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| --- | --- |
| **Postdoctoral Researcher:** | **Principal Investigator:** |
| **Title:** | **Review Period:** |
| **Date of hire:** | **Review meeting date:** |

Performance & Development is a cyclical process. This form has been developed to help post-doctoral researchers and their faculty supervisors plan for the year and evaluate performance throughout the year. Use the timeline below to determine where we are in the Performance & Development cycle. You can save your progress and return to the form throughout the year. If you have any questions about the Performance & Development process, please contact your [HR Business Partner](https://service.northeastern.edu/hr?id=kb_article&sysparm_article=KB000420053).

## Performance & Development Timeline:

**Click for** [**Expectation Setting**](#_SETTING_EXPECTATIONS_(July/August)) **Click for** [**Mid-Year**](#_MID-YEAR_REVIEW_(December/January)) **Click for** [**Evaluation**](#_YEAR-END_ACCOMPLISHMENTS_(March/Apr)

While the visual gives you an overall sense of what happens when, it’s important to review performance and solicit/provide feedback regularly throughout the year.

As always, check with your local division/college for any internal deadlines.

## Resources and Training

There are a number of resources and training materials to guide you through the cycle:

* The PhD Network offers the [LEADERs](https://nam12.safelinks.protection.outlook.com/?url=https%3A%2F%2Fphd.northeastern.edu%2Fleaders%2Fpostdocs%2F&data=04%7C01%7Ce.hughes%40northeastern.edu%7C8fc7480263e44cbca26608d9634b4c20%7Ca8eec281aaa34daeac9b9a398b9215e7%7C0%7C0%7C637649997320406712%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=%2Fh9O1urzXjjhpjsaQzDW3cpSXsoVi41m88Pd7SkdzBY%3D&reserved=0) program that supports researchers like yourself in the annual goal setting process by focusing on professional skill development, including project management, leadership, and goal setting and attainment.  LEADERs also provides you with personal mentoring in order to give you the individualized attention and guidance you need to help you navigate work challenges and career exploration.  Information (including eligibility)  is available [here.](https://nam12.safelinks.protection.outlook.com/?url=https%3A%2F%2Fphd.northeastern.edu%2Fleaders%2Fpostdocs%2F&data=04%7C01%7Ce.hughes%40northeastern.edu%7C8fc7480263e44cbca26608d9634b4c20%7Ca8eec281aaa34daeac9b9a398b9215e7%7C0%7C0%7C637649997320416707%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=XYPsNj5fEd4YS5G8tDDLqmQtAfV6CGloRbBAWsxtA7M%3D&reserved=0)
* [The FAQs and articles in the HR Service Center](https://service.northeastern.edu/hr?id=kb_category&kb_category=27afde96db7b1c10d708175948961912) can provide general information about the cycle and [this article provides specific information and resources](https://service.northeastern.edu/hr?id=kb_article&sysparm_article=KB000017663) around the part of the cycle that we are currently in. [Overview videos and training can be found in our course on Performance & Development](https://northeastern.instructure.com/courses/30214).
* Need to speak to someone about your goals, self-assessment, or evaluation? [Talk to an HR Business Partner](https://service.northeastern.edu/hr?id=sc_cat_item&sys_id=1ba4d67cdb0bd4501aceaf6d13961961&sysparm_category=75baad68db8b94501aceaf6d13961927) and select the inquiry type “Ask an Expert”.

PART I – TO BE FILLED OUT BY THE POSTDOCTORAL RESEARCHER & CONFIRMED BY FACULTY SUPERVISOR AT THE START OF THE FISCAL YEAR

1. Briefly describe your key job responsibilities and planned research for the upcoming year.
2. List any publications, presentations or seminars you plan to write or deliver this year.
3. List any honors and awards you plan to submit work for over the upcoming year.

1. Describe your career goals, along with a rough timeframe. What progress do you plan to make this year?
2. List 3-5 goals you have for the upcoming year. For example, what skills and competencies do you plan to develop? What teaching or mentoring experience, or other professional skills do you plan to seek out in the next year?
3. Describe any other professional or career development topics you would like to discuss with your PI.

PART II – TO BE FILLED OUT BY THE POSTDOCTORAL RESEARCHER IN THE SPRING

& PROVIDED TO FACULTY SUPERVISOR

1. Briefly assess how you completed your key job responsibilities and how your research progressed this year.
2. List any publications, presentations or seminars you have written or given this year.
3. List any honors and awards you have received over the past year.
4. Assess your progress toward your career goals this year. Do you feel that you are making sufficient progress towards these goals?
5. Reflect on the 3-5 goals you had for the past year. What skills and competencies did you develop? What teaching or mentoring experience, or other professional skills did you seek out this past year?
6. Assess where you are in your development. Outline any other professional or career development topics you would like to discuss with your PI.

PART III – TO BE FILLED OUT BY THE FACULTY SUPERVISOR

Please provide comments/ suggestions, and a rating for each section.

1. Assess this postdoctoral researcher’s performance of their key job responsibilities.

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| --- | --- |
| PERFORMANCE | |
| Click or tap here to enter text. | |
| |  |  | | --- | --- | | **Rating** | Choose an item. | | |

1. Assess this postdoctoral researcher’s research progress, based on expected performance.

|  |  |
| --- | --- |
| RESEARCH PROGRESS | |
| Click or tap here to enter text. | |
| |  |  | | --- | --- | | **Rating** | Choose an item. | | |

1. Assess this postdoctoral researcher’s progress toward their career goals, based on expected performance and timetable. Are these goals realistic?

|  |  |
| --- | --- |
| CAREER GOALS | |
| Click or tap here to enter text. | |
| |  |  | | --- | --- | | **Rating** | Choose an item. | | |

1. Assess this postdoctoral researcher’s progress towards independence, based on expected performance.

|  |  |
| --- | --- |
| INDEPENDENCE | |
| Click or tap here to enter text. | |
| |  |  | | --- | --- | | **Rating** | Choose an item. | | |

1. Assess this postdoctoral researcher’s overall performance for the year, based on expected performance.

|  |  |
| --- | --- |
| OVERALL PERFORMANCE | |
| Click or tap here to enter text. | |
| |  |  | | --- | --- | | **Rating** | Choose an item. | | |

1. What are your expectations for this postdoc for the next year?
2. What opportunities for technical learning, acquiring teaching or mentoring experience, or developing other professional skills do you think would be beneficial to this postdoc?
3. Describe any other professional or career development issues you would like to discuss with this postdoctoral advisee.

*Acknowledgement that this review meeting took place*

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Postdoctoral Researcher Signature Date Advisor Signature Date