

# **SDPR**

## **Conducting an effective review**

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**Workforce Development Team 2024-25**

# Domestics and Introductions



Introduce yourself  
to colleagues on  
your table

Discuss what you  
would like to learn  
today?

# Intended Learning Outcomes

- Describe the key principles of an effective SDPR / career conversation
- Explain whether an SDPR or career conversation is used
- Describe the process
- Describe the key elements
- Understand the core skills
- Practice using core skills

# Working together

Interactive

Safe space

Breaks

Feedback

# SDPRs at the University

## Purpose

The Staff Development and Performance Review (SDPR) is an opportunity for a purposeful conversation away from the day-to-day, to focus on the staff member and their wellbeing, performance and development.

## It's not about the form

The SDPR form offers a structure for a conversation and enables record-keeping, but filling out the form is not the purpose of the SDPR and should not be the focus.

## It's good to talk

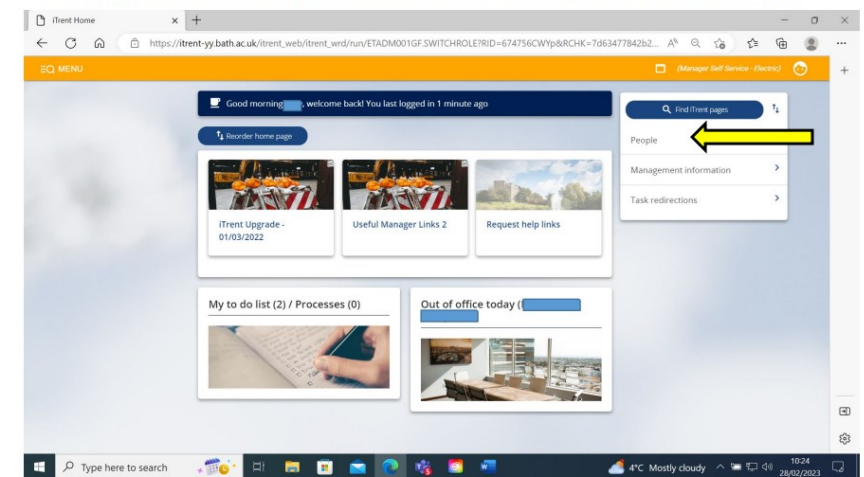
Your review should focus on a high-quality conversation that raises awareness of a reviewee's successes, challenges, strengths and development needs. It should be held at a minimum annually.

# General principles

- Core staff, approximately six months after completing probation
- Professional services staff by line manager
- Academic staff – “best person” principle
- Reviewee identifies and selects relevant form
- Follow meeting, reviewee completes form
- Manager uploads forms to iTrent

## Line Manager Guidance to uploading SDPR Forms in Manager Self Service (MSS)

- Log in to MSS - this will take you directly to the MSS Homepage. Click on the 'People' button on the menu on the right-hand side.



# Career conversation or SDPR?

[Career conversations record form and guidance](#)

[sdpr-education-research.docx](#)

**Career Conversation**

**What is it?**

A conversation, structured with purpose, which allows you to reflect and focus on your career, your successes, strengths and potential. It should build on those to set goals and make commitments for the future.

**What should it produce?**

- 1) A clear, evidence-based and evidence-based sense of how you are doing with respect to:
  - a. Your own evaluation and aspirations
  - b. The expectations of someone in your role
  - c. The context for your life, the department's discipline, University and beyond
- 2) Clear goals that will help you feel confident at work and achieve your potential
- 3) An individual plan of your career path and how you will respond to opportunities

**Key questions**

**What are you doing, across the range of your job, that motivates and energises you?**

**What do you understand about your current level of work and how it meets a third party's needs?**

**What is the way to "break good thinking" that will allow you to achieve your ambitions, address what matters?**

**Self awareness**

What are you doing and how do you know it?

**Values and aspirations**

What is important to you?

Four elements of a career conversation

**Context**

What's happening around you?

**Goals and plans**

What tangible steps will you take now?

**Process**

**Reflection:** Based on critical assessment of last year's objectives and activities, make a clear, evidence-based sense of how this relates to what you, and the University, would expect you to be doing at this point in your career. Pass it on to your reviewer ahead of the meeting.

**Discussion:** Work with your reviewer to design a path towards achieving your goals, taking into account what's right for you and what's happening in the University and your discipline.

**Commitment:** Form a clear plan of action to move along this path, and agree to you know what steps you are committing to take (including when you will ask for support) and how you will judge your success.



**Staff Development and Performance Review**

For staff in grades 3 and above in the following job families:  
 Management, Specialist and Administration (*not* in departments using the Effective Behaviours Framework)  
 Technical and Experimental  
 Operational and Facilities Support

The principal aims of the SDPR scheme are to:

- Review the past year, providing feedback, identifying successes and learning from problems in the achievement of last year's objectives
- Plan and set goals for the future, taking into consideration the objectives of the department, the knowledge, skills and attitudes of the member of staff and their career development aspirations.

