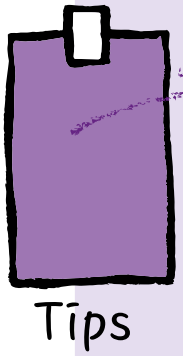
Performance management

Development planning for teams and organisations

Disability organisations make significant investments in training and development. It is important that these investment decisions are based on clear evidence of workforce development needs and priorities. They should also be aligned to the organisation's strategy and needs and the requirements of the individuals supported by the service. This evidence needs to be collected and understood in a consistent way.

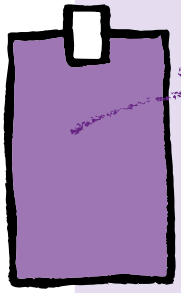


Use the **Workforce Capability Framework** as the foundation for effective team or organisation-level decisions on training and development priorities. Good decision-making comes through ensuring that priorities for, and investment in, learning and development will build capabilities to deliver what the organisation requires, now and into the future.

Consolidate the development planning discussions held with individual staff members to build a picture of the overall development needs at team or organisation level. The Workforce Capability Framework enables comparison of the needs assessed, or plans made. This is because the framework uses consistent language, e.g. **leadership and teamwork, communication, innovation**, in the **strategic core requirements**, and a standardised approach to the range of job levels, e.g. a development plan for a **level 3 direct service delivery** role can be compared with a plan for a **level 3 corporate services** role, even though the day-to-day responsibilities of the job holders will be different.

Ensure that plans made for development are in the context of the role's capability requirements in the team or the organisation. There is no point in prioritising development needs that have been determined when there is uncertainty about roles, poor job design, or inadequate position description documentation. It is important to get clear job definition and documentation in place and designed to meet the organisation's goals before proceeding to base development decisions on the job requirements of staff members, teams or the organisation.

Performance management



Consider the results of the organisation-wide development planning activity from a number of different perspectives, job level, job family, team, function, service, etc. It may be that results are significant on a team-by-team basis – for example, the direct service team may require development in responding to customer feedback. It may also be that out of all the level 4 roles in the organisation, 75% were evaluated as needing further development to meet the required level of capability in **customer relationships**, as defined for **level 4** in the Workforce Capability Framework. This may result in a decision to target training or on-the-job mentoring at the level 4 staff cohort before, or in conjunction with, the time and money to be spent in development for the direct service team.

Use the results of organisation processes that identify development needs and priorities to flow through to individual planning by managers or supervisors and their staff members. This will help decide on priorities for individual capability development and skills training.

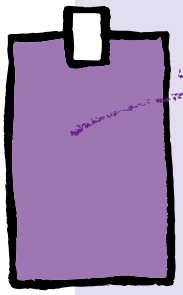
Consider conducting a separate process if it is necessary to determine development needs and priorities at a different time of year from when full individual performance reviews and development plan results are available for the team or organisation.

Use a variety of alternative processes in determining your organisation's current skill levels and development needs. This may include:

* Conducting a training needs analysis (where HR and training and development professionals gather information in terms of the skills and/or training and development needs required via internal interviews, surveys, etc.).
* Through self-assessments (where staff members conduct their own assessments).
* Via manager's reviews (what do managers think about the current skills and development needs of the staff members).
* Through customer feedback surveys (what do the customers think about the skills of staff) etc.
* A combination of the above.

Ideally, managers or supervisors, staff members and customers are able to contribute their perspectives in some way.

Performance management



Tips

e.g.

Always base alternative development needs assessments on the relevant capability levels in the Workforce Capability Framework, even if position descriptions are not in place or performance reviews are not being consistently carried out across the organisation.

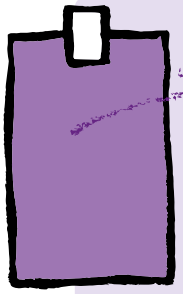
For example, an organisation could use the Workforce Capability Framework as the basis to survey managers. They would be asked to rate the effectiveness of their teams (for example, using a 5-point scale of low skilled to highly skilled) against the capabilities in the strategic core requirements areas for the relevant job levels represented in their teams.

This would build an organisational picture of priority areas for training and development investment in the eyes of managers, without needing to wait for position descriptions to be updated or performance reviews to be conducted. While general opinions could be more easily sought from managers, the importance of using the framework is that all the managers are basing their views on a consistent picture of workforce capabilities. This adds significant validity to the results of the process.

Consider using a sampling technique in the case of an organisation-wide assessment of development needs and priorities. A random selection of staff from relevant teams across the organisation can be used, ensuring sufficient coverage of staff and roles on which decisions can be based. For example, if the development of team leaders in an organisation is under consideration, ensure the sampling includes sufficient team leader roles from all relevant work areas.

A sampling approach will save time and resources for managers or supervisors and staff members in the organisation while still providing an effective overview of priority areas for development. The Workforce Capability Framework outlines the capability requirements at different job levels with which development activities for all roles across the organisation can be aligned, whether included in the sampling technique or not.

Performance management



Tips

e.g.

