PS7 – Performance reviews

Research Team Leaders may sometimes find that team members are not performing as expected. It can be difficult to address this, especially if the Leader has project responsibility for team members, but does not line manage them. Additionally, team members may be from outside the institution and subject to totally different operating practices/systems.

A team member will know when he/she is underperforming. However, depending on the reason they may not want to (or feel able to) approach the Research Team Leader. It may also be difficult for the Research Team Leader to approach the problem.

One approach might be to encourage all research team members to routinely complete the attached self-assessment review in preparation for one-to-one project progress meetings. This might allow you and team members to identify and raise problems and generate discussion to help address them. However, there would need to be high levels of trust between the team and the Research Team Leader in order for this to work. You could involve the team in modifying and designing the questions so that they didn't feel imposed. Team members would need to see it as a positive development opportunity and not one linked to appraisal or performance management.

PS7a – Self assessment performance review

Name:

Project title:

Date:

Question 1
List the tasks allocated for completion on this project.
Circle the degree to which you feel you performed in these tasks on a scale of 1-5.
1 – task wholly unachieved
2 – task achieved, but outside agreed timeframe
3 – task achieved just within timeframe, but did not meet all criteria
4 – task achieved within timeframe and met criteria for completion
5 – task achieved within timeframe and exceeded criteria for completion

	Task	Score				
1		1	2	3	4	5
2		1	2	3	4	5
3		1	2	3	4	5
4		1	2	3	4	5
5		1	2	3	4	5
6		1	2	3	4	5
7		1	2	3	4	5
8		1	2	3	4	5

To which of the tasks identified did you allocate a score of 3 or less?

Task no							
	1	2	3	4	5	6	7	8
Tick								

Question 2
List below any problems you encountered with the tasks allocated to you for completion?

What did you do to resolve these problems?

What was the outcome of your actions to resolve these problems?

Question 3

What have you learnt/or gained from participating in this project and undertaking the tasks allocated to you?

Question 4

What actions could you take to improve the scores of those tasks to which you have allocated a low score?

Question 5

Of the options identified in Question 6, which could realistically be used to improve your future performance?

Question 6

What will you do? Have you set a date for this? Whose support do you need and when will you ask for it?