Getting the Most
From Your Development
Review Meeting

Guidance Booklet (Reviewees)
INTRODUCTION

Note: This booklet is designed to be read in conjunction with the Code of Practice for the Management of Research Staff.

What Is A Development Review Meeting?

The Code of Practice for the Management of Research Staff states researchers must have an opportunity, at least annually, to consider their longer term career development. The role of this meeting is to enable you to pause and consider your future, including the specific skills you may wish to acquire for your future career. It is essentially an opportunity to discuss your wider career and personal development beyond the current project or work area. It is not a formal job performance appraisal meeting; it is more a chance to step back, and reflect on what you have been doing, what your needs are, and where you are going.

The meeting will be between you and your manager (likely your PI/research team leader) though the Code states you should have the opportunity to ask for another mutually agreeable academic mentor for this meeting if you feel this would be useful. Likely it would last between one and two hours, though you and your reviewer should discuss at the start of the meeting how much time has been set aside.

A Self Review Form should be sent to you by your reviewer at least 14 days in advance of the meeting. Completing this form will help you reflect on your progress and plans, and help guide the discussion. After the meeting, a Note of Action form will be completed, and signed. Both these forms are available to download from the online Code of Practice.

Why Should I Have This Meeting?

It’s all too easy for longer term plans and concerns to get buried under our day to day work and tasks. Taking some time out to talk with someone about goals beyond the immediate work area, and to write down some thoughts on progress, possible future plans, and the types of activities/support needed to get there, is therefore valuable.

What Might I Get Out Of The Meeting?

Hopefully you will find having this type of meeting useful. What you get out of it will probably depend to some extent on how much you put into it i.e. in actively preparing, thinking, talking/questioning openly, and following up after.

Benefits to you could include:

- Crystallising ideas, options, needs and concerns around your career development in your mind, by having a more formal structured space to talk, reflect and write about them.
- Getting an honest independent opinion on your current progress and viability of future plans.
- Having access to support, ideas and suggestions from another person, who may have considered aspects that you haven’t.
- Greater awareness of options/constraints/deadlines at an earlier point in time e.g. thinking well ahead of time in terms of fellowship/grant deadlines, or other eligibility criteria (e.g. applications within x years of PhD award). Time passes quickly and such deadlines can be easy to miss.
- An increased sense of commitment/enthusiasm for tackling a new idea or activity.
- A formal opportunity to raise concerns or discuss barriers to career progress (rather than leaving them to drift or get worse).
- Feeling more supported and respected.
**Will The Reviewer Be Able To Answer All Of My Questions?**

Probably not! And it would be unwise to expect them to be able to do so. Though your reviewer will be a more experienced academic researcher, they may have not followed the exactly same kind of career path as you, and/or may not have experience in some the areas you may wish to explore in future, whether it be a change of research focus, a move into a commercial setting, a move to a higher education/research setting in a different country, etc.

However, your reviewer will be able to act as a sounding board for ideas, and may be able to do many things to support you such as:

- Sign post you to other support services in the University, or other colleagues with a specific area of expertise;
- Listen to your ideas and encourage you to explore them further and get back to them with your progress;
- Suggest external contacts, professional bodies, etc, that may be able to offer you relevant advice or support;
- Share some of their own experience which may have some relevance e.g. in drafting/submitting grant and fellowship applications, activities/support they have done or received during their career that helped them, etc

You should not expect that the meeting is an opportunity for someone else to tell you exactly what you need to/should be doing, either now or in the future.

**PREPARING FOR THE MEETING**

There are many things to consider when preparing for this type of meeting, including:

**Go With A Positive / Open Attitude**

It can be too easy to write off any type of review meeting as just ‘lip service’ or some sort of management-imposed activity. If your attitude is that it is just a ‘tick box’/form filling exercise and no more, then it will probably end up being no more than that.

Aim to view this meeting as an opportunity to have an open, useful discussion with another interested, experienced individual who will likely have come across similar types of anxiety or decisions that you may face in your own career. It’s not just filling in a few forms to put forgotten in a drawer until next year, but a chance to hopefully consider options, make plans, review aims, and take action.

**Consider Achievements So Far**

What you’ve particularly enjoyed in this, and previous, roles, tells you a lot about potential areas you might be interested in developing. This is true of both areas of research, and of skills/tasks you particularly excel at. You might also consider completing a personal SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis (see example at end of this booklet). Noting down your thoughts around these headings might get you thinking of the sort of points to raise on your Review Form.

**Think Openly About Likely Future Aims**

The Self Review Form asks a number of questions about short term and longer term career goals. Don’t be worried about there being a ‘right’ or ‘wrong’ way of tackling these sorts of questions.

