



## ALL SERVICES

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### PERFORMANCE AND DEVELOPMENT REVIEW PROCEDURE

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#### PURPOSE

The performance, planning development and review is designed to objectively communicate/ recognise individual performance/competencies/achievements/values regularly displayed by an employee. This is a two way process between an employee and their immediate supervisor designed to ensure competent, accountable performance according to the work role, continuing professional development and ongoing support.

It also forms a basis from which Key Result Areas can be set and training and development needs identified.

It enables the monitoring of key behaviours which reflect organisational values and desired culture, facilitates the development of a motivated workforce and promotes Wesley's reputation as a responsible organisation.

This process performs a very important role in improving service delivery and engaging and developing staff.

An annual performance review (the focus of this procedure) is only one element in the tools to support employee performance. Performance development is an ongoing process involving regular feedback, conversation and supervision. A formal supervision process is outlined in Supervision Procedure P&C P 31.

#### SCOPE

This procedure shall apply to all employees of Wesley Mission Victoria (Wesley). All staff are to undergo a Probation Review within 3 months of employment (unless a longer period is specified) or 6 months in the case of Managers to be completed on Form P&C F 54. An annual Performance and Development Review is to be completed for all staff between July and September each year P&C F 04.

#### POLICY

- Policy 4 Commitment to Employees
- Policy 8 Compliance

#### REFERENCES

- AS/NZS ISO 9001:2008
- Fair Work Act 2009
- Staff Induction Procedure P&C P 10
- Staff Training Procedure P&C P 20
- Position Description and Organisation Chart Procedure P&C P 28
- Supervision Procedure P&C P 31

#### DEFINITION

**Reviewer** – is the person who supervises most of an employee's work (direct line manager) and who undertakes the performance development and review with their employee. This could be a Team Leader, Coordinator, Manager, Executive Manager, General Manager or CEO.



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#### PROCEDURE

#### 1. General

##### 1.1 In implementing this Performance and Development Review procedure, the Reviewer shall:

- assist employees to understand their role and job accountabilities;
- provide employees with coaching and guidance in the performance of their role;
- provide employees with the opportunity to discuss any issues they face;
- work together with employees to resolve problems and issues faced;
- identify and address development needs;
- address any performance issue that may exist; and
- review the Position Description

##### 1.2 The People and Culture department will periodically provide training to ensure that managers and employees are trained in the skills to effectively participate in the performance review process as required by the organisation. Assistance may also be provided on an 'as requested' basis.

#### 2 Scheduling Performance and Development Reviews

##### 2.1 *All staff will participate in a Performance and Development review process between 1 July and 30 September each year. The Supervisor/manager will schedule all PDR's within this 3 month period.*

##### 2.2 The Reviewer shall ensure that:

- Performance reviews are to be scheduled for a time that meets program requirements.
- The scheduling of Performance and Development reviews should be discussed during supervision and notification given to the staff member. A copy of the Performance Development and Review Form P&C F 04 and this procedure should also be given to the staff member prior to the review occurring. The supervisor and staff member should complete the form as far as possible prior to their meeting.

#### 3 Preparing for Reviews

##### 3.1 The Reviewer shall transfer the following information onto a blank Performance and Development Review Form P&C F 04 (sections defined in Appendix A):

- Key Result Areas which may come from the employee's position description or work plan;
- other Key Result Areas not specifically identified in the position description that the employee has been required to achieve;
- any Key Result Areas from the previous year's appraisal meeting.

##### 3.2 Reviewers shall:



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- Send an email or a memo to each employee stating the appointment time and meeting location at least one week in advance;
- issue each employee with the Performance and Development Review form P&C F 04, listing Key Result Areas and competencies, and a copy of the procedure at least one week prior to the review appointment;
- organise an interview venue free from likely interruptions,
- allow an hour for the discussion

#### 4 Reviews

4.1 At the meeting the Reviewer and the staff member shall confer to:

- complete the Performance and Development Review Form P&C F 04 evaluation;
- discuss the achievement of the Key Result Areas for the previous year (if available);
- agree on and record Key Result Areas for the coming year (which will form part of their next year's review and can be discussed at supervision meetings);
- discuss training undertaken during the past year, and particularly the mandatory training and agree on the employee's development needs and how these will be addressed, completing Section 4 of the Performance and Development Review Form P&C F 04
- review the position description;
- identify or update Key Result Areas if appropriate;
- both sign the review form acknowledging their agreement with the recorded contents.

4.2 Both the Reviewer and the employee shall contact the reviewer's line manager to mediate any differences of opinion. A meeting to mediate any differences of opinion should occur with the outcome documented and filed with the review papers.

#### 5 After the Review

5.1 After the interview the Reviewer shall ensure that:

- the form is countersigned by their line manager;
- send a signed copy of the completed form to the staff member;
- send completed copies of the Performance & Development Review forms to People & Culture Department. The line area should retain a copy either electronically or in hard copy.

5.2 The People & Culture department shall:

- file completed review forms in the employee's personnel file; and
- record and report completion rates from each area to the Executive team.

