

Achievement and Development Review Guidance

FOR PROFESSIONAL SERVICES STAFF



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WHAT ARE ACHIEVEMENT AND DEVELOPMENT REVIEWS?

Achievement and Development Reviews (formerly known as appraisals) are a formal annual conversation between a member of staff and their line manager (or equivalent). This conversation is an opportunity to reflect on the past, both celebrating achievements and discussing challenges, to plan for the year ahead and check in on wellbeing and development needs. The [Achievement and Development Review form](#) should be used to help prepare and record the joint decisions from ADR conversations.

All Professional Services staff are expected to complete an Achievement and Development Review with their line manager by the 30th of September. A set of [guiding principles](#) have been created to provide clarity and promote consistency in undertaking review conversations for all staff across the University, which are included in the appendix.

The ADR form is completed as part of your annual review, but this should be seen as just one part of an ongoing conversation around performance, achievements, development and wellbeing. In addition to your annual ADR review, you should ideally have 3-4 follow-up conversations over the following 12 months.

ADRs are	ADRs are not
An opportunity to recognise achievements and celebrate success	A time to address poor performance – this should happen when any issues first arise.
A two-way conversation to discuss challenges experienced and to agree clear achievable objectives for the year ahead	A chance for the line manager to dictate exactly what they want an employee to do over the next 12 months
A chance to discuss career aspirations and explore development opportunities	A normal 1:1 meeting where day-to-day tasks are discussed
A safe and supportive space to check-in on wellbeing and signpost to appropriate support where needed	An unsupportive space where the reviewee feels judged and unable to speak openly or safely

GUIDANCE FOR REVIEWEES

THE BENEFITS OF HAVING A MEANINGFUL ADR CONVERSATION

We know that for some people, annual reviews can feel overly bureaucratic. However, if done properly, conversations like this provide a valuable opportunity to discuss career aspirations and development needs, or development options to grow within their current role. It is also an opportunity to provide real clarity on agreed objectives and expectations that will set you up for the year ahead. This guidance resource has been created to help you get the most out of your ADR conversation. On the following pages, we'll run through how to prepare for your ADR, what to do during the conversation and how to follow up so you experience genuine, lasting impact. By taking the time to properly engage with the ADR process, you are taking ownership of your career and development during your time at the University of Sussex.

PREPARING FOR AN ADR CONVERSATION

To get the most out of your appraisal, it is important you take the time to prepare. This means reflecting on what you're most proud of over the last year, what could have gone better, and what you would like to achieve in the year ahead. Once you're clear on your objectives and aspirations, you'll be better placed to identify what support you need, what you need to learn and any skills you need to develop. You can share these ideas with your manager, so that together you can create a personalised development plan.

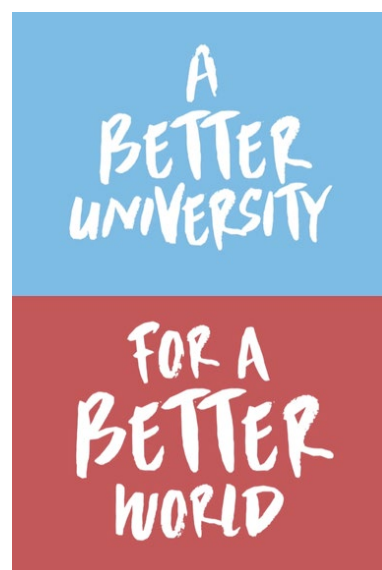
Another area to consider is how your role contributes to divisional or organisational priorities and strategies. By ensuring your objectives align with wider initiatives, you can demonstrate the positive impact you are having at Sussex. If you need help with this, speak to your manager in advance.

It is also important to consider the [Sussex values](#) while you review your work and think about the year ahead. Our Sussex values define the behaviours and competencies we expect from everyone who works for the University. Make sure you consider how you are demonstrating our values through your work and think about ways you can help create the right environment to allow these values to flourish.