If the '**what's working/not working**' tool has been used across the organisation as part of an improvement process, try comparing the top 2 or 3 'not working' areas with the results from an alternative development needs assessment approach. This will highlight areas of strength and weakness in terms of performance/capabilities in different parts of the organisation, or the organisation as a whole. It will also aid the understanding of, and decision-making about, common capability gaps that need investment in development.

For example, the use of the 'what's working/not working' tool may have identified poor communication between different teams in the organisation as a commonly held view across the organisation.

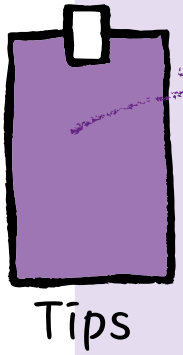
A separate needs analysis may have been conducted by a learning and development professional using the Workforce Capability Framework as the basis. The analysis, perhaps using a survey of managers and staff, may have identified the **strategic core requirement** areas of **leadership/teamwork** and **communication** as two areas requiring organisational investment.

The needs in this area were seen to be higher than in other areas, e.g. sector and organisation purpose & values, customer relationships, personal accountability, innovation. The capability areas of leadership/teamwork and communication are multi-faceted but include a clear emphasis on communication and teamwork between teams across the organisation.

The results from the two processes – 'what's working/not working' and the 'development needs analysis' – show similar results. This aids confidence and decision-making about investing in development in the identified areas.

The framework describes the relevant leadership/teamwork and communication capabilities at each job level and can form the basis for specific development interventions and improvement strategies that may be required in the organisation. The development interventions proposed may be quite different at senior manager level to team leader level, because the capabilities are also different.

Performance management

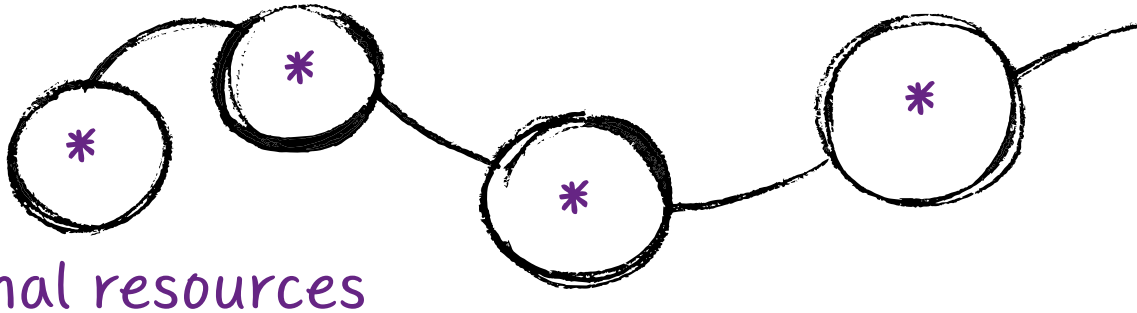


Beyond development planning, use these methods of analysis and prioritising (i.e. needs analysis, self-assessment, customer feedback, etc.) to understand and make decisions about the current skills profile of teams or the organisation.

The Workforce Capability Framework provides for the collection and analysis of skills data in a consistent and sound way. The outputs can be relevant to planning and decision-making about services and resourcing of operational planning, and for longer-term needs, about strategic planning. Understanding the skills profile of a team or organisation is particularly relevant for teams and organisations in transition in terms of services offered and traditional staff profiles.

If the goal is to build a longer-term picture of jobs and staff skills, e.g. in the context of a workforce planning exercise, use the Workforce Capability Framework to ensure consistent decisions are made about the proposed job level of future roles. The likely skills profile required at these job levels can then be considered, and plans made for recruitment or staffing practices to support the future environment.

Using the framework will deliver a consistent and repeatable approach to evaluating future capability needs and support better decision-making. Various options for future staffing can be looked at – for example, different proposed skills profiles could be evaluated to determine differences in cost, staffing/recruitment challenges, alignment with anticipated customer expectations and requirements, and so on.



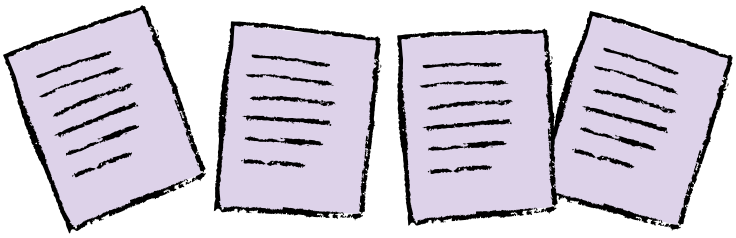
Additional resources

* The Workforce Capability Framework
* The disability career planner and capability framework implementation guide
* Tips – development planning for individual employees
* Technique, tips and template – writing position descriptions
* Tips – using 'what's working/not working' in performance planning, support and supervision

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.



Intellectual property rights are jointly owned by National Disability Services Ltd, PeopleAdvantage Pty Ltd and Helen Sanderson Associates respectively. ©This publication is copyright. All rights reserved.