

**Staff Review and Development
Contract Research Staff
For the Reviewee**

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1. About Staff Review and Development

What is Staff Review & Development (SRD)?

SRD is an essential part of the University's commitment to developing staff and to delivering a high quality service, providing a way of balancing your needs and ambitions with the University's overall objectives.

The review process should enhance work effectiveness and facilitate career development by encouraging staff to discuss their achievements, address challenges, set targets and consider their training and personal development requirements. It should ensure that members of staff are clear about their responsibilities and have a formal regular opportunity to discuss any help they may need in meeting them. This process does not replace good management practice, nor is it used as a disciplinary tool or a means of determining pay.

In Chemistry, the Head of Department, reads and signs every completed SRD form for Research Staff. The details of the review discussion remain confidential between yourself, your reviewer, the Head of Department and the Welfare, Training and Development Advisor.

How is SRD carried out?

There are three key stages in the SRD process:

1. **Preparation** (relevant training, taking stock, looking ahead)
2. **Discussion** (through a formal, regular review meeting)
3. **Recording** (noting the agreed actions and objectives)

Who will carry out my SRD review and how often?

Normally your line manager/supervisor but may also be an appropriate senior member of staff. For queries/concerns regarding your reviewer, contact Kathleen Pickett or Marita Walsh.

Your first review should take place 12 months after your appointment and thereafter annually.

How can I find out more information?

The Departments' SRD scheme:

<http://www-ch-int.ch.private.cam.ac.uk/staff-resources/contract-research>

The University's Guidelines: <http://www.admin.cam.ac.uk/offices/hr/policy/appraisal/>

Who can I contact for advice?

Kathleen Pickett
Welfare, Training and Development Adviser
Tel: 36448
E-mail: kjp45@cam.ac.uk

Marita Walsh
Support Services Manager
Tel: 36453
E-mail: mjw91@cam.ac.uk

2. SRD in the Department

2a. SRD Process: 5 Easy Steps!

The following is a simple guide to SRD in the Department:

1. Reviewee and Line Manager receive reminder for SRD meeting

2. Reviewee/Reviewer agree suitable date, time and location for the SRD meeting

Tip: Allow at least one hour for the meeting and sufficient time for any SRD training you need to attend and the completion of the review meeting preparatory work.

3. Reviewee/Reviewer prepare for the SRD meeting

Tip: The following SRD meeting preparation is strongly recommended:

Reviewee

- Attends SRD training for Reviewees if required
- Reads Section Four of this booklet:
Information for the Reviewee
- Completes/returns the following forms to their Reviewer ahead of the meeting:
1. Self Review
2. Additional Agenda Items
- Brings all four SRD forms to the review meeting along with their generic role profile, CV and publications list.

Reviewer

- Attends SRD training for Reviewers if required
- Reads Section Four of this booklet:
Information for the Reviewer
- Confirms any further items for the meeting by returning the following form to their Reviewee ahead of their meeting:
2. Additional Agenda Items

4. SRD meeting takes place

Required: Reviewee/Reviewer complete and sign the following forms at the end of or shortly after the review meeting:

3. PD25: Staff Review and Development Record
4. PD26: Personal Development Plan

5. Shortly after the SRD meeting

Required: Reviewee/Reviewer send original completed and signed forms marked 'Confidential' to Kathleen Pickett to then seek review/signature from the Head of Department, monitor for training and HR purposes and retain in the Reviewee's personnel file.

Ideally this would include all four SRD forms but MUST include:

3. PD25: Staff Review and Development Record
4. PD26: Personal Development Plan

Tip: Reviewee/Reviewer should both keep a copy of these documents.

Next SRD meeting in 12 months time...

2b. SRD Resources

SRD training and booklets for Reviewees and Reviewers along with the following SRD forms form the basis of the Department's SRD process.

All are available on the Department intranet here:

<http://www-ch-int.ch.private.cam.ac.uk/staff-resources/contract-research>

SRD Forms	Completed by	When
1. Self Review Form (Optional)	Reviewee	Before the Review Meeting
2. Additional Agenda Items (Optional)	Reviewer	One week before the Review Meeting
		Two days before the Review Meeting
3. PD25: Staff Review and Development Record	Reviewer/ Reviewee	At/after the Review Meeting
4. PD26: Personal Development Plan	Reviewee	At/after the Review Meeting and throughout the review period.

3. Information for the Reviewee

3a. Preparing for your Review

i. **Reviewee Training**

To help you prepare for your review meeting, you are also strongly encouraged to attend the University's 'Staff Review and Development for Reviewees' training session if you haven't received similar training before.

You can find out more about review training here:

<http://www.training.cam.ac.uk/cppd/course/cppd-staffreview1>

ii. **Your Self Review**

You are also encouraged to make the most of your review meeting by completing the **Self Review Form** and considering your generic role profile and project plan if you have one. The Self Review form is intended to help you think about key areas to discuss in your review meeting.

Generic roles profiles for research positions can be found here:

<http://www.admin.cam.ac.uk/offices/hr/grading/pd33/>

iii. **Your Draft Agenda and the Additional Items Form**

Once you have completed your Self Review form, consider the draft agenda and confirm any additional agenda items to your Reviewer at least one week prior to your review meeting using the **Additional Agenda Items Form**.

