

Performance management

Performance Review

Having a documented set of performance expectations agreed between the staff member and the manager or supervisor provides a sound basis for discussing the staff member's achievements in the role and areas for development.

The performance review template links the capability requirements and performance expectations in a role and ensures a consistent approach to conducting performance review discussions.



Tips

Preparation for the performance review

These steps assume that Key Performance Measures (also known as key performance indicators or KPIs) have been previously agreed between the manager or supervisor and the staff member for the review period.

A manager or supervisor and the staff member will get the most value from the performance review discussion if they are both well prepared. Each can consider the following questions in preparation for using this tool in the review discussion:

Staff member

- * How are you going at work?
- * What are your strengths?
- * What have been your key achievements during the review period?
- * What needs to be done differently?
- * What learnings have you taken from your experiences in the role over the review period?

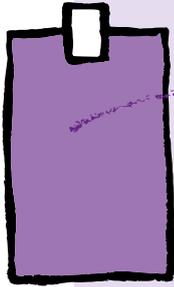
Remember to

- * Prepare in advance by thinking about your work over the review period.
- * Try and think of specific work examples that demonstrate both achievement, and any areas for development.

Manager or supervisor

- * Have you scheduled the review meeting well in advance to allow enough time for both of you and your staff member to prepare?
- * Have you reviewed your progress notes from the review period in preparation for your discussion with the staff member?

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Tips

- * What key points would you like to capture with regard to the staff member's achievements?
- * Is the staff member meeting the capabilities/requirements for the role?
- * What other areas arose during supervision that are relevant to the review discussion?

Remember to

- * Only undertake a performance review as the direct supervisor.
- * Schedule the review meeting well in advance to allow preparation.



Tips

Assessment

Managers or supervisors generally prefer to review the staff member's performance against the specific expectations/ performance measures agreed for the role and then determine an overall assessment for each **key responsibility area**. These assessments provide the basis for the overall performance review outcome.

A five-step approach to assessment can be used - e.g. Outstanding (5), Superior (4), Fully Competent (3), Improving (2), or Marginal (1) - which allows the manager or supervisor and the staff member to exercise judgement on differing levels of performance that has been demonstrated across the range of job responsibilities. It also allows the manager or supervisor to assess and provided feedback on differing levels of performance more fairly across the team.

Some organisations have specific procedures to follow, including for rating different standards of performance, in their organisational policy statements on performance reviews.

Remember to

- * Balance feedback on poor performance in a particular aspect of the job with feedback about things that have gone well.
- * Use work examples from the review period that substantiate the performance that has been achieved (records kept from supervision discussions and other reviews/assessments during the period will assist).

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Tips

Preparation for development planning

The manager or supervisor and the staff member can consider the following questions in preparation for the development planning component of the review discussion.

Staff member

- * What support, learning, development, etc. do you want/ need to meet the requirements of your role?
- * What are your career development goals?

Remember to

- * Focus primarily on the learning and development you need to build your skills to meet the requirements of your job.

Manager or supervisor

What are the priority areas for learning for the staff member based on their performance in the role?

Is there a career development pathway that meets the staff members' interests and can be supported?

Remember to

- * Focus primarily on the development required to build the staff member's capabilities to meet the requirements of their current job.



Tips

Finalising the review

Many managers and supervisors will conduct all their reviews with team members before finalising their comments and the overall performance review outcome for each staff member.

Remember to

- * Follow-up after the review discussion by completing documentation requirements for the review.

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Name of staff member

Date of commencement in role

Position Title

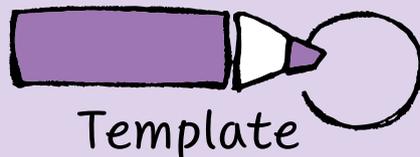
Job Family

Job Level

Reports to

Date of review

Name of reviewer:



Template

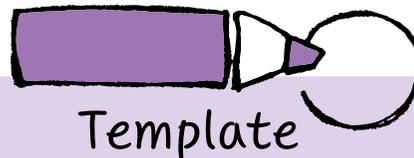
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Key responsibility areas: strategic core requirements
Sector and organisation purpose and values

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources

Leadership/teamwork

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources



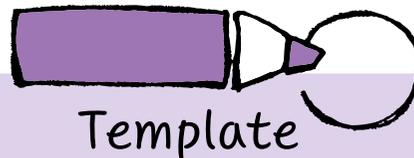
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Communication

