Making the most of Staff Review and Development (SRD) Department of Zoology

Jessie Monck, PPD, jcm56@cam.ac.uk
Overall purpose and outcomes of SRD

SRD is for all employees across all grades and staff groups. “Its purpose is to enhance work effectiveness and facilitate career development.” SRD Guidance

Diagram:
- Review work and progress
- Supported self-review
- Reviewee
- Clarify responsibilities
- Look for solutions
- Consider longer term plans
- Plan for future work and development
- Reviewer
Roles and responsibilities

Employees with responsibility for others…

• create an environment to help ensure individuals and the team can and do get the job done

All employees…

• take responsibility to meet standards and expectations of the job
SRD: Why do it?

Reviewer
- Agreed direction
- Promote independence
- Relationship
- Motivated staff
- Satisfaction

Team or Group
- Morale
- Performance
- Share skills
- Support

Department
- Results
- Reputation
- Succession
- Retention
- Culture
- Focus on future

Reviewee
- Self-review
- Clear direction
- Well-being
- Development
- Motivation
Stages in the SRD process

1. Prepare
2. Meet
3. Follow-up

Good practice includes a review of the review process
Stage 1: Preparation – before the meeting

1. Practical arrangements
   - Read relevant guidance, incl. PD25
   - Date, time, venue
   - Consider a pre-meeting

2. Key areas to consider:
   - Work and performance
   - Strengths and skills  
   - Areas to develop  
   - Wider plans for the team/organisation/department
   - Potential objectives for the next year
   - Longer term aspirations and career planning
   - Questions you will ask to support review and agreement

   } Behavioural attributes
Stage 2: Stages of the meeting

- Start the meeting
- Clarify purpose and agenda

Discuss

- Work, progress and achievements
- Areas of strength and enjoyment
- Areas and ideas for improvement
- Objectives: work and development
- Career planning and aspirations

- Agree actions
- Evaluate and close the meeting
The meeting – in film

Watch these and look out for what is done well and not so well (e.g. skills, knowledge, behaviour)

1. Start of the meeting 1
2. Start of the meeting 2
3. Middle of the meeting 1
4. Middle of the meeting 2
5. End of the meeting 1
6. End of the meeting 2
7. Trailer

See the others: Effective SRD online
Stage 2: Skills, knowledge, attributes for a constructive meeting

- Ask useful **questions** – and **listen** to answers
- Draw conclusions from discussions and use them to plan ahead
- Problem solve, be constructive with feedback, look for **solutions**
  e.g. how to make an improvement, or meet a development objective
- Make plans, **agree objectives**
- Knowledge – e.g. the direction of future work and opportunities
- Record key points, guide the meeting, keep to time and agenda
- Be open to suggestions and feedback

*Which of these do you do well? Which could you improve?*
Key skill: Setting objectives for SRD

- **Work**
  - To achieve in next 12 months
  - Linked to wider objectives

- **Development**
  - To help do the job better
  - To meet work objectives

Record on the SRD form (PD25) and Personal Development Plan (PD26)
“What if….” possible challenges or concerns
Tips for dealing with challenges and encouraging engagement

- Practise **assertive** behaviour
- Anticipate/pre-empt reactions
- Ask questions to understand the situation and clarify
- Ask “What do you (or I) hope to get out of this process?” or “how are you feeling about it?”. Be clear what you want to get out of it.
- Have evidence to support your opinion, be reasonable and objective
- Agree to find out more and discuss again
- Manage expectations, e.g. discuss priorities, agree reasonable time lines
- Be prepared – stay calm
Stage 3: follow-up after the discussion

• Both RECORD the discussion and objectives (use PD25 and PD26)
• Reviewees
  ➢ Take responsibility for achieving objectives
  ➢ Continue to review and communicate progress
• Reviewers
  ➢ Provide support to achieve objectives
  ➢ Continue to review and communicate
• Head of Dept
  ➢ Sign-off records, identify trends
  ➢ Continue to review and communicate
Overall purpose and outcomes of SRD

“*Its purpose is to enhance work effectiveness and facilitate career development.*”
PPD’s online learning resources

http://www.ppd.admin.cam.ac.uk/online-learning

- Effective SRD
- Giving Effective Feedback
- Managing Challenging Conversations
- Roles and Responsibilities
- Communicating Assertively
- And more