To support Sussex's commitment to equality, diversity and inclusion (EDI), the ADR provides a space for the reviewee to reflect on how the University's values, including EDI considerations, are demonstrated within their role on an individual, team and/or wider network level, and to discuss their own experiences, as is felt appropriate.

This includes:

- A recognition that in any role and in any team, what we/others do and how we/others do it will always have an impact on people.
- This includes the role we carry out and the way in which we and others conduct ourselves.
- The importance of diversity and of understanding the needs, perspectives and experiences of people different to ourselves, enabling us to identify and address potential barriers.
- Even when working within predetermined systems and processes it is still our responsibility to identify, highlight and address inequalities.



KINDNESS - INTEGRITY - INCLUSION - COLLABORATION - COURAGE

To support conversations around EDI, ensure you have completed the mandatory training on [Diversity in the Workplace](#) and [Unconscious Bias](#) on LearnUpon.

ADR conversations are also an opportunity to discuss your mental health and wellbeing. By having an open conversation with your manager, you can identify any support needs or reasonable adjustments that will set you up to thrive for the year ahead. To help prepare for this part of the conversation, you might find it useful to look through this [Wellness Action Plan](#) resource.

Complete the [ADR form](#) and share it with your manager at least 3 days before you meet so that they have enough time to review the content.

For further guidance and information, including online learning, videos and podcasts, visit the LinkedIn Learning pathway for Reviewees, [Preparing for your Achievement and Development Review \(formerly Appraisals\)](#).

HAVING A MEANINGFUL ADR CONVERSATION

To get your ADR conversation off to a good start, make sure you arrive in the right frame of mind; fully present, calm and open to different opinions and perspectives. Every ADR conversation should follow this structure:

	Purpose	Possible questions
Review of the past	Recognise achievements, identify challenges/obstacles and capture learnings	<ul style="list-style-type: none"> • What are you most proud of? • What got in your way? • What could you have done differently? • What have you learnt?
Looking to the future	<p>Set specific, realistic and measurable objectives for the year ahead (what you will be doing)</p> <p>Consider how to embody the Sussex values (how you will be doing it)</p>	<ul style="list-style-type: none"> • What do you want to achieve? • How/when will you deliver this? • Who do you need to work with to get this done? • What wider strategies will this work align to? • Which Sussex values will you role-model/embed through this work?
Additional support, development or wellbeing needs (hybrid/remote working)	<p>Set clear development objectives, with timeframes.</p> <p>Identify any other support needs and how to meet them.</p>	<ul style="list-style-type: none"> • What skills/knowledge do you need to support you in your role? • What learning/development opportunities are available to you? • How will you know when this has been achieved?

SETTING SMART OBJECTIVES

One of the most important outcomes from an ADR conversation is a clear set of objectives. We encourage people to set SMART objectives to ensure that both parties are clear on what needs to be achieved and to avoid ambiguity – this stands for Specific, Measurable, Achievable, Realistic and Time-bound.

Specific: The objective should be very clear with no room for misinterpretation.

Measurable: The objective should be quantifiable, and progress should be easy to track.

Achievable: The objective should be attainable — not too small or too big or unrealistic.

Relevant: The goal should contribute to wider Divisional/School or organisational objectives

Time-bound: The goal should have a defined start and end date.

You may not always be able to meet all these criteria but the more SMART criteria you apply, the greater clarity you will have and the easier it will be to track progress, plan your workload and demonstrate impact.

It is important to remember that objectives are not set in stone. They are there to help guide your work and in today's turbulent climate, we must be ready to adapt and respond to change. That is why we recommend that you regularly review your objectives with your manager to check that they are still relevant. Better to change your objectives throughout the year so they remain meaningful to you, your manager and your Division/School, than deliver outdated objectives.



GUIDANCE FOR REVIEWERS

WHAT IS THE IMPACT OF QUALITY ADR CONVERSATIONS?

