

SRS TOOLKIT MENTORS.

Institution of
**MECHANICAL
ENGINEERS**

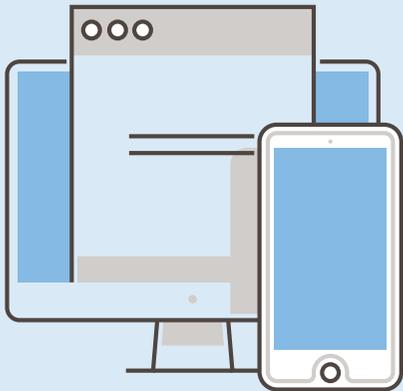
Improving the world through engineering

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Contents and Introduction

► Contents and Introduction

- Getting started with the MPDS/SRS tools
- Using the MPDS/SRS tools
- Compulsory Submissions
- Optional Submissions
- Completing MPDS/SRS



About the Supported Registration Scheme (SRS)

SRS is a scheme for graduate engineers seeking professional registration as Chartered or Incorporated Engineers. As a mentor, you are making a commitment to help develop engineers from their first placement to their professional registration, through a disciplined sequence of quarterly reports and annual assessments that must meet the competences set out by the Engineering Council's UK Standard For Professional Engineering Competence (UK-SPEC).

About Career Developer

Career Developer is the Institution of Mechanical Engineers' (IMechE) online portal that allows engineers to manage their professional development. Under the SR Scheme, the Developing Engineer will submit Quarterly Reports and Annual Assessments which meet planned objectives to be scored against the UK-SPEC.

Your role

As a Mentor, you represent the IMechE, as well as your company. Using UK-SPEC, you'll aid the development of competent engineers and ensure best practice engineering for the future.

As a mentor, you must:

1. Register as a Mentor with us.
2. Familiarise yourself with the SR Scheme and its reporting requirements, as well as the UK-SPEC competence framework.
3. Ensure your Developing Engineer is registered on the Scheme, and that you both have access to the MPDS/SRS tools.
4. Maintain regular meetings with your Developing Engineer to discuss and agree development plans, and to explore opportunities to bridge skills and knowledge gaps

Getting Started with the MPDS/SRS tools

Contents and Introduction

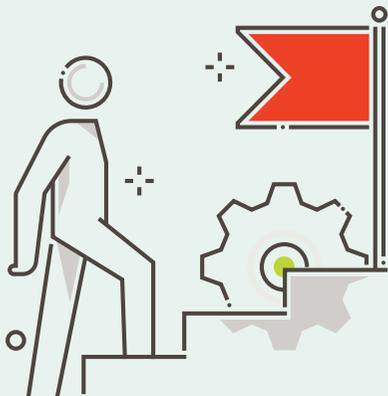
➤ **Getting started with the MPDS/SRS tools**

Using the MPDS/SRS tools

Compulsory Submissions

Optional Submissions

Completing MPDS/SRS



Registration

Developing Engineers must complete an IMechE SRS registration form to be formally registered on the Scheme.

Once registered, Developing Engineers must maintain continuous membership of IMechE or another Professional Engineering Institution (PEI). If you are no longer able to mentor your engineer please discuss this with the Scheme Administrator and they should inform the IMechE of any changes. If your Developing Engineer transfers to a new company with an accredited MPD Scheme in place, please advise them to complete the MPDS Transfer form. If the company does not have an accredited scheme in place, please email us.

Previous Experience

Unlike MPDS, there is no mechanism for claiming Previous Experience on SRS.

Developing Engineers must complete an IMechE SRS registration form to be formally registered on the Scheme.

Overview

The MPDS tools have many features that allow Developing Engineers to record their Initial Professional Development (IPD) as effectively as possible. The tool can be used to simply submit the compulsory MPDS Quarterly Reports and Annual Assessments, or as a more fulfilling development programme with the capability to plan, record and provide evidence against competences. The documents regularly submitted for your approval form part of the application for professional registration and should be supported by regular meetings with your Developing Engineer.

