Agreeing performance expectations

Setting and agreeing performance expectations is fundamental to good job performance, satisfaction and development. Providing staff members with clarity of purpose contributes to longer-term employee engagement and commitment.

Tips

Use the **position description** as the basis for working through and agreeing with the staff member their role's requirements and expectations. A position description that incorporates the job level's capability requirements from the **Workforce Capability Framework** provides a foundation for discussions and contributes continuity and consistency to the process.

Ensure conversations about performance requirements are consistent with the job level at which the role has been graded. Use the appropriate job level requirements from the Workforce Capability Framework as a guide.

e.g.

For example, based on the framework content for a level 3 role, a discussion on the capability area of leadership/ teamwork would concern the staff member organising their own workload with minimal supervision, working collaboratively with teammates, providing guidance to less experienced staff, and sharing knowledge with others.

Focus on the requirements of the role rather than the detail of the tasks. This ensures that the required capabilities on which performance measures will be based are not lost or overlooked in a task-based approach.

This is not to say that task instruction and feedback and discussing detailed job requirements is an unimportant part of the day-to-day interaction between a manager or supervisor and staff member. However, these interactions should not be confused with the specific aim of building understanding and reaching agreement on performance expectations.

e.g.

For example, a manager or supervisor wanting to provide guidance on and agree performance expectations for a level 3 role in the capability area of reporting, documentation and administration would focus on when and where reports are to be documented, and at what standard, rather than on the detailed procedures of the computer-based client record system.
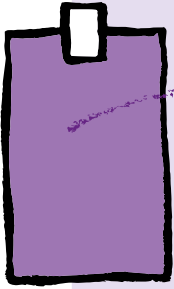
Tips

Instruction for a staff member on how to use the computer system is a separate exercise involving training, task instruction and so on.

Plan a series of discussions to reach agreement – brief, focused discussions are better than protracted meetings. This allows both parties to reflect on the role and its requirements, including the expectations of customers, interaction with other roles, resources required, etc. These discussions can easily be managed by phone, Skype, etc., particularly where the supervisor is not co-located with the staff member. The outcome of the discussions is the performance measures that will be incorporated in the position description.

Use the opportunity to engage with the staff member. It is much better to discuss and develop buy-in to agreed performance requirements in a role than to hand over a completed document and simply check if there are any questions. Although a series of focused discussions takes longer, this investment of time by both parties will pay off. You want to create an environment where the staff member can and wants to commit to what's been discussed and agreed.

Include in new staff induction enough time for discussions on job goals and performance, as well as the traditional sector and organisation orientation.

Look at the Workforce Capability Framework together to facilitate discussions and questions about the role and its context.

Discussing the content of the framework at the relevant job level is a non-threatening approach that encourages early exchanges of expectations. This is a natural two-way process rather than just a flow of information to the staff member. A position description that incorporates the job-level capability requirements is a useful bridge between the capabilities expected to be demonstrated and the more specific performance expectations to be developed and discussed.
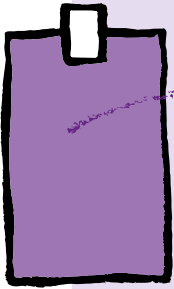
Tips

e.g.

Use the Workforce Capability Framework content as a basis when drafting the description of work in the staff member's documented performance measures. Often the manager or supervisor knows what general content and focus need to be there, but the framework contains specific points to use. This is a great time-saver for managers and supervisors.

For example, for the level 3 strategic core requirement of innovation, one of the capabilities listed is to be 'able to address and mitigate risk in own work'. This can be discussed by the manager or supervisor and the staff member in the context of the job responsibilities and may result in some performance measures along the lines of:

* *identifies risks and possible solutions for immediate work problems that arise in the role*
* *corrects problems and escalates more complex problems to team leader.*

This is a concrete means of future assessment that is more specific than the capability statement.

Work hard to align the agreed performance measures with the capability requirements for the job level. This is critical to achieving the required role performance. Performance measures that are general and not applied in the context of the capabilities required of the job level can be vague or open to interpretation, and at worst, may make no sense or even be unachievable. Just as importantly, if the required performance measures for a role are not consistent with the job level at which the role has been graded, neither the staff member nor the organisation will be getting value for money from the role.