Common worries could be a fear of stating quite high or ambitious aim(s), for fear of, for example, not succeeding, or being seen as being unrealistic. Remember though not to under-sell yourself and your potential capabilities, or be frightened of aiming high. If your goal is to move into a senior leadership role within academia, you will likely need the support and advice of those who have followed this path as early on as possible, and raising it in your development meetings is a good start.
Equally, another common worry could be fear of stating possible career goals that may not be in line with what you feel is 'expected' from an academic researcher of your current standing. For example, many researchers do not aim for a PI/research leader role, or an academic lecturing role, but have other types of future roles in mind - lab management, research support/administration, policy adviser/researcher in a government/charity context, industry-based scientist, management/project management roles in a non-HE setting, running your own business and/or consulting. The list could be endless.

You should not be frightened of discussing your options and ideas openly. Your reviewer will know the difficulties and realities of being in a senior academic role and will know that not everyone aspires to these roles, and how difficult they can be to obtain. Your reviewer should be sympathetic to you wishing to discuss and explore different avenues, even if they are outside their specific areas of expertise.

You may have more than one or two ideas of different avenues you think your career could go down, and you should not be worried about noting and discussing this. Very few people have one grand 'masterplan'. Many of us have a variety of ideas, and are open to a range of opportunities that may present themselves over time. It is very helpful to have considered a range of options and to consider building some flexibility into your plans.

**Support / Advice You Might Need To Support Your Future Aims**

On your review form you are also asked to think about potential obstacles to your career goals, and how you might address them. Discussing issues you may need to overcome – such as a need to learn a specific new skill, or increasing your personal networks, or learning more about a new employment sector/industry - is important, and particularly you may want to think in advance of any particular questions you want to ask your reviewer about these issues.

You may consider asking your reviewer for their views on an idea, for specific advice (if possible, based on their background/experience), if they have any ideas for other contacts/leads, etc.

If your reviewer is your manager, or has a role in directing your work, you may want to raise with them how your work could be adjusted, if possible, to take into account new experiences or skills you wish to develop to help you in realising future career aims.

For example, you may wish to learn a specific new skill, or take on more management/supervisory responsibility, or be more involved in grant writing, etc. Or you may wish to take a specific qualification or other training, and want to ask if there are any sources of potential funding, or other support. If this is the case you may like to check out in advance the type of training and development opportunities provided by various departments of the University, and/or other external options (e.g. some funders/professional bodies offer courses and other development opportunities) and bring with your ideas with you.

**DURING THE MEETING**

Here are some points to help you focus on, and get the best out of, the meeting itself:

- Remember this is your meeting around your agenda. Don’t sit in silence, or expect to be ‘told’ what to do/think/write.
- Aim to stay positive, and again, remember not to under-sell your achievements, progress or ambitions.
- Work through your self review form in a timely fashion - don’t spend fifty minutes on one question and then rush through the rest in ten minutes!
- Expand on written points with examples if needed, and questions where wanted, etc. Likely more of the meeting will be taken up by you talking, rather than your reviewer.
• Be open to ideas and suggestions your reviewer has to make. They may have recommendations on developing skills in your present role; they may draw attention to aspects you have overlooked on your Self Review form. Take any suggestions/feedback in the spirit they are given i.e. to try and help you.

• Remember your reviewer may not be able to answer every question; you may need to make a note to seek advice from a different source after the meeting, or your reviewer may note that they will check for an answer and get back to you.

FOLLOW UP FROM THE MEETING

Note Of Action Form

After the meeting you will agree a Note of Action form with your reviewer, which will contain a summary of action points you have agreed. It’s always easy to let paperwork slide and get buried after meetings, so do take the time to make sure this gets completed and agreed after the meeting. It’s the commitment to follow up that is probably the most important part of the review process, so to miss this bit out defeats the whole point!

There is no absolute right or wrong way to complete the Note of Action form. The types of activities/tasks you might decide to undertake, or to explore further, will vary from person to person, depending on what career options/ideas you have discussed in your meeting.

Examples of ideas/activities that could be considered to help support career development, that may be noted for follow up after a review meeting could include:

• Doing some research relevant to your particular aims e.g. talking to another colleague, reading/online investigation, contacting a professional body or other agency, etc.

• Contacting a support service within the University - Edinburgh Research and Innovation, HR, etc - for advice and/or support.

• Investigating training or other development options.

• Joining a mentoring programme e.g. the University Research Staff Mentoring Programme, or a mentoring programme through a professional body or network.

• Agreeing to take on a new task/area of responsibility to further develop skills/experience and agreeing to meet in 3/6 months to discuss progress.

• Increasing networks/contacts in a specific research area.

• Aiming to present at a major conference or similar arena, to increase your academic profile.