As mentor, you are expected to review each submission within two months. Your feedback to your Developing Engineer is valuable in helping them to work towards professional registration.

The Developing Engineer is scored against five main areas of competence. The compulsory Quarterly Reports and Annual Assessments must be planned effectively in order to meet the requirements set out by the Engineering Council. UK-SPEC can be used to determine the progression and competence of the engineer in a non-prescribed way.

Getting Started with the MPDS/SRS tools

Contents and Introduction

➤ **Getting started with the MPDS/SRS tools**

Using the MPDS/SRS tools

Compulsory Submissions

Optional Submissions

Completing MPDS/SRS



Scoring for UK Standard for Professional Engineering Competence (UK-SPEC)

There are four levels of scoring that your mentor may use to assess you as a Chartered or Incorporated Engineer:

Level 1 Aware	Level 2 Familiar
<ul style="list-style-type: none">➤ Performs the activity with significant supervision and guidance➤ Performs basic routine and predictable tasks➤ Little or no individual responsibility	<ul style="list-style-type: none">➤ Performs the activity in a range of contexts➤ Supervision only required in more complex circumstances➤ Some individual responsibility or autonomy
Level 3 Skilled	Level 4 Expert
<ul style="list-style-type: none">➤ Performs the activity in some complex and nonroutine contexts➤ Significant responsibility and autonomy➤ Can oversee the work of others	<ul style="list-style-type: none">➤ Performs the activity in a wide range of complex and non-routine contexts➤ Substantial personal autonomy➤ Can develop others in the activity

How the scores work

Each compulsory Annual Assessment that your Developing Engineer submits must be graded using the above levels, based on the UK-SPEC's five competences.

Many mentors use 'overall competence as a professional engineer' as their guideline for scoring competence during the Scheme, showing the Developing Engineer's progression in development. You will need to review the final scores you award your Developing Engineer once they have completed SRS to decide whether registration is appropriate. Your Developing Engineer should be achieving three level 3s and two level 2s before applying for professional registration.

Using the MPDS/SRS tools

Contents and Introduction

Getting started with the MPDS/SRS tools

➤ **Using the MPDS/SRS tools**

Compulsory Submissions

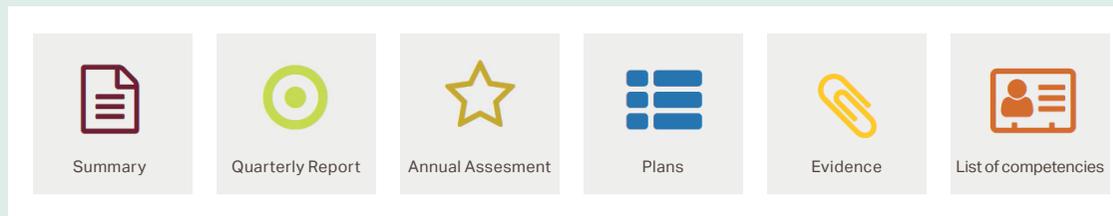
Optional Submissions

Completing MPDS/SRS

Using the MPDS/SRS tools is simple

Log in to your account at www.imeche.org/careerdeveloper or enter your IMechE username and password in the log in field in the top right hand corner of any page of the IMechE website, navigate to the Welcome page and then click MPDS/SRS Tools for Mentors. If you have any trouble logging in to the tools, email SRS@imeche.org

Once logged in, you will need to complete your training details to ensure your profile supports the company scheme accreditation requirements. You should include the date and type of any UK-SPEC and MPDS mentoring training that you've undertaken.



These areas allow you to review and respond to your Developing Engineer's submissions. The summary page will show if you have any outstanding submissions awaiting review within each area. Simply click on the relevant link to be taken to the review tool.

You will also see a list of Developing Engineers assigned to you and the levels they are working towards.