We know that people perform at their best when they feel valued, have clear objectives and opportunities to learn and develop. As a manager and/or leader, it is your role to support each member of your team to thrive at work, recognising achievements, setting realistic objectives and identifying opportunities for development.

ADRs are an opportunity to have a quality conversation about all the above. It is a chance to discuss any obstacles or challenges that have hindered an individual's performance and have a constructive discussion around how to overcome them. It is a moment to listen and understand what motivates an individual and understand where their strengths lie; what do they want to be doing more of? What do they want to learn? Having open and supportive conversations like this will build trust across your team, which in turn improves collaboration, team engagement and wellbeing.

PREPARING FOR AN ADR CONVERSATION

As the person conducting the review, it is your responsibility to create the environment for a positive and supportive conversation.

Do

- Consider the needs of the individual. What days/times work best for them (e.g. consider caring responsibilities, work deadlines or cultural/religious factors).
- Arrange the meeting at least 2 weeks in advance, giving the individual plenty of time to prepare
- If meeting in-person, make sure you have an appropriate place to meet (if unsure, check with the individual where they would feel the most comfortable).
- Leave your diary free immediately before and after the ADR so you don't feel rushed.

Avoid

- Having an important meeting/deadline directly after the ADR conversation, which could be distracting.
- Scheduling back-to-back ADR conversations. Spread them out so you can give each your full attention and have time to reflect after each one.
- Turning up with assumptions, or a set of pre-determined objectives or outcomes.

For further guidance and information including online learning, videos and podcasts, visit the LinkedIn Learning pathway for Reviewers, [Preparing for Achievement and Development Reviews \(formerly Appraisals\)](#).

SKILLS FOR A GREAT ADR CONVERSATION

Listening

We often take it for granted, but listening with full, undivided attention is a skill that requires intention and practise. To ensure the reviewee feels valued and supported, remove anything that might distract you during the conversation. When listening, focus on what is being said rather than thinking about what you are going to say next, and ask clarifying questions to check your understanding. It can also be helpful to reflect on what you've heard, to make sure you both interpret the conversation in the same way.

Coaching

Coaching is about helping an individual find positive ways forward, by helping them explore their options and view things from different perspectives. Most importantly, coaching is non-directive, which means you aren't giving advice. Instead, you are creating the space for someone to find their own solutions, which will ultimately have much more impact than simply telling someone what they should do. Here are some example questions:

- What options are available to you?
- What advice would you give to someone in a similar position to you?
- What would be your best-case scenario/outcome here?
- How could you achieve that?
- What's the biggest challenge here?

There are also several Management Essentials workshops which cover the skills needed for meaningful ADR conversations. You can view the workshop schedule on the [OD events page](#).

AFTER AN ADR CONVERSATION

Following an ADR conversation, both Reviewer and Reviewee need to update the form and add their comments. Both parties should have signed off the form within 1 week of the meeting – and both should keep a copy for future reference. The ADR is confidential between the Reviewer and Reviewee. However, details can be shared with the consent of the Reviewee. This may be appropriate for a Discretionary Pay Review or promotion process. See the overview of the whole ADR cycle on page 9.

WHAT HAPPENS TO ANY RECORDS?

The written record of the review meeting is confidential to the Reviewer and the Reviewee. Records of reviews should be kept for two years. When someone leaves the University their review records are destroyed unless it is anticipated that there will only be a short break in contract and that they will be returning to the same Division. Divisions must establish procedures for the storage of these documents to ensure confidential access in line with the [Records Management Guidance](#).

ANNUAL ADR SUMMARY REPORTS

GUIDANCE FOR DIRECTORS

Directors have responsibility within their area for ensuring that the ADR process is carried out each year for all staff within their division, and within the agreed time frame.

The process requires Directors to collate and submit an Annual Achievement and Development Review Summary to the Assistant Director of Culture, OD & Wellbeing on an annual basis. While it is the responsibility of Directors to ensure that this ADR Summary requirement is fulfilled, this task may be delegated to one or more colleagues within the division.

