ACADEMIC PERFORMANCE DEVELOPMENT REVIEW - REVIEWER GUIDE

INTRODUCTION

The Performance Development Review (PDR) is an important process in the University to provide a focus for staff to reflect and talk about their work, contribution and career development. The PDR also ensures that staff are clear about their objectives and expected contributions to achieve the University's objectives.

In the PDR you provide staff with feedback about their work, what helps and what hinders their ability to contribute effectively and identify appropriate professional development and / or support.

The process gives you the opportunity to encourage and motivate staff to achieve their objectives and examine not only their short term objectives, but also to encourage staff consider what professional development they should undertake to enhance their long term career development.

The information noted in the PDR can also support broader processes such as; progression, promotion and addressing staff professional development needs.

Please ensure that as part of the Review you discuss the University's overall strategic objectives and the Reviewees contribution to achieving those objectives. It is strongly recommended that this discussion is held early in the Review to provide a context for the discussion.

The PDR form has the following sections to complete:

- **Section A** – is **a review of the previous period's activities**. In this section the reviewee should review their progress against the agreed objectives of the previous year and examine any factors that influenced the achievement of those objectives.

- **Section B** – is an **outline of the level and scope of the previous period's activities**.

  Please note that Sections A and B can be used as evidence for other HR processes such as promotion and progression.

- **Section C -** here the reviewee notes their **objectives for the following period** and, where relevant, place these in the context of their long-term career development. They should also note any professional development they wish to undertake to further enhance their professional skills and knowledge.

- **Section D** – This section contains a **brief summary of the PDR meeting and confirms that the objectives noted in the previous section have been agreed**. The reviewer completes this section.

- **Section E** – allows you or the reviewee **to include any additional comments** that have not been addressed in the previous sections.

The PDR form should be completed within two weeks of the meeting and signed and agreed by the reviewer and reviewee.

SECTION A - REVIEW AND CONTRBUTION

The purpose of Section A is for staff to summarise their contribution since their last PDR and note their achievements and contributions against relevant key areas of activity and their objectives agreed in their previous review.

They should also summarise the factors that contributed to their ability able to undertake their role effectively and identify any factors that may have hindered their ability to undertake their role as well as had hoped during the last period.

Also included in this section is an opportunity for the mentor to briefly summarise discussions with the reviewee during the period. This is to ensure that the reviewer is aware of the advice and support provided in order to inform future objectives for the next period.

During the review, discussions based around this section will generally examine the factors that impact on their role and how they can best be supported. However, it is important to note to staff the broader requirements of the School and College and recognise that solutions to some issues may not be easily addressed.

SECTION B - SUMMARY OF ACTIVITY

The aim of this section is to enable staff to note the level and range of their activity.   Not all areas will be relevant to each role but the information is meant as a general guide regarding the type of information needed in each section. The information below has been taken directly from the University's Senior Academic Promotion Criteria.

1   TEACHING AND LEARNING

1.1	• Please list evidence of all teaching responsibilities on taught courses both at UG and PG levels for the previous review period. • As the current year's contribution may be incomplete please add a brief paragraph of the year's activities and particularly note any significant developments from previous years. • Include your most recent QA2 forms and statistics or summaries (e.g. ARQUE) regarding student evaluation of your modules. Evidence may also include feedback from mentors, feedback from course committees, staff-student consultations, peer review, feedback from external examiners. *This information may be produced on a separate page / appendix if easier.*
1.2	• Note any particular contributions to the School / College through programme development and assessment, time tabling and examination procedures and general management of teaching. • Also highlight the range of teaching contributions such as lectures, seminars, practical classes and field trips and work in continuing education and short courses. • Note any relevant contributions in terms of Welsh language teaching and programme development, including collaborative teaching and supervision with other institutions (in Wales and further afield).
1.3	This should include any innovative interventions such as: • new ways of delivering complex information; • using technology as a teaching aid; • assessment practices; • training activities; • awards such as Teaching Fellow; • contributions to short courses and links with industry / public sector • teaching outside the College; • Securing teaching grants and contracts and funding for teaching-related projects in Welsh / English; • Interdisciplinary teaching and Inter-institutional teaching. • Provide examples of contributions to the pedagogy of the subject area / professional practice.