• Reflecting on, and developing, your writing practices (e.g. through writing/editing more regularly, setting up or joining a writing group, etc).

• Aiming to publish research output within a specific timescale.

• Developing skills in teaching and/or student supervision.

• Organising or contributing to an in-house seminar.

• Developing greater understanding of, and experience in, University/HE administrative procedures through joining a relevant committee, forum, working group, etc.

• Researching funding options, and/or drafting a fellowship, or other type of funding, application, and seeking feedback.

These are just a few short ideas; you may have many others. If your reviewer is not your line manager, remember that development options to be completed during work time, or that would require some adjustment to how your work is organised, should normally be discussed and agreed between you and your manager.
Reviewing your completed Note of Action Form through the year can help you remember your plans, encourage you to continue to work towards them, and help monitor your progress. Making a diary note to check back on it at regular intervals (e.g. every 3 months) is a good idea!

Remember to keep a note of and log such activity, training, and new work areas/skills throughout the year. Keeping records is extremely valuable to aid illustrating the full range of your skills/experience in future.

**What If I Don’t Have A Clear Future Career Plan / Goal(s) To Discuss?**

As said previously, very few people have one grand career ‘masterplan’. And even those people who do may find that they veer off-course at times, perhaps due to circumstances beyond their control, or because their priorities/ideas change over time.

If you struggle to think of any longer term career goals, or are quite undecided of what route(s) you might like to consider, then raise this in the meeting. You might have specific questions about, for example, staying in academia and what this could realistically entail.

You could therefore prepare questions in advance of to the meeting which will open a general discussion with your reviewer. Or during the meeting you might be able to discuss aspects of your current/previous roles you particularly enjoy, or other areas you are particularly enthusiastic about, and then note on your follow-up form that you will do some research about possible career options that could fit around these. Any sort of conversation you have with your reviewer will probably be more useful than doing nothing. Just the act of talking about it might get you thinking a bit more clearly about things you do and don’t want.

You may struggle to see the point in this sort of meeting in the first place, for example, because you perceive that your career decisions are out of your own hands (“Well, it all totally depends on that grant application being successful/whether x moves on” etc). Do try to remember that even if we don’t know exactly what opportunities or constraints will come our way, the least we can do is to try to ensure that we are best placed to face them.

Having thought about some contingency options is useful. Planning, considering the pros and cons of various options, building up useful experiences, and meeting a range of people, can all help us be better prepared. Solely waiting to see how external factors/people treat us and work out during our career is not only stressful, and makes us feel less in control, it can also be dangerous in the long run.
APPENDIX 1 - SWOT ANALYSIS

As discussed previously, you may consider a SWOT analysis useful preparation prior to completing your Review Form. A blank template follows on the next page which you may like to complete.

In the Strengths and Weaknesses sections you will likely be focusing on and recording internal issues and qualities such as your skills, knowledge, and experience. In the Opportunities and Threats sections you will likely be focusing on and recording external issues, such as the job market, your geographical mobility/constraints, etc.

This sort of analysis can help get you thinking about what areas you would like to build on further and develop, and what obstacles you may need to overcome or address, in planning your future career.

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APPENDIX 2 - FURTHER RESOURCES TO SUPPORT YOU

A researcher in the University suggested the following outline as a way for fellow researchers to think about accessing career-related training and development. You may find it a useful example list of ideas to think about.

University (Researcher Development Programme) e.g.
- Managing your Future for Researchers
- Introduction to Management
- People Management
- Making Funding Applications

University (Other Providers)
- Information Services e.g. Powerpoint, photoshop, web development, etc
- Health and safety
- Job-specific courses e.g. Statistics, Good Laboratory Practice, etc.

External Courses
Royal Society, Wellcome Trust, Cold Spring Harbour, Funder-specific training courses, etc. Sometimes these have to be applied for competitively (good for the CV!)

Seminars
- University (within and out with department - keep an eye out for opportunities.)
- External (e.g. Royal Society; Edinburgh Lectures)

Conferences
Subject-specific, General, Industry-related, and Careers-related (e.g. in Biosciences, Source) Costs may be covered by grants. Bursaries are often available from the conference organising body - don’t be frightened of asking!

Other Opportunities
University Research Staff Societies: Can be good for networking, meeting “useful” people, accessing alternative talks etc. If there isn’t an appropriate one available, then set one up!

Other activities: Public engagement/communication e.g. Researchers in Residence, Science Festival, Book Festival, outreach activities etc

Questions to ask yourself:
- Is it relevant? - Now / later
- Will it develop a specific skill I can use in my job?
- Does it develop a transferable skill to help my career?
- Does it look good on my CV?
- Will it be interesting?