# Making the Most of Annual Review (P&DR) for CSE Research Staff: Guidance for Reviewers and Reviewees

## Background

In CSE we recognise that Research Staff are vital for delivery of research, and seek to ensure that Researchers are well supported in their current roles, and also receive the advice and support that they need to develop their future careers, whether they are aiming for a career in or beyond academia.

As a signatory to the [Researcher Development Concordat](#), the University has a commitment to support Research staff careers, recognising the importance of professional development and supporting this as a continuous process, allowing staff to consider all possible career paths and options.

Like other staff members, Researchers should have an Annual Review, Performance and Development Review (P&DR) during the summer but prior to the 31st July each year.

This guidance sets out the process for the Annual Review (P&DR) and the various support and resource provisions available for the reviewer and reviewee.

## Annual Review (P&DR)

The Annual Review (P&DR) is an important reflection point for employees and line managers/reviewers (normally the PI for Research staff) to have a good quality, meaningful and honest two-way conversation.

In line with the University's [Code of Practice](#) for the management and career development of Research staff, annual review arrangements for Researchers must cover two distinct sets of goals, those related to the progress of the research project and those which focus on the wider career and personal development of the Researcher beyond the current project. It is also important to schedule regular progress meetings.

The Annual Review (P&DR) provides an excellent opportunity to encourage active engagement from an early stage with opportunities that can enhance Researcher experience and performance in their current role and help transition to their next role.

## Making the Most from the Annual Review (PD&R)

The steps and recommendations below are designed to support both the reviewee and reviewer in getting the most from the Annual Review (P&DR).

1.  **Step 1 - Planning the Annual Review (P&DR)**

In advance of  the review, the reviewee and reviewer should familiarise themselves with the University's [Code of Practice](#) for the management and career development of Research staff and in particular the section on Annual Review (P&DR). Within the University's [Research Staff Hub](#) there is [Annual Review Guidance for Researchers](#) with a 5 step process as well as toolkits and resources to help you have a quality review conversation. This is also aligned the University's Annual Review guidance for all staff.

Annual Review guidance, useful checklists to help prepare and conversation resources can also be found on the University's [Conversations Hub](#).  Within the hub there are also links to the various sources of learning and development offered within the University.

Each School has its own recommended form which is used to structure the Annual Review (P&DR) discussion, and the one appropriate to your School should be used.

The IAD (Institute for Academic Development) provides a range of tailored workshops, advice and other opportunities for academic Research staff including a Brochure that can be useful to identify relevant training and development opportunities.

The IAD generated 'Beginning your research position' and 'Thriving in your research position' guides will also be helpful for reviewees. Before the review meeting we would encourage the use of the associated activity sheets within these guides to enhance **reflection on resilience, research activity & career**.

The Code of Practice provides a structure designed to identify specific Researcher training needs, and if completed the '*Thriving in your research position*' activity sheets will help to shape discussion around development & careers.

In all cases, the reviewee should **identify key personal professional objectives** for the coming year and **develop a plan for use of their dedicated** professional development days; these will be discussed during the review meeting.

Please ensure the School Annual Review (P&DR) form is completed (as fully as possible) and shared with the reviewer before the scheduled Annual Review (P&DR) meeting. The reviewer will communicate the timeline for submission, but it should be provided in advance to allow adequate time for review and conversation planning.

## 2. Step 2 - During the Annual Review (P&DR)

The Annual Review Guidance for Researchers sets out the 5 steps for what the review should cover in detail and these are summarised below:

➢ 1. Reflect back (key achievements, key challenges and key changes)
➢ 2. Provide Feedback (on objectives and behaviours demonstrated)
➢ 3. Plan and set objectives (share priorities, set objectives and agree expectations)
➢ 4. Identify development objectives (discuss; career objectives, learning and development support available and the 10 days professional development entitlement, pro rata per year
➢ 5. Agree when and how to review progress (check ins during the year)

Please refer to the School Annual Review (P&DR) form to structure the conversation.

You might also discuss the value of mentoring and/or training/mentoring opportunities with relevant discipline-specific professional bodies or external organisations.

The review is an ideal time to also check in on wellbeing of the Researcher.

## 3. Step 3 - After the P&DR

There will be an opportunity for reviewee and reviewer to complete an overall record of Annual Review (P&DR) discussions and to finalise and agree the Annual Review (P&DR) form

Forms and any supporting evidence are stored within Schools or departments (e.g. Employee SharePoint) and you should keep a copy for future reference. Employees (i.e. reviewees, Researchers) are strongly encouraged to use People & Money to record Annual Reviews.

## Useful Links

**Research Staff Hub** https://www.ed.ac.uk/researchers

**IAD Code of Practice for the Management and Development of Research Staff**
https://www.ed.ac.uk/institute-academic-development/research-roles/research-only-staff/advice/codes/code-practice

**IAD Guide for New Researchers in Edinburgh**
https://www.docs.hss.ed.ac.uk/iad/Researchers/Research_staff/Beginning_your_research_position_Aug23.pdf

**IAD Thriving in Your Research Position**
https://institute-academic-development.ed.ac.uk/sites/default/files/2024-02/Thriving%20in%20your%20research%20position.pdf

**IAD Research Staff Training Brochure**
https://www.ed.ac.uk/institute-academic-development/research-roles/brochures

**Edinburgh Research Office 'Support for Researchers' Blog**
https://uoe.sharepoint.com/sites/ERO