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##### **ANNUAL PROGRESS REVIEW FORM**

This document is a formal record of the annual progress review discussion that has taken place and the conclusions reached.

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| Employee: |  | Job Title: |  |
| Reviewer: |  | Date of Progress Review: |  |

**Part 1 Performance Review**

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| **SECTION A: PERFORMANCE REVIEW** |
| **Performance from the previous year and any Final Probationary Review Objectives**  Objectives set at the last APR or Probation Review should be listed below with a commentary on achievement, together with any comments on performance generally resulting from the discussion between the manager and employee. |

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| 2. The Employee and Reviewer should jointly discuss and identify any CPD activities that are appropriate for the next academic year. |
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**Digital Capabilities Discovery Tool**

This section should be used to record the digital development objectives for the next 12 months as identified by completing the overall digital capabilities on the JISC discovery tool.

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| **Employee Objectives** | **Measurement of Success** | **Date for achievement** |
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PART 3

Objectives

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| **THE FUTURE** | | |
| **Objectives for the coming review period**  This section should outline a new list of relevant personal objectives for the next 12 months.  (*Note: carry forward any unachieved objectives from Section A, if still relevant*) | | |
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| **Employee Objectives** | **Measurement of Success** | **Date for achievement** |
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**Part 4 – Competencies**

This section should be used to record any discussions relating to performance against the HERA competencies where it is identified by the manager that they are not being met. Appendix 1 of the Guidance details the HERA competencies and gives examples of behaviours that may be expected from staff in relation to them.

Please clearly indicate which elements you have discussed with the employee. Any agreed actions set in relation to these should be noted in the areas below and reviewed as a target in the following year.

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| --- | --- |
| Communication | Team Work and Motivation |
| Liaison and Networking | Service Delivery |
| Decision Making Processes and Outcomes | Planning and Organising Resources |
| Initiative and Problem Solving | Analysis and Research |
| Sensory and Physical Demands | Work Environment |
| Pastoral Care and Welfare | Team Development |
| Teaching and Learning Support | Knowledge and Experience |

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| Comments: |

**Part 5**

**University Values**

These will usually only be discussed if circumstances have led to the manager identifying that the values need re-enforcing.

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| Comments: |

**Part 6**

**Student Focused Approach**

Consider the way in which the work of the individual balances achieving effectiveness in their role with contributing to improving the student experience.

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| Comments: |

**Part 7**

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| **Overall Summary and comments**  *This section should be used to summarise the performance review and record any other issues which are discussed such as reviewing reasonable adjustments for a disabled employee, any health or well-being concerns or a review of any previous performance discussions.*  Reviewer’s Comments  Employee’s Comments    Signed Employee………………………………..Signed Reviewer…………………………..  Date………………………………………………. Date…………………………………………  ***Please ensure that a copy of this document is retained by the employee and manager with a copy sent to Human Resources*.** |

**Thank you for taking the time to complete this form and if you have a query please contact HR on 2028012.**