2017 Annual Performance Review Process for Postdoctoral Scholars

Orientation for Postdoctoral Scholars

March 2017
Orientation Agenda

• Purpose of Annual Review
• What to Expect
• Tips For Preparing for Annual Review
• Related Opportunities and Resources/Support
• Development Resources
• Contacts for Questions
The Annual Review will be an assessment of

your research progress and achievements, and of

your professional development during previous performance year

Your supervisor will provide:

- One written annual review in a 12-month period
- Evaluable feedback for developmental purpose
Annual Review Form is divided into six sections:
(You will assess your own progress; supervisor will provide feedback)

1. Research and professional development goals for past review year
2. Progress on research and professional development goals
3. Areas of strength
4. Areas for development (or improvement)
5. Other accomplishments (e.g., publications, presentations, grants written/contributed to, committee work, safety, outreach)
6. Research and professional development goals for next review year
## What To Expect – Annual Review Schedule

<table>
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<tr>
<th>Event</th>
<th>Deadline</th>
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<tr>
<td>Postdocs and Supervisors briefed on review process</td>
<td>March and April</td>
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<tr>
<td>Division launches 2017 Annual Review Process</td>
<td>Early May</td>
</tr>
<tr>
<td>Postdoc receives link via email to automated form and completes self assessment sections</td>
<td>[Due by DATE]</td>
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<tr>
<td>Supervisor receives link and completes written evaluation</td>
<td>[Due by DATE]</td>
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<tr>
<td>Supervisor schedules review discussion with Postdoc</td>
<td>Between [DATE] and [DATE]</td>
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<tr>
<td>Postdoc and Supervisor sign form electronically (via HelloSign)</td>
<td>Due Sept. 5</td>
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<tr>
<td>Postdoc and Supervisor receive electronic copy of signed review</td>
<td>By Sept. 5</td>
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What to Expect - FAQ

- **Review is for developmental purpose.**
- Your Supervisor of record will write your Annual Review, in coordination with your matrix/work lead if appropriate.

- **Postdoc annual performance review period:** July 1 - June 30
  - Written review and discussion with Supervisor will be completed by early September.
  - When completed, you will receive an electronic copy of the review.

- Annual Performance Review form and routing **process is automated via Google Docs**

- **Periodic Progress Assessment** – You may initiate a discussion with your supervisor regarding progress and goals at anytime during the year.
Tips For Preparing For Annual Review

Review

- 6 sections of Annual Review form
- Review schedule on what to expect and when

Tips for preparing to write assessment of your progress

- Gather information:
  - Goals for previous year (e.g., research and professional development)
  - Most significant accomplishments over full duration of previous year (e.g., research, publications, grants, collaborations, projects led, safety, committee work)
- Identify 2-4 of your strengths and 2-4 areas you would like to develop further
- Ideas for next year’s research and professional development goals
- Ideas for your career development and any questions of your supervisor
## Related Opportunities & Resources/Support

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<tr>
<th>Opportunity</th>
<th>Resource / Support Available</th>
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<tbody>
<tr>
<td>Discuss research and progress expectations with Supervisor, if new to your appointment</td>
<td>• If request in writing, complete Section 1 of Annual Review form; to download form go to HR website, to “Postdoc Resources”</td>
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<tr>
<td>• Your may request in writing, if that’s helpful</td>
<td></td>
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<tr>
<td>Develop / draft an Individual Development Plan (IDP), if you would find this helpful</td>
<td>• For IDP form, go to HR website to “Postdoc Resources”</td>
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<td>• Supervisor will respond with further feedback and knowledge about opportunities</td>
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<tr>
<td>Periodically discuss progress with Supervisor throughout your appointment</td>
<td>• Quarterly progress discussion is recommended</td>
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<tr>
<td>• Discuss research progress and overall research objectives</td>
<td>• You may request at any time</td>
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Development Resources

@ A-Z Index, go to:

- **Human Resources website** – Go to “Postdoc Resources,” with links to:
  - Annual Performance Review Process
    - Performance review form (electronic copy of template)
    - Tips sheet for use of Google Docs
  - Individual Development Plan and Guidebook for CAREER Planning

- **Today at Berkeley Lab (TABL)** – Go to “Calendar” for research lectures and activities going on around the Laboratory

- **Postdocs (Berkeley Lab Postdoc Association)**

- **Berkeley Lab Learning Institute (BLI)**
  - Go to “Employee Resources” to “Scientist/Postdoc”
  - Onsite training - Workshops for Postdocs
    - Online training and online books (via Skillsoft)
    - Offsite training options

**NEW - Onsite Training for Postdocs**
- C.A.R.E.E.R. Planning Workshop
  - May 5
  - September 20
  - December 5
  - February 26, 2018
  - 1-on-1 Discussion with C.A.R.E.E.R. Coach
    - Pre-requisite: C.A.R.E.E.R. Workshop
    - Schedule at your convenience
Contacts for Questions

• Regarding Annual Review process – Your local HR Division Partner

• Regarding union contract – Your local union representative