This form should focus the discussion between reviewer and reviewee, so that you can have useful conversations about achievements, performance, aspirations and future plans, and make a record of agreed outcomes and objectives for future reference.

Full Name:
Job title:
Department:
Date of SDPR meeting:
Reviewer:
Reviewer's post:
Period covered by this SDPR:
<i>Please complete all fields</i>

## Process

- The reviewee should provide the reviewer with an account of their progress against the agreed objectives for last year, plus any other activities (Section A). Initial thoughts may be included in sections B and C. Attach a current job description where appropriate.
- The reviewer may make initial comments in section A and return these to the

# Activity

In groups:

Q: As a *reviewer*, what do you want to get out of an SDPR?

Q: As a *reviewee*, what do you want to get out of an SDPR?



**DISCUSS**



# SDPR Process

Workforce Development



# SDPR Process

Workforce Development



**Contracting** is the process of creating clear agreements between the and staff member about their roles, responsibilities, and expectations to ensure a successful appraisal process



# Key elements

## Workforce Development



### Checking in

This is a chance to deepen your understanding of your reviewee and explore what else might be needed to ensure they can perform their role and stay healthy

### Reflection

Take time to reflect. Talk about what it was possible to achieve from last year's objective list and give feedback about how people have been doing. What are the positive and successful behaviours you've noticed, and what could be improved or developed?

### Looking ahead

What goals can you set, within the limits of uncertainty about the coming year? Planning for different scenarios may be helpful. It is helpful to set some concrete goals but be sure to acknowledge that achieving some may depend on circumstances beyond your control.

### Commitment

Agree goals and objectives wisely according to the circumstances and ensure that your reviewee – with your support – is committed to them.

### Development

What are the longer-term ambitions of the reviewee, and how can they be supported and aligned with the University's needs? What new skills, knowledge or ways of working should be in the plan for the year ahead?

# Keeping a record

- The forms help you to capture the main thoughts and commitments from your conversation.
- The forms are uploaded to iTrent to keep a record and to report on the number of people who have had an SDPR.
- Staff are also asked to appropriately engage with development and performance processes within the department to be eligible for the outstanding contribution scheme.
- The content of the form is not checked by HR - it's a record that the staff member and reviewer can refer back to.

