Guidance for Completing the Annual Review Form for Staff in Grades (5 – 9)(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 promotion/regrading process
- Identify training and development requirements needed to support you in your role
- Identify agreed actions for additional support from your line manager to help you to achieve your objectives

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 or ALM) 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 regular access to a computer as part of their job. Alternative methods of form completion will also be made available to staff members who require additional assistance. Academic staff may refer to the Framework of Academic Expectations (FAE) when preparing for the review.

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. An Annual Review is not required if you plan to retire or leave the University with the next three months, or if you have scheduled maternity or other leave of at least three months duration which is due to commence in the near future.
3 The Review Form

3.1 Section One - Reflection

This section focuses on reflecting on the last 12 months with the University, or the period since you have been appointed, if you have taken up your post more recently. You are given the opportunity to note your progress and achievements, as well as any difficulties you may have faced in your role. You can also note whether or not you feel your role has changed in the past year and are encouraged to provide examples. Following this, you are required to outline the objectives that were set in your last review (if applicable) and to detail your progress towards achieving these. Finally, you are asked to demonstrate how your job has contributed towards enhancing the University, by thinking about your activities, the objectives of the area you work in and/or the University’s Strategic Plan (which is available at) https://www.abdn.ac.uk/2040

You are recommended to refer to your role profile and job description for clarity on your activities.

3.2 Section Two – Planning for Development

This section is designed to help with setting your objectives and planning your development. There is the option to add any specific career aspirations that you have which you would potentially like to discuss as part of your review.

Setting Objectives

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.

Before your meeting you should draft objectives which you would like to achieve in the near future. Some examples of objectives are provided below.

Job or Task Related Objectives

- Present a course synopsis at the next quarterly team meeting in ............... 2021.
- Supervise 6 or more undergraduate dissertations in the next academic year
- Review and amend the Health & Safety procedures by March 2022.
- Prepare the Annual Report for the Centre for ……..for communication to the School Executive by date …..
- Publish two quality (to be defined) papers in high impact journals by date ……..
- Organise and provide administrative support for the …… Committee for academic session …….., ensure that the Convener is briefed, all action points are communicated and any follow up action is taken.
- Work with Colleagues in the School/Section to arrange a conference on …….. to be held by …………. Develop a project plan for delivering the event by …………..
- Enhance your international profile by contributing as a keynote speaker at seminars/conferences during academic session…………

Management Objectives

Continue the establishment of your supervisory relationship with your team by establishing clear personal and team development plans for session ……..

Development Objectives

- Identify and cost an appropriate external course in ……………….by …………. for approval by the Head of School/Section.
- Arrange to shadow ………………. for on the job training in …………. by …………. 
- Register for the next intake of the University’s Postgraduate Certificate in Higher Education in Learning and Teaching.

When setting the objective, please consider why it is relevant, how you will achieve it, how you will measure progress towards achieving it and an estimated timescale. 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.

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
- Attending conferences and seminars
- Coaching
- Mentoring
- Participating in a learning set
- Further professional education (including postgraduate studies, degree courses etc)

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

3.4 Section Four – Additional Points

There is space to note any other relevant points which you would like to discuss with your reviewer.

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.

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