The Annual Achievement & Development Review Summary online form will be sent to Directors for completion after the ADR season has concluded in November of each year. Completion of this form is important as recording numbers of annual reviews undertaken is a key People Strategy priority and is measured through the Staff Survey. All information submitted in the report is anonymized.

This report serves three purposes:

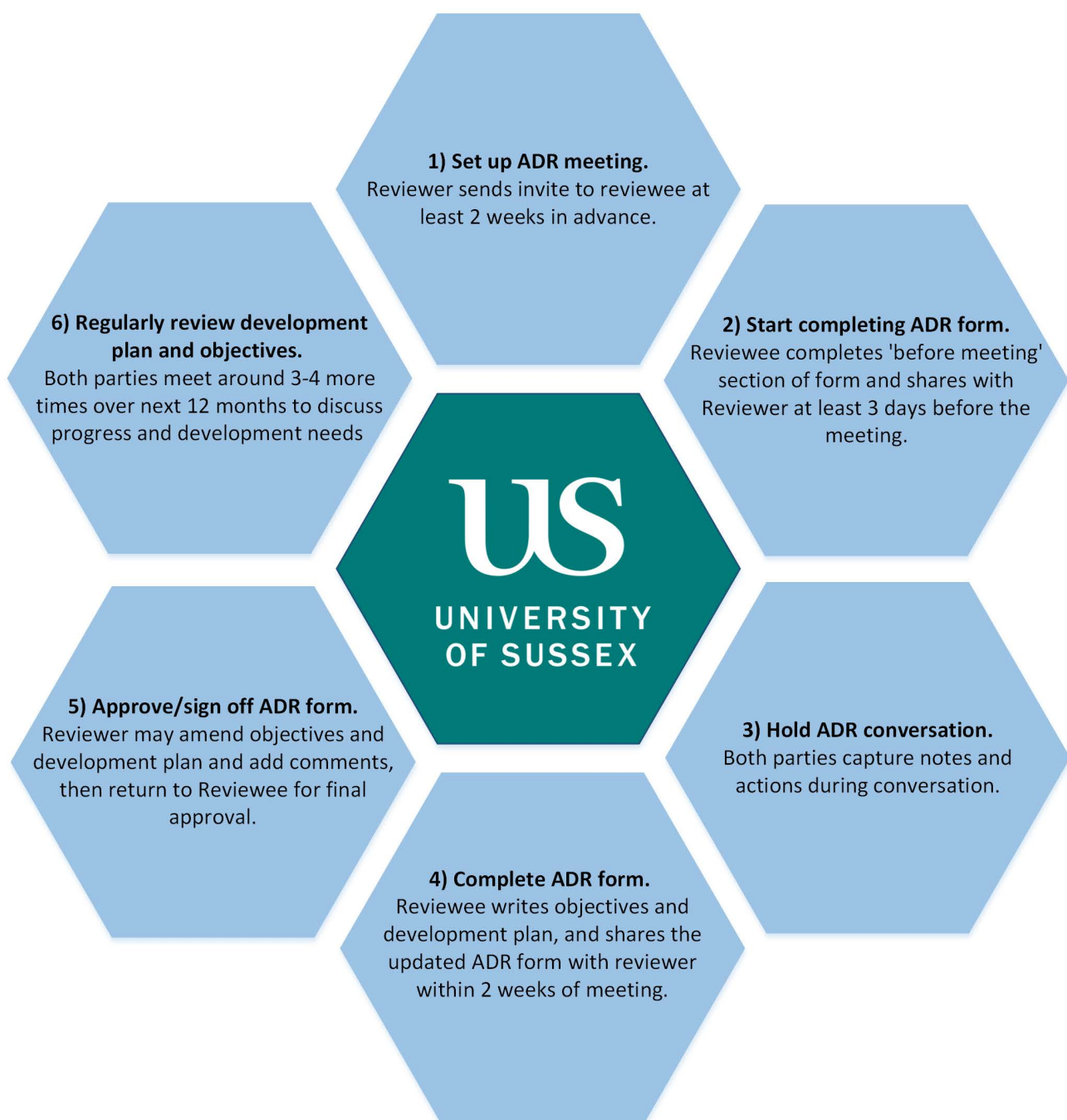
- It provides assurance that individuals are having annual achievement and development reviews.
- It informs the Division about its collective activities, achievements, and development needs.
- It provides a vital source of information to the University on the learning and development needs of its people.

