



Performance Operating Framework 2017-2018 Review

Guidance Document on how to complete the Review Form for Clinical Directorates

It is important that you limit your response to a total of 4 pages (the page limit does not include appendices)

We have produced this document to provide some general guidance on how to complete the documents required from Directorates for the POF 2017-2018 review. We recognise that each Directorate will have very different research goals, and therefore you should feel free to modify the content of your submission appropriately.

1. Executive Summary

- This part of the form should summarise your performance over the past 12 months, covering the highlights of your performance, and the key factors that have influenced this performance.

2. Commentary on your Directorate's Performance against your 2017-2018 Targets (See Appendix 1 for your Directorate's 2017-2018 POF table)

- The CRIO have supplied your directorate's 2017-2018 POF table in Appendix 1. In this section of the form you should comment in detail on your directorate's performance against your directorate POF targets, set in April 2017. You should also comment on any directorate KPIs you have included in your POF table.
- Specifically, you should comment on any targets you have exceeded or not met, and explain what has influenced this performance. Also, how will this affect your directorate's target setting for the coming year?
- Please confirm cross-directorate collaborations, activity and impact on delivery of targets in your directorate.

3. Commentary on your Directorate's Performance against your 2017-2018 Annual Plan (See Appendix 2 for your Directorate's Annual Plan)

- The CRIO have supplied your directorate's 2017-2018 annual plan in Appendix 2. In this section of the form you should comment in detail on how you have performed against each of your directorate's objectives laid out in the annual plan that you submitted last year. Specifically, you should comment on any objectives you have exceeded or not met, and explain what influenced this performance. Also, how will this affect your directorate's annual plan for the coming year?
- Please confirm cross-directorate collaborations, activity and impact on delivery in your directorate in line with your strategy and annual plan.



4. Please provide a commentary of your directorate's research performance against your research income listed within Appendix 2.

- You should comment here on your directorate's research performance against the financial information contained within Appendix 2, highlighting any areas of excellence and impact or challenges you may have.

5. Do you have any other comments you would like to add to your 2017-2018 Review of your POF performance?

- Please state here anything you wish the reviewers to know about your directorate's 2017-2018 performance that you haven't stated already.

Appendices

Appendix 1- Directorate's 2017-2018 POF table

The CRIO has included your directorate's 2017-2018 POF table as a supplementary spreadsheet for easy reference. Please find attached to the e-mail. Please amend this table as required, ensuring that you:

- *Include the raw data behind any changes to the key metrics*
- *Update your directorate specific KPIs.*
- *Update the Patient and Public benefits section at the bottom of your POF table.*



Appendix 2 - Directorate 2017- 2018 Financial Information

The Research finance department has inserted your 2017-18 financial information.

Appendix 3 – Directorate’s 2017-2018 Annual plan (last year’s)

The CRIO has inserted your directorate’s 2017-2018 annual plan here, for easy reference.

Appendix 4 – Directorate’s 2018-2019 Annual plan

Please provide your 2018-2019 annual plan in the template provided in Appendix 4.

Your annual plan should breakdown the directorate’s key objectives outlined in your directorate’s Research Strategy, and allow you to show the detail behind the deliverables attributed to this year.

For example, if you state that your directorate’s strategic aim is to increase NIHR income over three years by £500K, your Annual Plan would set out how you would achieve this in each year. You could also provide further detail by specifying the number of applications you will make to a particular NIHR funding stream. We have provided an example in the first line of the table, to demonstrate this.