A manager or supervisor doesn't need to draft performance measures from scratch every time; consider using performance measures from other roles or other teams within the organisation. It is normal for the performance measures of similar roles or roles in the same team to have some consistency, particular for the capability areas covered by the strategic core requirements.

Cross-check performance measures and deliverables discussed between the manager or supervisor and the staff member against the relevant content in the Workforce Capability Framework to ensure alignment with the capabilities and requirements of roles at that job level.
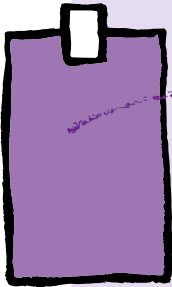
Tips

Ensure that discussions are properly completed and that a sign-off point is reached for both the staff member and the manager or supervisor. This is also critical to ensuring buy-in. The agreement from a performance discussion must be concluded even if requirements or performance measures need to be revisited in the future.

Complete a record of the agreed performance expectations for a role. Generally, both the manager or supervisor and the staff member will sign a paper copy of the agreed document, a usual step in meeting organisational documentation requirements. Sometimes records are maintained online. Record-keeping policy will vary from organisation to organisation – the staff member and the manager or supervisor will want a copy, as may HR or another central administrative record-keeping function.

Information from the documented agreement and the discussion should tell you more about the aspects of the job that are important to the staff member. They can add any new information to their **one-page profile**.

Regularly revisit performance expectations and written performance measures with staff members who have been doing the same job for many years, even if there do not appear to be many job changes. This is a good way for managers and supervisors to prevent 'drift' of the performance expectations held by long-term staff about their role and what customers and the organisation requires of them.

Similarly, feedback appropriately sought from the staff member's internal and external customers can be used in support of the review and revision of performance measures. This will ensure the customer is receiving the agreed service. This could include seeking regular feedback from an individual at intervals to coincide with performance review processes.
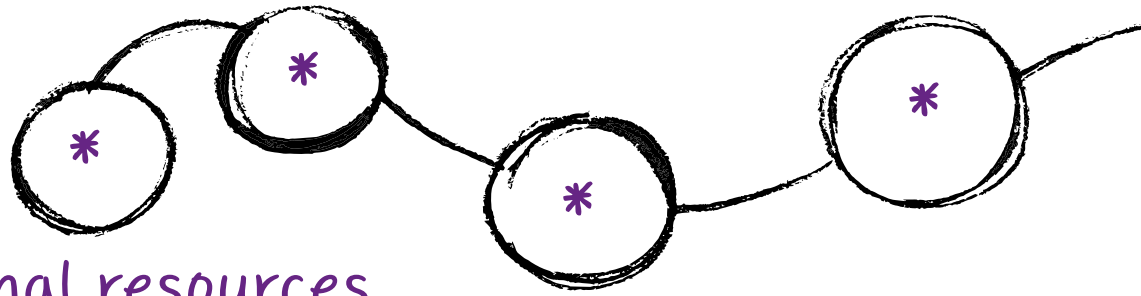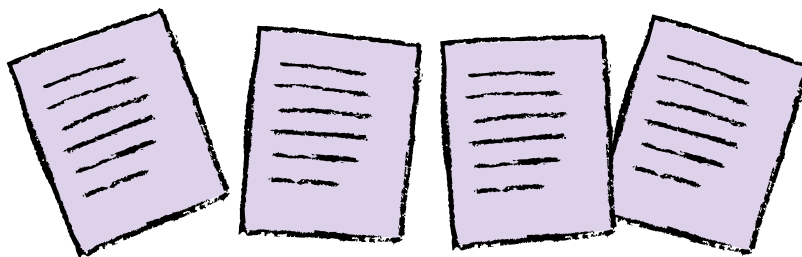
Additional resources

* The Workforce Capability Framework
* The disability career planner and capability framework implementation guide
* The Disability Career Planner http://www.carecareers.com.au/career-planner
* Technique, tips and template – writing position descriptions
* Tips – building on a one-page profile through performance planning, support and supervision
* Template – performance review

Definitions

The term **individual(s**) refers to an individual with a disability and their family and/or circle of support.

The terms **staff/employee(s)** refer to paid or unpaid members of the workforce regardless of their employment relationship with their employer i.e. permanent, casual, full-time, volunteer, etc.