This form should be sent to the Reviewee in advance of the Annual Review meeting and used as a template for self-assessment and preparation. The Reviewee should send their partially-completed form back to the Reviewer prior to the meeting. The form should be completed by the Reviewer following the Annual Review meeting then signed by both parties (Reviewer and Reviewee) and then counter-signed by the next line manager. Completion of annual review should then be recorded by the reviewee (employee) in People and Money, following the guidance [here](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides). You no longer need to physically sign HR forms as long as you submit them via email from your University of Edinburgh email account.

**SECTION 1: REVIEW DETAILS**

To be completed by Reviewee in advance of the PandDR meeting.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | Name |  | | Position |  | | School/Deanery |  | | Division/Centre/Unit |  | | Name of Reviewer |  | | Position of Reviewer |  | | Date of Review Meeting |  | | Period covered by review |  | | I have completed the following mandatory online training:  (click in boxes to tick the appropriate ones) | [Equality and Diversity Essentials](https://elxw.fa.em3.oraclecloud.com:443/hcmUI/faces/deeplink?objType=WLF_LEARN_LEARNING_ITEM&action=NONE&objKey=learningItemId%3D300000342758445)  [Challenging Unconscious Bias](https://elxw.fa.em3.oraclecloud.com:443/hcmUI/faces/deeplink?objType=WLF_LEARN_LEARNING_ITEM&action=NONE&objKey=learningItemId%3D300000342758382)  [Information Security Essentials](https://infosec.ed.ac.uk/training)  [Data Protection Training](https://www.ed.ac.uk/records-management/training/data-protection)  [Managing Your Research Teams](https://www.ed.ac.uk/institute-academic-development/research-roles/research-managers/managing-research-teams)\*  \*aimed at PIs and all managers on grades UE08-10 and equivalent grades | |

**SECTION 2: SUPPORTING DOCUMENTATION**

To be completed by Reviewee to indicate supporting documentation being submitted to Reviewer in advance of the PandDR meeting. Tick as appropriate:

|  |  |
| --- | --- |
| Work Allocation Model information |  |
| Summary CV (Optional) |  |
| P Personal Development Plan (PDP) (Optional) |  |
| Other – please specify: …………………………………………………………………………… |  |

**FINAL SIGN OFF SECTION**

To be completed by Reviewee and Reviewer once the review meeting has taken place and the remainder of

the form has been completed. The Reviewer should then pass the form to the agreed line manager (normally

the Dean, Head of School, Head of Centre or Head of Division) for final sign-off.

Reviewees should record their annual review completion within People and Money or line managers may do

so on their behalf.

|  |  |  |  |
| --- | --- | --- | --- |
| Signed (Reviewee) | Signature: |  | Date |
| Signed (Reviewer) | Signature: |  | Date |
| Signed  (Agreed line manager) | Signature: |  | Date |
| Recorded in People & Money (see guidance [here](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides)) | | |  |

**SECTION 3: ASSESSMENT AGAINST PREVIOUS YEARS’ OBJECTIVES**Progress against agreed objectives including any issues or obstacles which many have impeded progress. To be completed by Reviewee and submitted to Reviewer at least 7 days in advance of PandDR meeting.

|  |  |
| --- | --- |
| 1. Objective |  |
| Progress |  |
| 2. Objective |  |
| Progress |  |
| 3. Objective |  |
| Progress |  |
| 4. Objective |  |
| Progress |  |
| 5. Objective |  |
| Progress |  |
| 6. Objective |  |
| Progress |  |

**SECTION 4: COMPETENCIES: LEADERSHIP, TECHNICAL & PROFESSIONAL COMPETENCIES**

For use where Reviewee is in a management/leadership role and/or where the business is using the competency framework to assess and develop technical and professional competencies as part of the PandDR process. To be completed by Reviewer during/following the PandDR meeting.

|  |
| --- |
| Competency Commentary |
|  |

**SECTION 5: REFLECTION ON LEARNING AND TEACHING CONTRIBUTION, EVALUATION AND PLANNING**

**(a) TEACHING: Where Reviewee is involved in any undergraduate (UG) or postgraduate (PG) teaching.**

Should also include engagement with the Peer Observation of Teaching scheme at least once in the current academic year.