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources

Customer relationships

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources



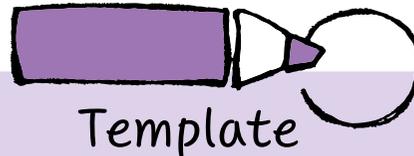
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Personal accountability

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources

Innovation

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources



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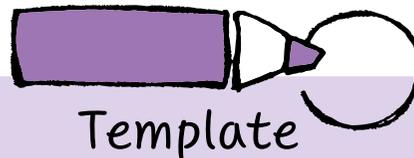
Key responsibility areas: functional requirements

Functional requirement area 1

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources

Functional requirement area 2

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources



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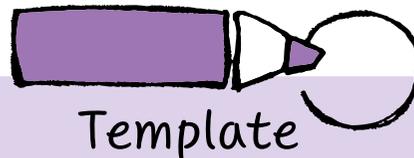
Key responsibility areas: functional requirements

Functional requirement area 3

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources

Functional requirement area 4

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources



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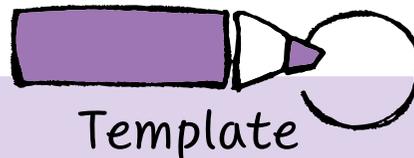
Key responsibility areas: functional requirements

Functional requirement area 5

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources

Functional requirement area 6

Capability requirements	Key performance measures	Staff member assessment	Manager/supervisor assessment	Development plan activities/resources



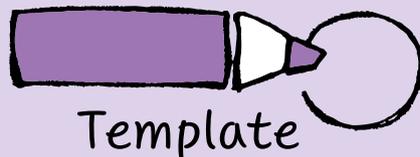
Performance review

Summary of performance review

Overall performance review outcome is

Staff member's comments

Manager/supervisor's comments



Template

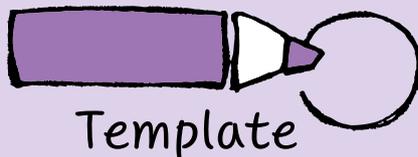
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Summary of development planning

Priority development areas are

Staff member's comments

Manager/supervisor's comments



Template

Performance review

Career development (if applicable)

Career development activity will focus on

Staff member's comments

Manager/supervisor's comments

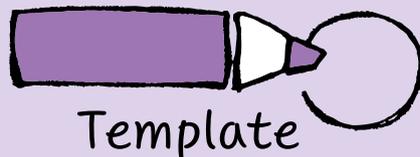
Signatures

Staff member

Date

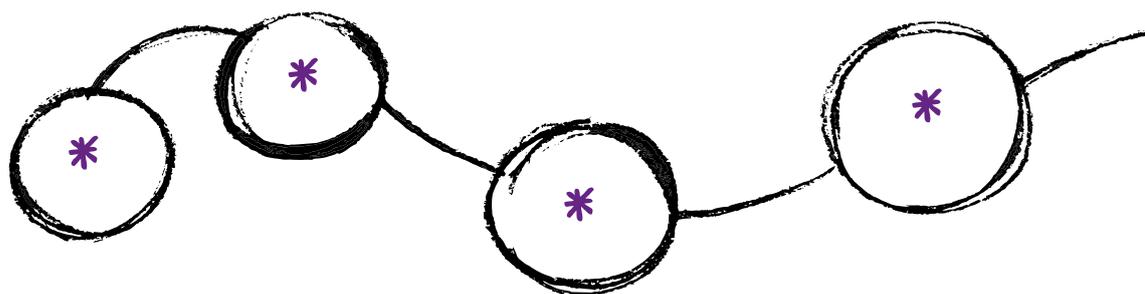
Manager/supervisor

Date



Template

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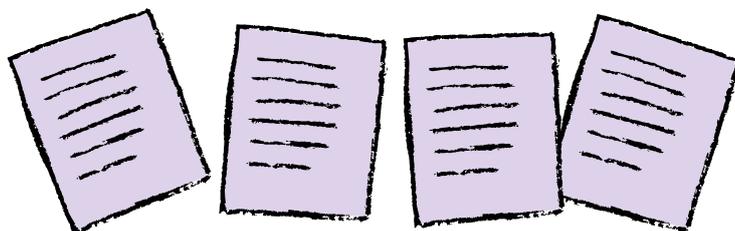
Additional resources

- * The Workforce Capability Framework
- * The disability career planner and capability framework implementation guide
- * The Disability Career Planner
- * Tips – agreeing performance expectations
- * Tips – preparing for and conducting performance review discussions
- * Tips – development planning with individuals

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.



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