

DEPARTMENT OF X
Staff Review and Development (SRD) of Assistant Staff

The Review Process: Guide for Reviewers

- 1) The Departmental Secretary will inform you of your reviewees.
- 2) As soon as possible, contact your reviewees to make an appointment for the Review Meeting. You will need to set aside at least 1 hour for the meeting in a location free from disturbance. Remind the reviewee that they must complete the Self-Appraisal form and pass this on to you at least 1 week before the review. If requested, you should provide a copy of the job description to the member of staff concerned. If there are additional points that you would like to discuss at the meeting, add these to the form, return it to the reviewee 2 days before the meeting, keeping a copy for yourself. Some of you will have several people to review, so plan ahead and avoid cramming them all into a short period of time.
- 3) Come to the Review Meeting prepared. Role/Job Descriptions for assistant staff are available from the administration office and you should collect those of your reviewees and read before the review meeting (please return to the office). The Self-Appraisal form is 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. Issues such as pay or upgrades should **not** be the focus of the discussion; the emphasis is on **Development and Performance**. The reviewee should be comfortable but it is important that the discussion remains focussed. For both the reviewer and reviewee, the meeting should be a positive and rewarding experience.
- 4) 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 reviewee, the reviewer 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.
- 5) A copy of the Review Form should be passed to the reviewee and one retained for yourself. The original, together with the original Self-Appraisal Form should be handed to the Administration Office. You should also inform the Office that the review has been completed and ask them to note the date of any follow-up meeting. If specific training had been agreed upon, the reviewee should be put in touch with the Department Training Co-ordinator to discuss their requirements.
- 6) Once all of the reviews have been completed, the Head of Department and Department Secretary will look at all of the Review Forms. You will then be asked to attend a meeting along with the other reviewers to discuss the review process. For this meeting you should consider generic issues that may have arisen from your reviews, although you should not, of course, refer to specific individuals.

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The Review Process: Guide for Reviewees

- 1) You will be informed of your reviewer. If you are unhappy with the person suggested, please raise the matter with the Departmental Secretary.
- 2) Your reviewer will contact you to arrange a convenient time for the review.
- 3) Please complete the enclosed Self-Appraisal Form and pass it to your reviewer at least 1 week prior to the review. Your reviewer will return the form to you two days ahead of the review meeting with additional items that s/he would like to discuss. Bring this revised version along to the meeting.
- 4) At the appointed time, you and your reviewer 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. Remember that this discussion is the key point in the review process.
- 5) 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.* If a follow-up meeting was agreed, the date will be recorded here. If specific training had been agreed upon, the reviewee will be put in touch with the Department Training Co-ordinator to discuss their requirements. The reviewer will sign the form and pass it to the reviewee for signature. The reviewer and reviewee will keep copies of the form and the original kept in the administration office under lock and key, together with the original Self-Appraisal Form. Forms will be kept for 3 years. If the reviewer leaves their post during this time, the records will be passed to their successor.
- 6) The Head of Department and Departmental Secretary will look at all of the Review Forms and will also meet with the reviewers to discuss how effective the SRD process was, and ways that it can be improved. Broad issues may have emerged from the SRD process and the Head of Department may choose to provide feedback to staff on these issues, and what steps are being taken to address them.

** Objectives may change over the review period and if this occurs reviewees and reviewers are encouraged to meet informally to discuss. Informal discussions in the review period are also a chance for the reviewer and reviewee to touch base and if necessary take any actions to help the reviewee meet his/her objectives.*

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Name:	Job Title:
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Taking Stock

Please give a brief description of your current role and responsibilities, and approximately the percentage of time spent on each (list no more than 5):

Looking back to the objectives agreed at your last review meeting, which ones have been (a) exceeded (b) met (c) not achieved? What evidence are you basing these assessments on?

Not relevant this time

What do you feel you have done particularly well in your role over the past 12 months?

What do you feel you have done least well in your role over the past 12 months?

To help improve performance in your job still further, what steps could be taken by (a) you, (b) your line manager, (c) the Department?

Please record any training courses that you have attended since the last review:

SELF-APPRAISAL FORM

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Planning Ahead

What do you think should be the key objectives for your job for the next review period (list no more than 5)?

The Review Meeting

Please list any additional items that you would like to discuss at the review meeting. These could include training needs, career development or any changes in your responsibilities that you would like to see in the near future.

Step 1 – Reviewee: Once you have completed the form, please pass it to your reviewer at least 7 days before your review meeting

For the Reviewer:

Please list any additional points that you would like to discuss at the Review Meeting

Step 2 - Reviewer: Please copy the form and return the original to the reviewee at least 2 days before the meeting

Step 3 – Reviewee: Please take note of the additional points noted by the reviewer. Remember to bring this form along to the meeting.

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<u>Name:</u>	Job Title:
<u>Date of appointment to post:</u>	Date of joining:

Review of Past Objectives

<i>Objectives</i>	<i>Extent Achieved</i>	<i>Measures/Evidence</i>
Not relevant this time		

Further action to be taken by:

- (a) The Reviewee
- (b) The Reviewer
- (c) Others in the Department

Objectives for the Coming Year (maximum of 5)

<i>Objective</i>	<i>Priority</i>	<i>Form of Measurement</i>

List here any training and development needs that were identified at the meeting:

Signed as an agreed record:

Reviewee:

Reviewer:

Date:

Give the date of a follow-up meeting if arranged:

REVIEW FORM

