**University of Otago Professional Staff**

**Performance and Development Review Form**

This form is to be completed by the reviewer with the staff member as part of the PDR, and signed off by the staff member and reviewer. A completed copy should be kept by the reviewer.

Please refer to the PDR website for more information: [www.otago.ac.nz/humanresources/pdr](http://www.otago.ac.nz/humanresources/pdr)

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| --- | --- | --- | --- |
| **Name:** | {staff\_name} | **Employee No:** | {employee\_id} |
| **Position Title:** | {pos\_title} | **Department:** | {p\_department} |
| **School / Division:** | {division} | **Date of Review:** |  |

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| **Section A – Reflection (to be completed by reviewee/reviewer)**  Refer to the previous PDR and progress updates, expected outcomes and job description. Use the PDR competency descriptors and the PDR guidelines as a guide to help describe and assess the performance level |
| **Outcomes and competencies: Assessment of performance level and summary of PDR discussion** |

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| **Section B - Overall assessment of performance level (to be completed by reviewer)** | | | | |
| |  |  | | --- | --- | | **Performance Level** | **Definition** | | **Outstanding** | Consistently achieves all their outcomes as described in the ‘outstanding’ performance descriptions. The key outcomes are recognised as exceeding the normal expectations for the role. | | **Exceeds expectations** | Achieves some outcomes that are recognised to be beyond the requirements of the role as described in the ‘outstanding’ performance descriptions for key competencies, and balanced with outcomes achieved at the ‘fully competent’ level for other competencies. | | **Fully competent** | Achieves all expected outcomes to a high standard as described in the ‘fully competent’ performance descriptions. Performance assessed at this level is considered as meeting normal expectations for the role. | | **Working satisfactorily towards full competence** | Achieves some expected outcomes and demonstrates full competence in some areas as described in the ‘working satisfactorily towards full competence’ performance descriptions. Development is required in some areas of the role but progress towards ‘fully competent’ is evident. | | **Requires Improvement** | Does not achieve some expected outcomes; performance is as described in the ‘requires improvement’ performance descriptions. Development is required in some key areas of the role, but improvement is not evident. |   **Select ONE Performance level below** | | | | |
| **Requires improvement** | **Working satisfactorily towards full competence** | **Fully competent** | **Exceeds expectations** | **Outstanding** |
| Comments: | | | | |

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| **Section C - Salary Review** | | | | | | | | |
| **Level  (1-8)** | | {cls} | **Step at  01 August** | {stp} | **FTE Salary at  01 August** | {salary} | **RECOMMENDATION** |  |
| **Option 1: Increase approved by Head within appointment range.**  Head will provide the staff member with a confirmation letter by 01 December | | | | | | **New step** (within appointment range):  **New FTE salary:** | **$** |
| **Option 2: Increase approved by Divisional Head within merit range.**  Head will provide the staff member with a confirmation letter by 01 December | | | | | | **New step:**  **New FTE salary:** | **$** |
| **Option 3: No increase awarded** | | | | | | **Tick Box** |  |
| **Option 4: Top of range (no increase possible)** | | | | | | **Tick Box** |  |

**THE SALARY RECOMMENDATIONS ARE SUBJECT TO REVIEW AND FINAL APPROVAL BY THE DIVISIONAL HEAD.**

**THIS INFORMATION IS ENTERED INTO THE PDR APPLICATION BY THE DEPARTMENT HEAD.**

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| ***Name of staff member*** | *Signature* | *Date* |
|  |  |  |
| ***Name of reviewer*** | *Signature* | *Date* |
|  |  |  |
| ***Name of Head*** | *Signature (Optional – Approved though PDR Application)* | *Date* |

**This is an accurate reflection of the PDR discussion**

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| **Section D – Future planning and development (to be completed by Reviewer with Reviewee)**  Alignment with relevant divisional / departmental priorities and University strategies is encouraged |
| **Agreed goals, objectives and expected outcomes for following year**  **Development opportunities to support the achievement of the above goals, objectives and expected outcomes and opportunities for career growth.**  **Which of the University values and behaviours are going to be the focus this year, both individually and as a team? Refer to the values and behaviours framework that can be found in the PDR website:** [**www.otago.ac.nz/humanresources/pdr**](http://www.otago.ac.nz/humanresources/pdr) |