The following is a typical review meeting agenda:

- General discussion and evaluation of achievements and progress made over the past 12 months
- Objectives for the next 12 months
- Training/Development required to help meet these objectives
- Views about your future development and career aspirations
- General discussion about what, if any, improvements can be made to improve current working methods.

Recommended:

Please send your completed Self Review form and any additional agenda items to your Reviewer at least one week in advance of your review meeting.

iv.

Your Personal Development Plan

The formal process for reflecting upon your own learning, performance and achievement and planning for your personal, education and career development is called Personal Development Planning (PDP).

Essentially this involves considering in what direction you wish your career to develop and identifying what skills and actions will be required in order for you to achieve what you want to. Clearly, your PDP has an important role to play in your review meeting and vice-versa. Your PDP should form part of your regular working practices so that you can be sure to keep your career and learning aspirations fresh, up to date and on track.

You are strongly encouraged to use the following form to do this and to reflect upon any previous PDP plans you made prior to your review meeting: **PD26 Personal Development Plan**.

You should ensure that you are actively monitoring and modifying your development plans to ensure that you stay on track.

The Department is keen to encourage you to access the support that is available to help you develop your PDP and achieve your career aspirations. This includes but is not limited to:

The University's Career Service for Research and Post-Doctoral Staff:

www.careers.cam.ac.uk/pdoc/

The Career Service provide a specialist service for contract research staff/postdocs, providing help both for those planning an academic research career and those planning a move away from academic research.

The service is free and completely confidential and includes online resources, workshops and events. You also have access to one-to-one careers consultations with your careers adviser, where you can discuss any aspect of your career.

Key contacts are Madelaine Chapman and Liz Simmonds.

To book an appointment, email pdocphys@careers.cam.ac.uk

For more information, visit their website above.

The University's full training provision:

<http://www.training.cam.ac.uk/cppd/>

This includes all providers of training within the University including, for example:

- Cambridge University Library
- CamSIS Training
- CamTools Training

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- Finance Training
 - Occupational Health and Safety Service
 - PPD Personal and Professional Development (see below)
 - PPD Research Development Programme (see below)
 - University Computing Service

The University's Personal and Professional Development (PPD) Service:

<http://www.admin.cam.ac.uk/offices/hr/ppd/>

In particular, PPD provide training and development to staff and research students across the University of Cambridge offering a vast and varied programme of courses.

This also includes the University's Researcher Development Programme:

<http://www.admin.cam.ac.uk/offices/hr/ppd/information/research/>

The 'Researcher Development' programmes, developed by PPD, include training in teaching, as well as managing research projects, writing and in developing personal strengths in communicating and working with others, amongst others. These programmes have been specifically designed with research staff in mind.

The Department's Mentoring Scheme:

<http://www-ch-int.ch.private.cam.ac.uk/staff-resources/contract-research>

<http://www.ch.cam.ac.uk/postdocs/mentoring>

The Department of Chemistry has launched a new Mentoring Scheme for Contract Research Staff (CRS). The scheme has been devised in collaboration with the Department's Post-Doc Affairs Committee (PDAC), is fully supported by the Head of Department and Athena SWAN working group and is open to all CRS.

Under the new scheme, a 'pool' of academic and senior staff mentors have volunteered to mentor CRS across a range of work-related topics and issues.

You can find out more about the scheme and view profiles of the volunteer mentors at the links above.

3b. During the Meeting

- Please bring the following to your review meeting:
 - Your most recent **1. Self Review form** and **2. Additional Agenda Items** form (incorporating any additional items from the Reviewer)
 - Your CV, publications list and role profile (optional)
 - The following forms which can be completed during/shortly after your review meeting:
 - 3. PD25: Staff Review and Development Record**
 - 4. PD26: Personal Development Plan**
- Ensure you have prepared thoroughly so that you are clear about and confident discussing the points you want to discuss as well as those already contained in the review meeting agenda including:
 - Your achievements and progress over the passed 12 months
 - Ideas for objectives for the next 12 months
 - Ideas for training/development requirements to help meet those objectives
 - Views about your future development and career aspirations
 - General discussion about what, if any, improvements can be made to improve current working methods.
- Seek clarification if you need to and ensure you raise and discuss everything you want to.

REMEMBER:

Review meetings should not contain any surprises because best practice and the most effective working relationships deal with queries, issues and concerns at the time they are occur.

A formal review meeting should not therefore be used to raise performance issues that you were not previously aware of and/or should have been dealt with at the time.

3c. After the Meeting

- The outcome of your review meeting should be recorded on the following SRD Forms:
 - 3. PD25 Staff Review and Development Record**
 - 4. PD26 Personal Development Plan**
- Write up your notes while they are fresh in your mind.
- The review forms must be signed by both the Reviewee and Reviewer, both of whom should retain copies. The original, together with the original Self Review form (optional), should be sent to Kathleen Pickett who will seek review and signature from the Head of Department. Please return your forms promptly so that you are not chased unnecessarily.
- Undertake any follow-up action agreed at the meeting.
- Follow up any personnel/non-academic related area, if needed, by contacting a member of the Personnel team; Kathleen Pickett (kjp45@cam.ac.uk), Marita Walsh (mjw91@cam.ac.uk),

Information provided by the Chartered Institute of Personnel and Development (June 2013) was used to prepare this section.