1.4		Provide a brief outline of your contribution to teaching and learning.

2   RESEARCH

2.1		Provide a brief summary of your current research plan.
2.2		Place all your publications **from the current review period** in chronological order and in each category following the appropriate referencing style for your academic field. Please note the classification system for each publication listed. It may benefit your submission to include data on journal impact factors and citation metrics where these are widely used in your field.

- Commissioned research projects will be accepted as evidence of research activity. Please note if these have been accepted or are under review.
- Please note if the journal is academic, professional or popular.

Where possible, candidates should apply the following classification system for each publication listed as below:

(A) – A publication which is recognised as a major contribution to a subject either in breaking new ground or as a definitive study. A widely quoted review of the subject. This is equivalent to three star or above in REF terms. Outstanding papers can be designated A+.

(B) – A paper in a major journal containing substantial new material or a new interpretation and / or analysis. Possibly part of a series of studies making a substantial whole. This is equivalent to two star or above in REF terms.

(C) – A paper containing major modifications of technique, or the extension of an application which may include additional and useful but minor accumulation of data. A fairly brief clarification of, or comments on, other work. A substantial book review which carries a topic or issue a stage further.

(D) – A preliminary communication, ephemera, conference abstract, purely expository articles or a book review (other than a brief notice).

The sources of information (depending on your subject area) can include:

PUBLICATIONS:

- Books, monographs, edited works, book and chapter contributions,
- Journal or letter articles (please note if the journal is academic, professional or popular);
- Contributions to published conference proceedings.

Please state if you are an editor or referee for any learned journals or Publishers

CONFERENCE CONTRIBUTIONS:
Presentations at and / or organisation of conferences.

SUBJECT SPECIFIC CONTRIBUTIONS:
Departmental / Research Working Papers, official Reports – note whether published or unpublished but public, exhibitions, commissions, performance, engineering designs, translations, audio-visual material, computer software/ language, musical compositions scores and scripts.

2.3	• Include details of all funding applied for within the year indicating outcome within the last three years. Research funding, broken down year by year should indicate the role of the applicant within group funded research.
	• Outline of commercial activity includes KTP activity, exploitation of IP, patents etc.
	• Research and funding awards for postgraduate researchers in your field (e.g. AHRC/ESRC and Y Coleg Cymraeg Cenedlaethol studentships).
2.4	Note all non-taught post-graduate students that you have supervised and are currently supervising. Please note the level at which you have supervised, e.g. Master's / PhD.
2.5	Note what responsibilities you have held in the last year in terms of leading a research group and note level of involvement and scale or responsibility.

3 LEADERSHIP AND WIDER CONTRIBUTION	
	Leadership at all levels and contribution to the broader functions of the University is extremely important in supporting the efforts of the University to enhance; research, teaching, the student experience and support colleagues in the management of the University. There is an expectation that all academic staff contribute to the management and broader activities of the school. This is to ensure equitable workloads and a reasonable distribution of leadership roles. In this section note your contributions over the last period. Examples of what can be included are noted below:
3.1	• **School** – Course Director, UCAS/Admissions Officer, Year Tutor, Module Co-ordinator, Senior Tutor, involvement in the admissions process, organisation of examinations, timetabling, contribution to student recruitment and to accreditation /QA procedures.
	• **College** – Member of College Research Committee / Teaching and Learning Committee, Teaching Co-ordinator.
	• **University** –Member of Senate, membership of committees and task groups. Trades Union activity – note any current and recent main union role(s) and activity.
	Also, please note your contribution to open days during the year.
3.2	**External**– external examination duties in other Colleges **/** Universities, conference organisation, professional service to other organisations, membership of Government enquiries, national organisations, commissions or committees, services to the local community and voluntary bodies / public authorities serving the needs of the locality.
3.3	Here staff are required to note the consultancy work they have undertaken during last PDR period and clearly state if any conflict of interest arose.

