

**Performance & Development Review**

The [Hallam Deal](https://blogs.shu.ac.uk/hallamdeal/?doing_wp_cron=1521037581.4430229663848876953125) sets out the University's commitment to you and what the University expects in return. The Performance & Development Review (PDR) supports that two way commitment, through recognising your achievements and setting out clear and focused objectives.

The purpose of the Performance & Development Review (PDR) is to align your personal performance and development with that of [Transforming Lives](https://portal.shu.ac.uk/departments/bis/pt/PIP/PIPW1/Portfolio%20Stakeholder%20Engagement%20%20Comms/Strategy%20-%20final.pdf). The [Performance & Development Review Toolkit](https://blogs.shu.ac.uk/shupdreviewtoolkit/?doing_wp_cron=1522832680.6540420055389404296875) provides you with information and helpful resources when preparing for your review.

In support of Transforming Lives, the PDR enables you and your manager to have meaningful conversations throughout the year about achievements, developments and is complemented by regular one-to-one discussions and aids self-reflection.

Additionally, the annual review conversation considers the future, identifying priorities and setting out SMART[[1]](#footnote-1) objectives, including development needs for the year ahead.

In advance of the review meeting, the reviewee should complete sections 2, 3 and 4 and then send this draft of the form to their identified reviewer at least 7 working days before the date of the meeting to help them also to prepare effectively. Additionally, the reviewee should be ready to attend the meeting with initial thoughts associated with section 1. It would also be helpful to let each other know about any other aspects either party wishes to discuss e.g. any development opportunities, career aspirations or challenges being faced. Following the review meeting, it is the reviewee's responsibility to have fully completed the review paperwork as a record of the discussion, forwarding this to the reviewer, who will complete their reflections in the summary of overall performance.

***Each year you will start a new form, setting your objectives at the beginning of the year (section1), carrying out your continuous reflection throughout the year (section 2) and then completing the year by capturing your summary of overall performance & achievements (section 3).***

If you require any further assistance accessing these documents or have specific requirements (e.g. large print format) please contact the People Development Team on ext. 3948.

**Section 1: Annual Objectives 2019/2020**

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| **Name of Reviewee:** | **Role Title:** |
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| **Annual Work Objectives 19/20** | | | *Use this space to identify and agree future work objectives with your manager. These activities will contribute to the achievement of faculty/directorate and team business plans and be clearly aligned to the priorities underpinning* [*Transforming Lives*](https://portal.shu.ac.uk/departments/bis/pt/PIP/PIPW1/Portfolio%20Stakeholder%20Engagement%20%20Comms/Strategy%20-%20final.pdf) *and may be shared within your team. Focus on 5 or 6 with a maximum of 8 individual SMART[[2]](#footnote-2) objectives to enable you to achieve the required performance in your role. If these change or evolve throughout the review period please note the amendments below. The outcome achieved column should be completed as part of the annual review.* | | | | | | |
| **Objective** | **Transforming Lives priority** | **How does this support your faculty/directorate/team objectives?** | | | | **Expected outcome/ impact** | **Timescale** | | **Outcome achieved (met/not met/ongoing[[3]](#footnote-3))** |
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| ***Equality, Diversity & Inclusion Objective:*** |  |  | | | |  |  | |  |
| ***Please use this space to note any amendments to objectives during the course of the year*** | | | | | | | | | |
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| **Career, Professional & Development Aspirations** | *Use this space to identify any areas of strength and development and agree objectives to support this (in the context of budgetary availability and authorisation considerations). In your current role consider which of the capabilities within the* [*Professional Services Capability Framework*](https://blogs.shu.ac.uk/shupdreviewtoolkit/professional-services-capabilities-framework/?doing_wp_cron=1551881000.9331901073455810546875) *will help you be most effective and which will support any future career aspirations. These will be shared with the faculty/directorate leadership team members where appropriate to enable a training and development plan to be developed. Further guidance is available for* [*reviewees*](https://blogs.shu.ac.uk/shupdreviewtoolkit/files/2019/02/Guidance-for-Individuals-on-the-Capability-Framework.pdf) *and* [*reviewers*](https://blogs.shu.ac.uk/shupdreviewtoolkit/files/2019/02/Guidance-for-Managers-on-the-Capability-Framework.pdf)*.* | | | | | | | | |
| **Resources/support needed including outcome to be achieved** | **Development activity required**  (*e.g. join a professional network, lead a cross-functional project, attend training)* | | | **Resources/support needed** | **Measure of success** *(e.g. a professional network is creating opportunities, or new skills are being applied)* | | | **Timescale** | |
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**Section 2: Reflection on Performance & Development**