#### 6 Rectifying Performance Issues



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Managers shall address individual staff training and development issues when they prepare their annual training plan and proposed training schedule. Where performance is evaluated below satisfactory in any areas, the reviewer and employee will agree on short term goals, in addition to the annual Key Result Areas, to raise the employee's performance to an acceptable level. If necessary the reviewer will seek assistance from the People & Culture Department.

#### **7 Disciplinary Action**

Managers and Executive Managers shall address performance issues promptly in accordance with Staff Discipline Procedure P&C P 15. Performance issues are not to be held over until Performance & Development Review meetings. Performance issues must be addressed in regular supervision or on an as required basis.

#### **8 Problems and Grievances**

Any problem or grievance that becomes apparent during the review process shall be recorded by the staff member identifying the problem or grievance, on a Grievance Form and actioned in accordance with Issue and Grievance Resolution Procedure P&C P 08.

#### **9 Records**

All records shall be maintained within the individual staff member's file and in accordance with the security, confidentiality, access and storage requirements detailed within QRC P 02 Document and Data Control Procedure and QRC P 05 Control of Records Procedure.

The People & Culture Department will maintain a data base that indicates the Performance & Development Reviews required and whether or not they have been conducted



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#### APPENDIX A – DEFINITIONS OF SECTIONS OF THE PERFORMANCE DEVELOPMENT & REVIEW FORM

##### SECTION 1 RATING GUIDE

The form uses a 4 point scale for all goals contained in the Performance and Development Review Plan. Expectations relating to these ratings should be discussed at the goal setting stage to ensure the staff member is clear on expectations.

Both the reviewer and the staff member should have considered their ratings in advance of the meeting. It enables the staff member to think critically about the key elements of their job and their performance and to help make the discussions more productive and helpful. Comments should include reference to specific work examples to substantiate outcomes/performance achieved. Ratings should then be discussed and agreed upon during the review conversation.

Rating	Descriptor	Definition
<b>U</b>	<b>Unsatisfactory</b>	<ul style="list-style-type: none"> <li>Did not achieve the objective or meet target within the specified time frame</li> <li>Performance is well below expected standards and role requirements (e.g poor quality, incomplete tasks)</li> <li>Time management poor / work is usually not completed on time</li> <li>Work needs to be regularly supervised</li> <li>Did not apply countermeasures when it was reasonable to do so</li> <li>Accuracy of work is not consistent and errors occur regularly</li> <li>Avoids taking on extra responsibility (where possible)</li> </ul>
<b>I</b>	<b>Needs Improvement</b>	<ul style="list-style-type: none"> <li>Partial achievement of objectives</li> <li>Not meeting all targets/expectations within specified timeframes</li> <li>Some shortcomings are evident, with need to focus on specific improvement</li> <li>Accuracy and quality of work requires some supervision to minimise errors and achieve required standard</li> <li>Did not always successfully apply countermeasures to ensure performance was on track</li> </ul>
<b>M</b>	<b>Meets Expectations</b>	<ul style="list-style-type: none"> <li>Achieves objectives to an acceptable standard</li> <li>Completion of targets within specified time frames</li> <li>Accuracy and quality of work is of an acceptable standard</li> <li>Readily identifies issues requiring attention, recommending options and implementing solutions</li> <li>Accepts new responsibilities when requested</li> <li>Adopts a professional attitude in dealing with people across the organisation in most situations</li> </ul>
<b>E</b>	<b>Exceeds Expectations</b>	<ul style="list-style-type: none"> <li>Exceeds expectations in achieving objective/achieves results well in excess of targets</li> <li>Accuracy and quality of work produced is of a consistently exceptional standard</li> <li>Consistently identifies issues requiring attention as well as recommending and implementing highly effective solutions</li> <li>Leadership ability is demonstrated by taking control of pressure situations and/or by taking on new challenges and additional responsibilities</li> <li>Maintains a professional attitude at all times in dealing with people across the organisation</li> </ul>



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#### **SECTION 2     Demonstrating Organisational Behaviours**

Assess the extent to which the employee's behaviours and actions have reflected the Wesley Values. The rating scale for this section is Demonstrated or Needs Improvement.

#### **SECTION 3     Individual Development Plan**

*Development Need or Objective* – these should be identified from the discussions in Section 1 and Section 2, assessing work performance and demonstrating skills, competencies and workplace behaviours.

*Development Action* – these are the specific programs and initiatives that can be used to address the skills/competency gaps to support the staff member. These actions should be both reasonable and realistic. They are genuine commitments agreed to achieve the development objective/need. Ideally, the development program should be spread over 12 months to assist with workforce planning and budgetary requirements.

There are a variety of development options that may be considered – offsite training program, onsite training, onsite mentoring, offsite coaching, online training, shadowing a colleague in same work area, shadowing a colleague in another work location/team, guest speakers at team meetings, etc.

#### **SECTION 4     Career Planning & Development**

An opportunity to discuss longer term goals and to review areas the employee finds satisfying and areas that could be improved.