4 CONTINUOUS PROFESSIONAL DEVELOPMENT	
4.1	The University encourages staff to attend conferences and research seminars and undertake CPD activity and these activities should be noted in this section.
4.2	The impact of any significant time away from work e.g. maternity / paternity leave that staff have taken over the last three years (including the current year) should be noted and the impact of this should be discussed and addressed in the PDR. If staff have had some time away from their regular duties it is very important to discuss with them how you can best support them to resume their full range of duties as quickly and as effectively as possible.
4.3	If staff have recently returned from a sabbatical you should review the original objectives of their sabbatical and how were they met.

4.4	Membership of professional and learned societies (joined during the last PDR period).
4.5	The aim of this section is to ensure that staff are/ have undertaken relevant contractual, mandatory and compliance training relevant to their role. This section is particularly relevant during the probationary period. **Contractual Requirements:** • **PGCert(HE) and HEA Fellow –** note progress to achieve the relevant qualification / accreditation. • **Welsh language** – if there is a requirement to reach a specific competency level in the Welsh language the Annual Development Plan must be discussed in this section and actions agreed to support the reviewee to achieve the required standard. The member of staff will have a Development Plan agreed with the Welsh Language Tutor. It is advised that you discuss the Action Plan with the Welsh Language Tutor beforehand so that you are clear about the Reviewees progress. **Mandatory Requirements:** The University requires staff to undertake mandatory training as required by law such as health and safety training. Also, in order to comply with equality legislation that aims to identify, tackle and eradicate unlawful discrimination and to help the University develop an inclusive workplace, the first step is to increase staff; knowledge, understanding and skills in this area. . Topics in this area therefore include: • On-line Equality Module (All staff) • Equality for Managers (All managers) • Health and Safety Induction (All staff) • Job / Role Specific Training (including additional Health and Safety training requirements) • Computer User Training (All relevant staff) • University and Department/School/College Induction Please note that the Health and Safety induction takes part in the University's 'Welcome Programme'. **Compliance Training:** Compliance training is training that is enshrined within University policies or it may have otherwise been determined as being good practice to which the University should adhere. It is concerned with minimising risk, providing assurance that policies are followed, and ensuring the University meets internal or external standards (which might include meeting needs arising from particular legislation). In this area the following training should be undertaken: • **Recruitment and Selection** - for all staff who take part in the recruitment and selection process. • **Data Protection** – for staff who deal with and manage any kind of personal information. • **Freedom of Information** – for managers and front line staff who may receive or are asked to deal with a Freedom of Information request. • **Child Protection** – for any staff who deal with children as part of their role. • **Prevent Training –** for all front line and academic staff for whom knowledge about Prevent is necessary. *If the member of staff has not completed the necessary relevant training, actions to undertake the training must be noted in Section C, 1.4 and be completed in the next period.*

SECTION C – LOOKING FORWARD

1 AGREED KEY OBJECTIVES FOR THE FOLLOWING PERIOD

When discussing this section you should refer to the University and the College's key objectives for the period and discuss with the reviewee their contribution to achieving those objectives and their personal goals for the following period.   The goals should be clear with a reasonable timeline to achieve those objectives.

You should also discuss with them their professional development. Useful links for information for this section can include the following web sites: Staff Development , CELT, Coleg Cymraeg Cenedlaethol, Vitae and the HEA.

In the Professional Development and Essential Training section the professional development objectives for and the Essential Training that should be undertaken should be noted.

2 CAREER DEVELOPMENT

This section is not compulsory but staff may find it helpful to discuss with you their long term career development and what actions they need to take in the medium to long term (between two and five years) to enhance their career development.

For this section you can also refer staff to the senior academic promotion criteria in order to review their progress and identify any potential issues that may impact on future applications for progression and promotion.

SECTION D – OUTCOMES

This section contains a brief summary of the PDR meeting and confirms that the objectives noted in the previous section have been agreed – this should also include professional development objectives and additional support. The reviewer completes this section.

If the reviewee wishes to share the outcomes of the review with their mentor it is their responsibility to forward the outcomes. This maybe useful as a focus for future discussions.

SECTION E – ADDITIONAL COMMENTS

This section allows you and / or the reviewee to note anything that may not necessarily be covered in the other sections. This could include any observations or disagreements raised during the PDR.

When you and the reviewee have agreed the content of the PDR and agreed the objectives the form should be signed kept with the reviewer and reviewee or according to the College's / School's procedures.