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| **Continuous Reflection on Performance & Development** | *With reference to the bullet points below use this space to record throughout the year what you have achieved, successes and challenges in relation to the objectives captured above. These should be discussed in your 1:1s and will help inform the annual review discussion with your manager.*  *In doing this you might want to include:*   * *Your personal contributions or achievements in relation to faculty/directorate/team/individual objectives and the impact that this has had* * *Reflections on the* [*Professional Services Capability Framework*](https://blogs.shu.ac.uk/shupdreviewtoolkit/professional-services-capabilities-framework/?doing_wp_cron=1551881000.9331901073455810546875) *demonstrated - it is important to consider both what you do as well as the how* * *Any stakeholder feedback received* * *Any challenges you have faced and how you have overcome these* * *Reflections on what you have learned or how you have developed* * *Upward/sideways feedback that you have provided and the impact that this has had* * *Progress against your career, professional & development aspirations and any next steps* |
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**Section 3: Summary of Overall Performance & Achievements**

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| **Name of Reviewer**  **(Line Manager):** | **Role title:** | **Period covered by the review:** | | **Date of review:** |
|  |  | **From:** | **To:** |  |

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| **Reviewee** | *This section is for you to provide evidence demonstrating achievement against your objectives during 2019/2020, which will then be discussed at the review meeting with your manager. When reflecting on last year's objectives please reflect on your personal contribution or achievements in relation to faculty/directorate/team objectives which are aligned to* [*Transforming Lives.*](https://portal.shu.ac.uk/departments/bis/pt/PIP/PIPW1/Portfolio%20Stakeholder%20Engagement%20%20Comms/Strategy%20-%20final.pdf)  *Ensure you've updated the met / not met column for each objective (section 1). Use this space to record the themes you've noted during the year, and consider these when discussing your objectives and development for the following year.*  [*(Further guidance is provided in the Performance & Development Review Toolkit).*](https://blogs.shu.ac.uk/shupdreviewtoolkit/) |
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| **Reviewer** | *Use this space to record progress against objectives, identify future expectations, support provided and any other feedback you would like to give your member of staff.* |
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**Section 4:** **Completion of required university training/and specialist subject/professional requirements to maintain good standing**

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| **Description** *- Please note the dates of mandatory training or any role specific training below.*  *All the following mandatory training should be completed every 2 years:*   * *DSE, Fire Awareness & Prevent (accessed through* [*BeOnline*](https://shu.awaken-be.com/)*)* * *Unconscious Bias & Equality Essentials (accessed* [*here*](https://portal.shu.ac.uk/departments/HRD/equality/Pages/Staff%20Training-.aspx)*)* * *Recruitment & Selection - Chairs of Panels (accessed* [*here*](https://my.corehr.com/pls/coreportal_shup/cp_por_public_main_page.display_login_page)*)* | **Status Completed Yes/No** | **Date Completed** | **Review Date** |
| DSE Workstation Training & Self-Assessment |  |  |  |
| Fire Awareness |  |  |  |
| Prevent |  |  |  |
| Unconscious Bias 1 (all staff) |  |  |  |
| Unconscious Bias 2 (specific to those in a management role or have responsibility for recruitment) |  |  |  |
| Equality Essentials |  |  |  |
| Recruitment & Selection - Chairs of Panels |  |  |  |
| GDPR |  |  |  |
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1. *Please see Guidance for Setting SMART Objectives in the toolkit.* [↑](#footnote-ref-1)
2. *Please see guidance for setting SMART objectives and the embedding equality objectives guidance which can be found within the performance and development review toolkit.* [↑](#footnote-ref-2)
3. *If it is an 'ongoing' objective and the timescales expand outside the review year please ensure you provide an overview of progress made within this review year.* [↑](#footnote-ref-3)