If your Developing Engineer is not showing, email SRS@imeche.org and let us know so we can connect you. It is highly important that your Developing Engineer develops a good reporting style through regular submissions. By building a record of competence, they are demonstrating their skills and knowledge base, which will be used as part of the application for professional registration.

Compulsory Submissions

Contents and Introduction

Getting started
with the MPDS/SRS tools

Using the MPDS/SRS tools

➤ **Compulsory Submissions**

Optional Submissions

Completing MPDS/SRS



Quarterly Reports and Annual Assessments are compulsory elements of SRS.

Reviewing Quarterly Reports

You must monitor your Developing Engineer on a regular basis via their Quarterly Reports. Make sure you sign off reports at quarterly intervals to meet your SRS mentor commitment. Several reports logged together shows IMechE and the Engineering Council that monitoring has lapsed and regular feedback has not been provided – if this is the case, Developing Engineers may not be able to use SRS as their route to professional registration.

For years one and two on the scheme, Developing Engineers will need to submit three Quarterly Reports, each around 200-500 words long per section, and can be written in the first person or as bullet points. They should be a summary of contribution, opportunities explored and learning outcomes from errors and failures.

This will be followed by an Annual Assessment which provides an overview of quarter four and the year's achievements as a whole. Your comments provide positive and constructive feedback as well as the assessment levels against UK-SPEC.

In years three (final year for those on the IEng route) and four (final year for those on the CEng route) on the scheme, Developing Engineers will need to submit at least one Quarterly Report for quarter two and an Annual Assessment in quarter four. Submitting a Quarterly Report for quarters one and three is optional.

The graph shows the mandatory submissions.

Compulsory Submissions

Contents and Introduction

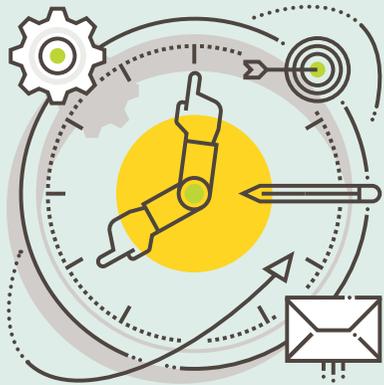
Getting started with the MPDS/SRS tools

Using the MPDS/SRS tools

➤ **Compulsory Submissions**

Optional Submissions

Completing MPDS/SRS



Year 1			
Developing Engineer can claim previous experience to enter the scheme at an agreed quarter. Max: 4 quarters (IEng), 6 quarters (CEng)			
Q1	Q2	Q3	Q4
Mandatory	Mandatory	Mandatory	Mandatory
1 submitted report (submission allows next quarter to start)	1 approved report (approval of both Q1&2 allows next quarter to start)	1 approved report (approval of all Q1,2,3 allows next quarter to start)	1 annual assessment (approval allows Year 2 to start)
Year 2			
Q1	Q2	Q3	Q4
Mandatory	Mandatory	Mandatory	Mandatory
1 submitted report (submission allows next quarter to start)	1 approved report (approval of both Q1&2 allows next quarter to start)	1 approved report (approval of all Q1,2,3 allows next quarter to start)	1 annual assessment (approval allows Year 3 to start)
Year 3			
Q1	Q2	Q3	Q4
Optional	Mandatory	Optional	Mandatory
1 submitted plan	1 approved report (approval allows next quarter to start)	1 submitted plan	1 annual assessment (approval allows completion for those on IEng route or Year 4 to start)
Year 4			
Q1	Q2	Q3	Q4
Optional	Mandatory	Optional	Mandatory
1 submitted plan	1 approved report (approval allows next quarter to start)	1 submitted plan	(allows scheme completion or extension into Year 5 (if necessary))

