Department of Applied Mathematics and Theoretical PhySICS – STAFF REVIEW AND DEVELOPMENT (SRD)

# The Review Process: Guide for Reviewers

1. Your reviewees will be those staff that you line manage
2. In August or September a date needs to be scheduled with each staff member for their review meeting. This should be fixed at least a month in advance to allow preparation and you will need to set aside at least 1 hour for the meeting in a location free from disturbance.
3. Staff members should use form PD25 and PD26 which can be found on the University’s website (<http://www.hr.admin.cam.ac.uk/forms>). The Department will also use the SMART objectives template in place of question 2 on the PD25 form.
4. In order for the staff member to prepare for this meeting, please remind them that they should look at the agenda on the SRD form and consider the questions raised there in readiness for the review discussion. Where staff support a group of academics or other internal customers, they should be encouraged to solicit feedback through conversation to prepare for their review meeting. If requested, you should provide a copy of the job description to the member of staff concerned. Some of you will have several people to review, so plan ahead and avoid cramming them all into a short period of time.
5. If you have a staff member who has a shared line management consider whether the review should take place with both line managers or if one person should take the lead on this.
6. Do come to the Review Meeting prepared. Role/Job Descriptions for academic related and assistant staff are available from the Departmental Administrator and you should read those of your staff before the review meeting. The questions identified on the SRD form will form the baseline for the discussion so it is important that you have read it thoroughly and noted any key points that you would like to bring up. For both parties to the review, the meeting should be a positive experience. Nothing discussed in this meeting should come as a surprise to your staff member as regular meetings should have been taking place throughout the year to address any issues or concerns.
7. The Review Form should form the basis for recording the outcome of the discussion. Key points are the review of past objectives and setting those for the coming year. If in response to last year’s objectives, additional actions are required from the staff member, line manager or the other members of the Department, they should also be recorded. If possible, complete and sign the Review Form at the conclusion of the discussion. If this is not possible due to revisions needing to be made, this should be agreed and signed within 4 weeks of the review taking place.
8. Once both parties have signed the form it is passed to the Head of Department or his nominated deputy for countersigning. They will look at all of the Review Forms for consistency and to see if there are general improvements that can be made. The finalised form is then uploaded to the he online SRD system. If specific training had been agreed upon, the reviewee should look at dates and options utilising their Line manager and PPD.

Department of Applied Mathematics and Theoretical PhySICS – Staff REview and DEvelopment (SRD)

# The Review Process: Guide for Reviewees

1. Every member of staff will be reviewed annually by their line manager. For those staff who have joint line management you will either have a review with both line managers or one of your line managers will take the lead on this, whatever is deemed most appropriate.
2. The purpose is to have an open, constructive, two-way discussion about how you find your role, what might be done to make it more effective and satisfying, whether there are any training needs and so on. Part on the review will be a discussion around setting objectives for the following year.
3. Staff members should use form PD25 and PD26 which can be found on the University’s website (<http://www.hr.admin.cam.ac.uk/forms>). The Department will also use the SMART objectives template in place of question 2 on the PD25 form.
4. Your reviewer(s) will contact you to arrange a convenient time for the review during August/September to be fixed at least a month in advance.
5. In preparation for your review, please spend some time considering the questions outlined on the SRD form. Where your role supports a group of academics or internal customers you may want to plan to approach some of those you support for a feedback discussion in order to bring these comments and development ideas to the review meeting.

1. At the appointed time, you and your reviewer(s) will meet to discuss your progress over the review period. The meeting is confidential and you should set aside at least 1 hour for the discussion. Nothing discussed in this meeting should come as a surprise to you as regular meetings should have been taking place throughout the year to address any issues or concerns.
2. At the meeting the reviewer will record the main points of the discussion on the Review Form including any career development and training needs that were identified. Objectives for the future will be agreed and prioritised.\* The reviewer(s) will sign the form and pass it to you for signature, ideally in the meeting or shortly after.

1. Once both parties have signed the form it is passed to the Head of Department or his nominated deputy for countersigning. They will look at all of the Review Forms for consistency and to see if there are general improvements that can be made.
2. Training is available to all staff who require it, for both being the reviewer and/or the reviewee. See the University Personal and Professional Development web pages for more information.

\* *Objectives may change over the review period and if this occurs staff and their line managers are encouraged to meet informally to discuss. It is expected that regular meetings take place throughout the year to discuss work and progress.*

[**A Guide to Setting SMART Appraisal Objectives**](http://www.mycvandme.co.uk/blog/a-guide-to-setting-smart-appraisal-objectives.html)

Setting SMART objectives at your annual review helps you to understand where your role fits into the Institute, and what your responsibilities are and helps your manager identify your development needs and monitor and support performance

**In more detail, SMART objectives should be:**

**SPECIFIC**

A specific objective is much more likely to be achieved, as it is clear, concrete, detailed, focused and well defined. The objective must be straight forwards and emphasize action and the required outcome. Ask:

* WHAT am I going to do? Use strong, action verbs such as conduct, develop, build, plan, execute, etc. This helps your objective to be action-orientated and focuses on what’s most important.
* WHY is this important for me to do?
* WHO is going to do what? Who else need to be involved?
* WHEN do I want this to be completed?
* HOW am I going to do this?

**MEASURABLE**

Results need to be measurable so that, at the end you can decide whether the desired results have been achieved. Measures should be described in terms of quantity (how many, how much, % increase), quality (measure of satisfaction), cost (% reduction in cost/expenses) and timeliness (completion of a project).

**ACHIEVABLE**

Objectives need to be achievable, if the objective is too far in the future, you’ll find it difficult to keep motivated and to strive to attain it. Objectives, unlike your aspirations and visions, need to be achievable to keep you motivated. Objectives need to stretch you, but not so far that you become frustrated and lose motivation. To help set achievable objectives it helps to ask:

* Can you get it done in the proposed timeframe?
* Do I understand the limitations and constraints?
* Can you do this with the resources we have?
* Has anyone else done this successfully?

**REALISTIC**

Objectives that are achievable may not be realistic. Realistic means that you have the resources to get it done. The achievement of an objective requires resources, such as, skills, money and equipment. Whilst keeping objectives realistic, ensure that they stretch you. Most objectives are achievable but, may require a change in your priorities to make them happen. To help set realistic objectives it helps to ask:

* Do you have the resources available to achieve this objective?
* Do I need to revisit priorities in my life to make this happen?
* Is it possible to achieve this objective?

**TIME FRAMED**

You should always set a realistic target date for the completion of your objective. Timeframes promote action e.g. increasing sales by September 2012 leaves no doubt as to what you need to achieve and when. To help set timely objectives it helps to ask:

* When will this objective be accomplished?
* Is there a stated deadline?