



## HR-P-016 Managing for Growth & Change

### 1. PURPOSE

The purpose of this procedure is to outline the process for MacKillop Family Services' (MacKillop) performance management system 'Managing for Growth & Change'.

### 2. SCOPE

This Procedure applies to all permanent and/or fixed term Employees of MacKillop employed for 6 months or more. Depending on when the Employee commences, the work plan must be completed commensurate with what time remains in the review cycle.

### 3. DEFINITIONS

Term	Definition
Work and Development Plan	Template to be used to record day-to-day work plan expectations/goals and decisions arising from the assessment of the expectations/goals. It also records a learning and development and career plan.
Employee	Any part time, full time or fixed term Employee of MacKillop for a tenure of 6 months or more.
S.M.A.R.T. Goals	<p>These make up the Work and Development Plan Goals. They must be Specific, Measurable, Achievable, Realistic/Relevant, Timebound.</p> <p>SMART goals are:</p> <ul style="list-style-type: none"> <li>• Specific – Clearly describe outputs to be achieved to ensure clarity for Supervisor and Employee on what is expected.</li> <li>• Measurable – Allows for success to be clearly identified so that it is clear when the results have been achieved or exceeded. These might be numeric (quantitative) or non-numeric (qualitative). Numeric measures are usually expressed as a number, ratio or percentage. Non-numeric measures are generally expressed in</li> </ul>

	<p>words.</p> <ul style="list-style-type: none"> <li>• Achievable – Enough stretch to make it interesting and challenging, but not so much stretch that it is unachievable.</li> <li>• Realistic /Relevant– Ensure that they are attainable.</li> <li>• Timebound – Ensure that a timeframe is specified.</li> </ul>
Supervisor	An Employee who is responsible for managing the performance of others. The term ‘Supervisor’ refers also to the role of Manager, General Manager, Director or CEO.

#### 4. PROCEDURE

##### 4.1 The Work and Development Plan

Supervisors and Employees develop a Work and Development Plan by identifying mutually agreed day-to-day job expectations, including development needs, career goals and aspirations. Work and Development Plans are usually developed in the months January, February and March each year.

The resources needed to complete this phase are:

- Work and Development Plan Template
- MacKillop’s Performance Management System’s ‘how-to’ guide
- Current position description
- Other relevant documentation such as MacKillop’s Strategic Plan, the relevant program area plan and the Supervisor’s Work and Development Plan

##### 4.1.1 Step 1 - Become Familiar with The Performance Management System and Templates

There are three parts to the template:

- Job/Career Goals and Aspirations
- Work and Development Plan
- Performance Review

#### 4.1.2 Step 2 - Prepare for the Performance Planning Meeting

It is important for both Supervisors and Employees to prepare for the performance planning meeting. While this is a shared responsibility, each person has different responsibilities. (Refer to MacKillop's Performance Management System's 'how-to' guide for the Employee and Supervisor's responsibilities)

#### 4.1.3 Step 3 - Conduct the Performance Planning Meeting

The performance planning meeting is where a Supervisor and Employee meet to discuss and record mutually agreed day-to-day job expectations, development plans and career goals and aspirations.

Using the Work and Development Plan Supervisors and Employees need to work through the planning process together.

### 4.2 Completing the Work and Development Plan

#### 4.2.1 Part 1: Job/Career Goals and Aspirations

This part of the template is optional, however it is valuable to complete and discuss in the performance planning meeting. A series of questions are provided to stimulate a discussion on how Employees are travelling in their job and what their career path might be. (Refer to MacKillop's Performance Management System's 'how-to' guide for the Employee and Supervisor's responsibilities)

#### 4.2.2 Part 2: Work Plan

There are three elements that make up an individual Work and Development Plan. These include:

- (a) Day-to-day goals - this section focuses on a person's day-to-day job and relates to tasks that are associated with their core job. The plan requires four to six SMART goals for each year. These goals must be cross-referenced to the parts of the program area plan that are relevant to the person's job. This includes 4 mandatory Key Goals – Compliance, Finance, Program Services/Projects and Team Work/Supervision. (Refer to MacKillop's Performance Management System's 'how-to' guide for detailed descriptions)
- (b) Living MacKillop's Values and our Sanctuary Commitments – this section focuses on **how** someone goes about their job, that is, the behaviours they demonstrate in carrying out their day-to-day job responsibilities, as this is equally as important as what they do. Employees need to review MacKillop's Values and our Sanctuary Commitments and articulate how they will demonstrate two - four behaviours in their day-to-day job as a SMART objective. (Refer to MacKillop's Performance Management System's 'how-to' guide for factors to consider when completing this section)

- (c)** Learning and development plan - this section focuses on job readiness, capability and career aspirations. Employees need to reflect on the skills, knowledge and personal attributes required in their current job and then self assess against these to determine their areas of strength and potential areas for development. Learning and development plans can also be informed by career aspirations.