Compulsory Submissions

Contents and Introduction

Getting started
with the MPDS/SRS tools

Using the MPDS/SRS tools

➤ **Compulsory Submissions**

Optional Submissions

Completing MPDS/SRS

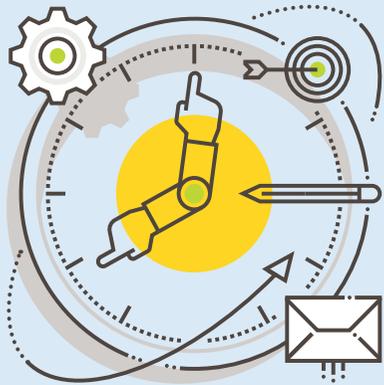
Reviewing Quarterly Reports

To review a Quarterly Report

1. An email will be sent when your Developing Engineer has submitted a Report for you to review.
2. Reports requiring action will appear on your summary page but you can also go to the Quarterly Reports tab and click on the Developing Engineer's name to review it.
3. Review the Quarterly Report and provide some feedback in the comment box. This feedback is compulsory and must be positive and constructive so that it is of value to your Developing Engineer.
4. Select a status for this Report using the radio buttons. If you're happy with it, choose 'Accept Submission'. If you feel the engineer needs to make some changes, select 'Return Submission'.

A Developing Engineer can amend a Quarterly Report if you have returned it to them for revision. Once it has been resubmitted to you, they will not be able to delete it as a permanent record and audit trail has been created.

If Plans and Evidence were submitted, the system automatically adds the competences and evidence summaries into the Quarterly Report. It is important to review Plans, Evidence and Reports in this order so that the information can automatically generate into the Annual Assessment. Once you have approved a Quarterly Report, the Engineer will not be able to add evidence retrospectively.



Compulsory Submissions

Contents and Introduction

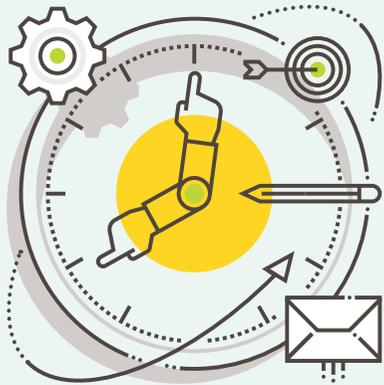
Getting started with the MPDS/SRS tools

Using the MPDS/SRS tools

➤ Compulsory Submissions

Optional Submissions

Completing MPDS/SRS



Annual Assessments

Annual Assessments are due at the end of every fourth quarter and must be completed within two months of this date.

At the end of each fourth quarter, you need to complete the Annual Assessment. It is generated by the Developing Engineer and forwarded to you to review; this pulls together the year's submissions as an accurate reflection of the SRS development of the Developing Engineer. It is also an opportunity to meet and plan for the coming year and quarter.

To review an Annual Assessment

1. Go to the Annual Assessments tab and click on the title of the submission awaiting review.
2. Read the Developing Engineer's evaluation of the period and then arrange a meeting with them to discuss the content of their report.
3. Under each of the competence headings, enter an appropriate assessment level from 1–4 for each competence and click 'update score'. **It is a compulsory requirement for the Mentor to assign a score for each competence.**
4. Answer the four questions on the 'Mentor's Report' tab making sure your comments are an accurate reflection of your Developing Engineer's progress. To save your comments click 'save as draft'.

5. On the 'Details and Competences' tab you can add any further comments you have not included in the Mentor's Report section.
6. Select a status for the Annual Assessment using the radio buttons. If you're happy with it, choose 'Accept Submission'. If you feel your Developing Engineer needs to make some changes, select 'Return Submission'.

Annual Assessments must be completed before the first Quarterly Report of the next year. The MPDS/SRS tools will not prevent this but you are asked to review submissions on time to aid your Developing Engineer's progression. Plans and Evidence can be submitted for the next quarter but further Quarterly Reports should not be added until the previous Annual Assessment is completed.

