

**STAFF REVIEW AND DEVELOPMENT SCHEME (SRDS)**

**Name**

**Position**

**School/service**

**Reviewer**

**Does reviewee have staff leadership or management responsibilities?**

**Date of SRDS meeting**

**Date of last SRDS meeting**

**Grade**

**Date of appointment to current role**

This form is intended as a guide and general structure for the SRDS discussion, which will normally be held every 12 months.

The key objectives of SRDS are:

* to have a constructive two way discussion of activities and achievement; and
* to agree realistic, achievable and prioritised objectives and a personal development plan for the forthcoming year, which take account of School/Service objectives, overall workload, and career aspirations.

Sections 1 & 2 should be completed by the reviewee and passed to the reviewer at least a week before the date of the meeting. This is to allow the reviewer time to reflect and prepare and to ensure an effective and useful discussion.

Section 3 is a check list for reviewers to ensure that key issues have been discussed.

Section 4 provides for a summary of the meeting as well as a list of agreed objectives. This will normally be completed by the reviewer within two to four weeks after the meeting has taken place.

Section 5 provides the opportunity for the reviewee to add any comments as appropriate and sign to agree it as an accurate record of the meeting.

Section 6 is completed by the Head of School/Service noting actions required.

Section 7 is a non-confidential tear-off sheet listing identified training and development.

**Section 1 – Taking Stock**

This section is for the reviewee to complete, looking back over the last 12 months and constructively evaluating and reflecting on progress made. It could include:

* Any general issues relating to the job, including balance of workload.
* Main achievements since last SRDS meeting – what has gone well, what objectives have been met, what difficulties have occurred, have development plans been implemented?
* Feedback from peers, managers, your staff, customers where appropriate
* Perception of your strengths and proposed areas for development

**Section 2 – Looking forward**

This section is also for the reviewee to suggest objectives for the next 12 months, derived taking account of overall workload, School/Service objectives and career aspirations, and issues that might affect this achievement. Please therefore consider:

* Faculty/School/Service strategies and plans
* What challenges will there be in the role and what changes in work priorities, allocation etc. might be needed
* What support will be required from others
* Personal development needs

**Section 3 - Checklist for reviewer to complete at the meeting. Tick if discussed.**

* Job Description, including progress & development of individual within grade
* Future career development, including promotion prospects and advice (essential discussion if within 2 points of top of grade)
* Leadership and Management Standard for those with staff L&M responsibilities
* ‘The Partnership’ for those involved with Student Education
* The individual understands how their personal work objectives will help towards the achievement of the School/Service plan
* Health and Safety requirements of role
* Workplace adjustments: All staff should be regularly asked if they have everything they need and if everything is working effectively. It is important that managers arrange a **separate meeting** to discuss and agree workplace adjustments, independent from any appraisal meetings. Queries about workplace adjustments can be directed to HR.
* Evaluation of any Training & Development undertaken in last 12 months
* Future Training and Development recommended

**Section 4 – Outcomes and Objectives**

This section is for the reviewer to complete and consists of 2 elements.

**4.1** **A general summary of discussion** (informed by Sections 1 and 2 above)

**4.2. Agreed realistic, achievable and prioritised objectives** derived taking account of a) School/Service objectives, b) overall workload, c) career aspirations. Objectives should include proposed interim review dates, timescales for achievement and desired outcomes.

**Section 5 – Reviewer/Reviewee ‘Sign Off’**

Comments from reviewee on accuracy of Sections 4 and 7

Signature of reviewee Date

Signature of reviewer Date

**Section 6 – For School Use Only – Head of School/Service ‘Sign Off’**

**Action Required by Head of School/Service**

**Heads are reminded** that they will need to inform the reviewer about any actions/decisions taken, so that the reviewer can keep the reviewee informed.

**Signature of Head of School/Service** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Heads are reminded** about the need to ensure that the “review completed” date is logged in SAP

**Section 7**

The reviewer and reviewee are asked to note that any information on this tear-off page will be deemed **non-confidential**. This is to allow training & development to be logged and progressed by people other than the head of school/service.

**Name** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**School/Service**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Personal Training and Development Plan**: this relates to both personal and job related training and development.

| **Training/Development Identified** | **How to be met and resource implications if known** | **Priority/**  **timescale** | **Progress review dates with reviewer** |
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*Continue if required*