**Where reviewee does not already hold PGCAP/HEA fellowship (or equivalent), this section should include their plans to engage with the relevant level in the coming year.** This includes reviewees with a predominantly PG teaching role as they are also strongly encouraged to hold PGCAP/HEA fellowship.

To be completed by Reviewee prior to the PandDR meeting.

|  |
| --- |
| Reflection on learning and teaching contributions, evaluations and plans for future development.  Please insert date of last Peer Observation of Teaching exercise |
|  |

**(b) PG SUPERVISION: Where Reviewee is involved in PG supervision (MSc [PGT or PGR] or PhD)**

To be completed by Reviewee prior to the PandDR meeting.

|  |  |
| --- | --- |
| Reflection on supervision in past year and future plans | |
|  | |
| If you are currently supervising a PhD student, please insert approximate date of last PhD supervisor training course that you attended:  (**Please note you MUST attend a refresher course every 5 years)** |  |

**SECTION 6: ACTIVITIES PROMOTING IMPACT AND ENGAGEMENT**

To be completed by the Reviewer during/following the PandDR meeting.

|  |
| --- |
| Impact and engagement activity (an effect on: 1. Practice and practitioners; 2. Policy; 3. Commercialisation and translation; 4. Public, patient and community engagement; 5. Education.) |
|  |

**SECTION 7: CITIZENSHIP**

To be completed by the Reviewer during/following the PandDR meeting.

|  |
| --- |
| Reflection on contributions to your School/Deanery, College and/or the University as well as professional activities outside the University which may include: contributions to equality, diversity and inclusion; mentorship; professional activities; membership of internal/external boards, committees and advisory panels; involvement in professional societies. |
|  |

**SECTION 8: OBJECTIVES FOR FORTHCOMING YEAR**

To be agreed during the PandDR meeting and completed by Reviewee/Reviewer during/following the meeting.

|  |
| --- |
| Max. 6 objectives |
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |
| 6. |
| 7. To comply with all responsibilities, relevant to my role, stated within the UoE H&S Policy including risk assessments and maintaining a training record. |

**SECTION 9: CAREER ASPIRATIONS, FUTURE PLANS AND PERSONAL / PROFESSIONAL**

**DEVELOPMENT NEEDS FOR FORTHCOMING YEAR.**

To be agreed during the PandDR meeting and completed by Reviewee/Reviewer during/following the

meeting.

Please note that the University has signed The Concordat to Support the Career Development of

Researchers. The Concordat states that research staff should have ‘opportunities, structured support,

encouragement and time to engage in a minimum of 10 days professional development pro-rata per year’ for

career development activities. (A non-exhaustive list of example activities for these development days can be

found at: <https://www.ed.ac.uk/researchers/career-development/10-days-professional-development>)

|  |
| --- |
| Future plans and agreed training or developmental requirements (brief description of development needs or learning gap) and how the allocated [10 days professional development](https://www.ed.ac.uk/researchers/career-development/10-days-professional-development) will be used for this, including details of courses and dates. If required use a Personal Development Plan (PDP) template. |
|  |

**SECTION 10: SUMMARY - OVERALL ASSESSMENT OF PERFORMANCE**

|  |
| --- |
| Reviewer – to be completed by Reviewer following the review meeting |
|  |
| Reviewee – to be completed by Reviewee following the meeting |
|  |

**Mentoring Opportunities**

The University runs a “Mentoring Connections” programme open to all staff. The programme provides all staff with the time and space to meet with a mentor/mentee to talk through a variety of issues that affect them at various stages of their career and development.

For further information please visit: <https://www.ed.ac.uk/human-resources/learning-development/other-development-options/mentoring-connections>. Both new mentees and mentors are encouraged to apply.