Optional Submissions

Contents and Introduction

Getting started with the MPDS/SRS tools

Using the MPDS/SRS tools

Compulsory Submissions

➤ **Optional Submissions**

Completing MPDS/SRS

Reviewing Plans and Evidence

An automatically generated email will be sent to you when your Developing Engineer uploads submissions for review. Log in to your MPDS/SRS account and make sure you review the items in the order shown in this toolkit. This ensures that everything maps over correctly to the Quarterly Report and Annual Assessment.

Plans

Whilst creating Plans are optional, they can add valuable content to your Developing Engineer's reports and are highly recommended in their third and fourth years. Developing Engineers submit one plan per quarter to outline the aims, objectives and competences they intend to cover.

To review a Plan

1. Click on the Plans tab to show a list of submitted Plans waiting for your review.
2. Click on the Developing Engineer's name to review it.
3. Check that you are happy with the objectives and competences chosen by your Developing Engineer and provide some feedback in the comment box.
4. If you're happy with the Plan, choose 'Accept Submission'. If you feel the Developing Engineer needs to make some changes, select 'Return Submission'.



Evidence

Your Developing Engineer may or may not choose to submit evidence of how they've met their competences through activities such as taking on a team leader role, investigating possible causes of failures, making recommendations on quality and risk or preparing findings for reports.

Often, evidence of particular projects is confidential. If you find commercially sensitive information has been submitted please discuss this with the Developing Engineer. You can also email us at SRS@imeche.org so we can delete it. Personal items and non-sensitive items, such as appraisals, can be uploaded.

You do not have to score evidence that has been submitted but it may help your Developing Engineer recognise any areas they need to work on. Approval of evidence is mandatory. By approving an evidence submission, you are confirming that any competences they have assigned to evidence have been met.

To review Evidence

1. Under the Evidence tab, click on the Developing Engineer's name to view evidence submission.
2. Review each Competence and add a score. **Remember to click on 'Update Score'** for each Competence.
3. Provide some feedback on the evidence and click 'Save'.
4. If you're happy with the Evidence, choose 'Accept Submission'. If you feel the Developing Engineer needs to make some changes, select 'Return Submission'.

Completing MPDS/SRS

Contents and Introduction

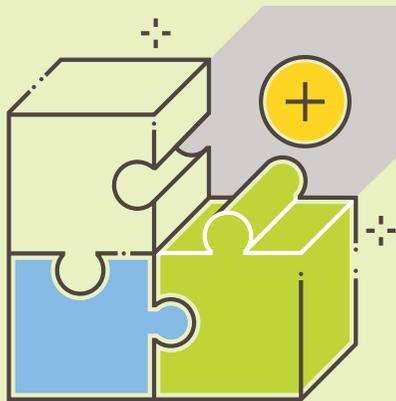
Getting started
with the MPDS/SRS tools

Using the MPDS/SRS tools

Compulsory Submissions

Optional Submissions

➤ **Completing MPDS/SRS**



SRS is not time-serving but Chartered Engineer applicants should aim for at least four years of Initial Professional Development (IPD), with at least two and half years on SRS. Incorporated Engineer applicants should aim for at least three years of IPD, with at least two years on SRS.

When your Developing Engineer has finished their IPD and reached an appropriate level of competence within UK-SPEC for CEng or IEng, you should acknowledge this by ticking the Final Annual Assessment checkbox within the last Annual Assessment. If you feel your Developing Engineer is not quite ready for registration, advise them to continue their SRS development activity, maintaining Quarterly Reports until they have the appropriate levels of professional competence. To extend your Developing Engineer's scheme please email us at SRS@imeche.org with their name, membership number and duration of the extension in quarters. They can report up to a maximum of Y6Q4.

Applying for Professional Registration - CEng MIMechE or IEng MIMechE

When your Developing Engineer is ready to apply for professional registration and full membership, they should complete the online application form available within the My Account area. To access this, they will need to go to Online Applications, then select Online Application Checker. Under the Online application forms section will be the link to both the Chartered Engineer and Incorporated Engineer application forms.



For any membership enquiries:

Email membership@imeche.org
or call +44 (0)20 7304 6999