

- Shadowing a more experienced colleague
- Job exchange
- Attending meetings
- Coaching
- Mentoring
- Participating in a learning set
- Further professional education

If you have identified a skill to be developed as part of your set objectives then you should outline how you would expect to achieve that skill, as well as the timescale and associated benefits.

Finally, there is the option to add any additional points relating to development. This includes specific career aspirations beyond your current grade which you would potentially like to discuss as part of your review.

3.3 Feedback

There is an opportunity in this section of the form to provide feedback on aspects of your work which you view positively together with details of any challenges or barriers which you have experienced. It is an opportunity to highlight any additional support that you might require from your line manager to achieve your objectives. Honest and constructive suggestions are encouraged.

There are some examples below:

- I feel I could benefit from more regular catch up meetings with my line manager to discuss my work
- I require access to a particular computer programme in order to perform to the best of my ability in my role
- I am pleased with the support I have received from my line manager
- I would appreciate receiving minutes from department meetings which I am unable to attend

3.5 Reviewer Comments

The Reviewer will complete this section after the meeting and return to the Reviewee for them to add their comments.

3.6 Reviewee Comments

This section is for the Reviewee to add any final comments.

Amended April 2021