The Annual Achievement & Development Review Summary Report will be based on the anonymized high-level summary statements produced during review meetings of individual staff members. It should include the following:

- The number and percentage of staff that have had an ADR during the review period.
- A summary of those individuals not reviewed e.g. new staff, staff on maternity leave, those leaving the institution etc.
- Areas identified for further support such as further learning and development and Professional and Career Development Planning. These will be common themes arising from the review process e.g., report writing, time management, project management, etc.

All Annual Achievement & Development Review Summary forms should be submitted in time for the Spring meeting of the Organisational Development team, and the People, Culture and Inclusion Committee (PCIC). From the information provided within the Annual Achievement & Development Review Summary forms, an executive summary of the University-wide information will be collated and submitted for consideration by PCIC. The more detailed learning and development needs will be considered by colleagues in the Organisational Development team, who will discuss learning solutions with the Director or other appropriate staff member. Information on the percentage of staff receiving an annual achievement and development review within each Division will be reported to Council at the end of the Spring term.

THE ADR CYCLE FOR PROFESSIONAL SERVICES



APPENDIX

GUIDING PRINCIPLES

1. A Line Manager is responsible for all 'people processes' e.g. probation oversight (with panel), ADRs, holiday approvals, sickness, absence, etc.
2. ADRs should be carried out with the Line Manager or their delegated reviewer in the same Division at a higher grade than the reviewee, who has, or will build, a long-standing relationship, someone who knows and cares about the individual.
3. Reviewers should have an agreed maximum number of reviewees (approx. 8) to ensure capacity and right level of attention to ensure the process is valued and is of value.
4. Reviewers are expected to undertake training and be provided with clear guidance.
5. ADRs include a review of the past, a preview of the future, and a focus on development and wellbeing, supported by regular ongoing conversations throughout the year. Consideration of how the University values are embedded in the review should be part of the conversation.
6. An ADR is confidential but certain elements of the agreed outputs can be extracted and shared subject to the consent of the reviewee (e.g. development needs, agreed actions and plans that require resourcing and integrating into wider Division and University strategy, or for Discretionary Pay Review purposes).
7. The outputs from the ADR should include a set of achievable and measurable annual objectives, agreed priorities and an agreed development plan relevant to the individual's role.
8. The ADR will involve a joint evaluation of progress against objectives and delivery against plans.
9. The ADR should include a discussion about work-life balance, wellbeing, longer-term career ambitions and development opportunities.
10. To support Sussex's commitment to equality, diversity and inclusion (EDI), the ADR provides a space for the reviewee to reflect on how the University's values, including EDI considerations, are demonstrated within their role on an individual, team and/or wider network level, and to discuss their own experiences, as is felt appropriate.

FURTHER SUPPORT AND RESOURCES

- Workshops (online and in-person). Visit the [Organisational Development pages](#)
- Online learning course: [Preparing for Achievement and Development Reviews \(for Reviewers\)](#)
- Online learning course: [Preparing for your Achievement and Development Review \(for Reviewees\)](#)
- Upcoming dates of [Management Essentials workshops](#)
- [Leaders and Managers Network](#) on Teams
- [The Managers Toolkit](#)

If you require any further support related to Achievement and Development Reviews, please contact the Organisational Development team by emailing od@sussex.ac.uk



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