# Push/pull communication

## PULL



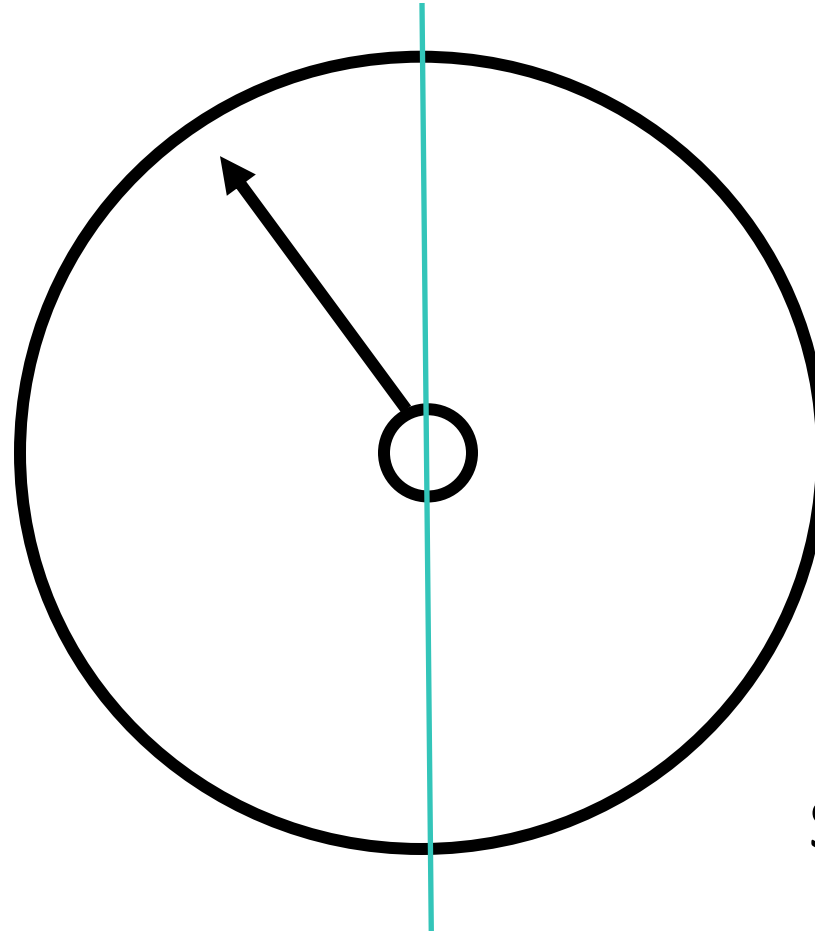
Your agenda

Active listening &  
curiosity

Empowerment

Motivation

Coaching



## PUSH



My agenda

Reason & logic

Clarity

Setting direction/pace

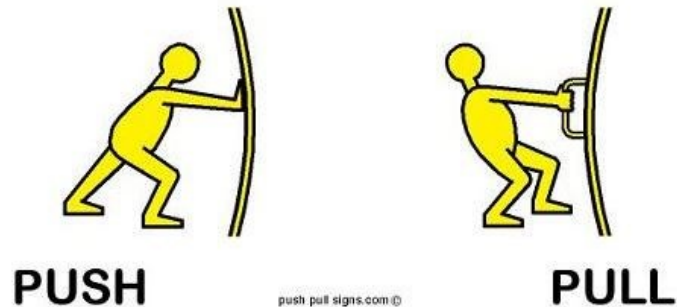
Directing

# Activity

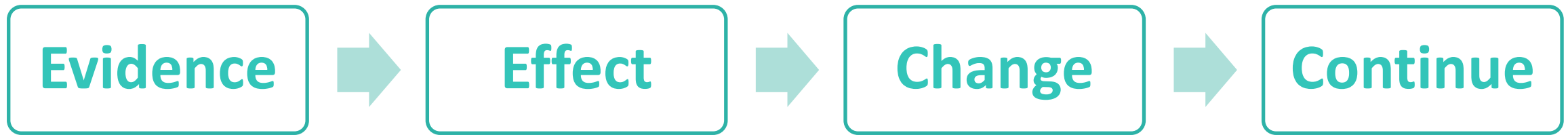
In groups:

Q: Where on the push/pull model do you feel most comfortable?

Q: When would it be useful to take a different approach?

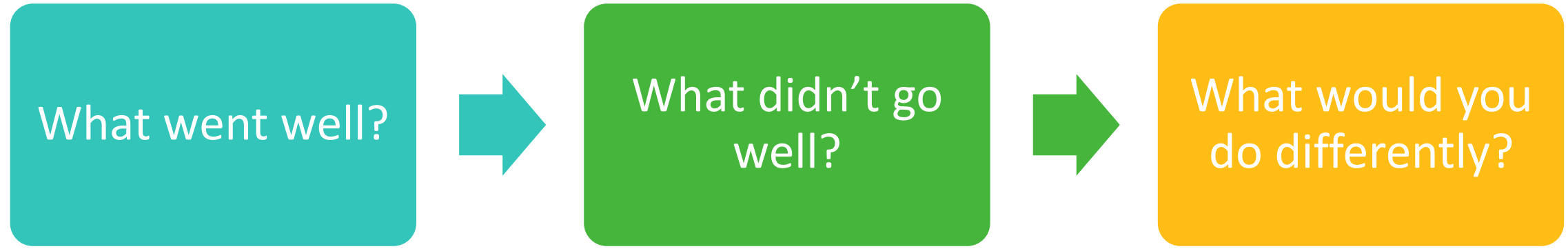


# Model 1 - Feedback



*“Your last couple of reports have contained some factual errors (describe what these were). This undermines our credibility and means that we need to re-issue the report with corrections, which takes time. I suggest that in future you double check all the figures and then ask someone to proofread them for you before you submit the report. You have a real flair for writing reports and getting them out on time. Let’s find a way to keep delivering them on time without compromising on accuracy.”*

## Model 2 - Review





# Model 3 - GROW

## Way forward

- Which option or strategy do you choose to pursue your goal?
- What are the specific actions and steps you need to take?
- When will you start and finish each action? How will you monitor and evaluate your progress? How confident are you that you can follow through with your action plan?

## Goal

- What would you like to achieve by the end of ...?
- How does this goal relate to the university?
- How will you know when you have reached your goal?
- What will be different when you achieve your goal?

## Options

- What are some possible ways to overcome the barriers or challenges you face?
- How would you rate each option in terms of feasibility and desirability?
- What are the benefits and drawbacks of each option? What else could you do that you haven't thought of yet?

## Reality

- What is the current situation with your goal? How do you feel about it?
- What have you tried so far to move towards your goal? What has worked and what hasn't?
- What is stopping you from reaching your goal?

# Activity

**In groups:**

Q: Which of these tools would you like to use?

Q: Why?

Q: What challenges do you anticipate?

Q: What could do to prepare?

Q: How will you know the SDPR has been successful?

# Further Resources

Workforce **Development**



[Preparing and completing an SDPR: reviewers and reviewees \(bath.ac.uk\)](#)

[SDPR: Conducting an effective review \(bath.ac.uk\)](#)

[Uploading and viewing SDPR forms in iTrent \(bath.ac.uk\)](#)

[University of Bath Development Toolkit | Conducting Performance Reviews \(goodpractice.net\)](#)

# Action planning

- Share one thing you are going to do after this session.
- Share one thing you'd like to know more about.



# Management development CPD

- [Management curriculum](#) e-learning and workshops
- [Management toolkit](#) plus weekly email
- Access to [LinkedIn Learning](#)
- Leadership conversations – 3 times per year
- Leadership development programmes
- [One to one coaching](#)

# | Thank you

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