Once a person has identified their development needs, with support from their Supervisor, they will need to:

- identify no more than three development goals (for example two for job readiness and one for career)
- determine how these will be developed and what action/s will be taken (refer to Appendix 1 of MacKillop's Performance Management System's 'how to' guide for further information on development options available)

#### **4.2.3 Responsibilities**

While conducting the performance planning meeting is a shared responsibility between a Supervisor and Employee, each has different responsibilities. (Refer to MacKillop's Performance Management System's 'how-to' guide for the Employee and Supervisor's responsibilities)

#### **4.3 Supervision**

The key to successful performance management is ongoing feedback, coaching, support and monitoring, referred to as 'Supervision'. Feedback should be regularly given and sought throughout the performance management cycle.

Giving and receiving feedback is a shared responsibility. (Refer to MacKillop's Performance Management System's 'how-to' guide for tips for ongoing feedback and monitoring/supervision)

Supervisors must meet with their Employees for Supervision at least every 2-4 weeks and provide more frequent and focused performance feedback and coaching to Employees who are experiencing difficulties with particular aspects of their work. Supervision is also an opportunity to identify development opportunities as they come up.

Employees who require close attention, due to the nature of their role or because of performance issues, should receive feedback at least once a week, as well as incidental feedback on issues as they arise.

Supervisors must address any ongoing issues with performance in accordance with MacKillop's Managing Unsatisfactory Performance and Misconduct Procedure.

All Supervisors are required to maintain a record of supervision they have conducted with Employees. It is recommended they use the 'Supervision and Feedback Record' template.

A record of when supervisors meet with each Employee must be recorded on the 'Supervision Summary Sheet'. At the time of reviewing the performance of a Supervisor, it is expected that the 'Supervision Summary Sheet' of all their Employees will be included in the review process.

#### **4.4 Six-Month Review**

This phase is the first formal review in the cycle and usually takes place in the month of **August** each year for the purposes of reviewing Employees' progress against their work plan.

The outcomes of this review are recorded in two places. Firstly as specific feedback in Part 2 against all goals and secondly, in Part 3 Performance Review – Work Plan assessment and Comments and signatures (refer to the Work and Development Plan).

This phase requires Employees and their Supervisors to engage in effective performance feedback conversations. It is an opportunity for Employees to discuss their progress against agreed job expectations/key goals and the actions required to support Employees in achieving their objectives.

The resources needed to complete this phase are:

- Current Work and Development Plan
- Tips for ongoing feedback and monitoring (refer Appendix 2 of the 'MacKillop's Performance Management System's 'how to' guide).
- Note that there is opportunity to record specific feedback and comments against the key goals on an ongoing basis throughout the cycle that contributes to the formal review (refer Part 2 'Feedback and Review Comments').

**4.4.1** The six-month review involves a two-way performance conversation with different responsibilities for Supervisors and Employees. (Refer to MacKillop's Performance Management System's 'how-to' guide for the Employee and Supervisor's responsibilities)

**4.4.2** At the conclusion of the review, both the Employee and Supervisor complete and sign Part 3 of the Employee's Work and Development Plan – 'Performance Review – Work Plan assessment and Comments and signatures'. Copies are retained by both parties.

## 4.5 Twelve-Month Review

This phase is the final review in the cycle and usually takes place in the months of January and February each year. The outcome of this final review informs the performance assessment for the cycle.

The outcomes of this review are recorded in two places. Firstly as specific feedback in Part 2 against all goals and secondly, in Part 3 Performance Review – Work Plan assessment and Comments and signatures (refer to the Work and Development Plan).

Employees and their Supervisors are required to engage in an effective performance feedback conversation on overall performance throughout the cycle. This involves assessing each Employee's performance against the expectations of them in the job.

All SMART Goals identified for the day-to-day job, 'Living MacKillop's values and our Sanctuary commitments' and learning and development plans, must be met for a satisfactory outcome to be achieved.

The resources needed to complete this phase are:

- Current Work and Development Plan
- Tips for ongoing feedback and monitoring (refer to Appendix 2 of MacKillop's Performance Management System's 'how-to' Guide).
- Note that there is opportunity to record specific feedback and comments against the key goals on an ongoing basis throughout the cycle that contributes to the formal review (refer Part 2 'Feedback and Review Comments').

**4.5.1** The twelve-month review is a two-way performance conversation between a Supervisor and Employee and each has different responsibilities. (Refer to MacKillop's Performance Management System's 'how-to' guide for the Employee and Supervisor's responsibilities)

**4.5.2** At the conclusion of the review, both the Employee and Supervisor complete and sign Part 3 of the Employee's Work and Development Plan – 'Performance Review – Work Plan assessment and Comments and signatures'. The original version must be scanned and emailed to Human Resources via the following email address [workand.developmentplans@mackillop.org.au](mailto:workand.developmentplans@mackillop.org.au). A copy is given to the employee and the original hard copy retained by the Supervisor.

## 4.6 Setting Next Year's Work And Development Plan

When the Performance Management Cycle is complete, at a separate meeting, Supervisors and Employees set new goals for the new performance cycle. New Performance Plans are completed in the months of February and March each year.

Refer to the beginning of this procedure and repeat all steps until the conclusion of the performance cycle.

**REFERENCES****Managing Unsatisfactory Performance and Misconduct Procedure**

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## Attachments:

- HR-F-001 MacKillop's Performance Management System's 'how to' guide
- HR-F-002 Work and Development Plan
- HR-F-003 Supervision and Feedback Record
- HR-F-004 Supervision Summary Sheet

(Approved by the CEO 20/7/1998)

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