

## Form – Executive Assistant Senior Human Resources Administrator – Performance Review Template

**Step 1: Plan** – Reviews to be completed by the end of the first week of October Yearly

1. Plan the review by according to your business goals for the year ahead. Think about how the employee’s work performance will help your business reach these goals. You should consider:
  - what tasks the job involves
  - what skills and abilities are needed to do the job?
  - what level of performance is expected?
2. Book a Review meeting with each employee
3. Email each employee a copy of their position description, and Performance Review for return (with employee comments) before the meeting.

**Step 2: Review**

1. Meet with each employee every 12 months to assess their performance against the agreed goals.
2. During the meeting, talk with the employee about:
  - how they have been performing
  - the skills they need to develop
  - their own ideas about learning and development opportunities
  - for casual staff - provide a copy of the Fairwork casual statement  
[www.fairwork.gov.au/sites/default/files/migration/724/casual-employment-information-statement.pdf](http://www.fairwork.gov.au/sites/default/files/migration/724/casual-employment-information-statement.pdf)
3. Document any actions required in the comments section with a follow up date.
4. Consider whether you need to revise their performance goals or set new ones for the next cycle.

**Good practice four-point rating scale** - To be used by Manger for evaluating performance goals

Use this 1-4 rating scale to rate each criteria with comments in the review document.

Four-point rating scale	Definition
1. Does not meet expectations	The employee consistently fails to meet agreed expectations
2. Meets most expectations	The employee meets most agreed expectations
3. Meets all expectations	The employee meets all agreed expectations
4. Exceeds expectations	The employee always meets and sometimes exceeds agreed expectations

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### Performance Review and Development Plan

Employee Details			
Employee name:		Position:	
Commencement date:		Department:	
Performance Period			
Annual Review Date:			

### Acknowledgement of Review *To be signed off by Employee and Manager after review*

Agreement – Planning & Annual Review					
Employee Name:		Signature		Date:	
Manager Name:		Signature		Date:	

Employee Survey	
Have you reviewed your position description? Please circle and add any comments	Yes/No
Do you have any feedback on the Headway communications (e.g., newsletter, website, internal communications)?	
Are there any areas of training you would like to see across Headway (e.g., staff meetings, training days)?	

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**Performance goals** *Employee to enter comments, then Manager to enter a rating and comment*

Task / Responsibility	Required outcomes	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments	Rating scale 1-4
Senior Administration/ Leadership	1.Ensure the effective onboarding and induction of all new administration staff with accurate paperwork and record keeping 2.Manage and supervise administration procedures in QMS and CRM. 3.Provision of a wide range of administrative support across the organisation.			
Business Support	1.Ensure the effective onboarding and induction of all new administration staff with accurate paperwork and record keeping 2.Manage and supervise administration procedures in QMS and CRM. 3.Provision of a wide range of administrative support across the organisation.			
Human Resources Management	1.Demonstrate effective management and processing of HR administration tasks.			

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	<p>2.Ensure clear, concise and accurate record keeping and correspondence, both incoming and outgoing.</p> <p>3.Effective management of the CRM, ensuring information is accurate, timely and relevant.</p>			
Client contact	<p>1.Demonstrate effective stakeholder management with both internal and external customers.</p> <p>2.Ensure the organisation is represented professionally at all levels of client contact.</p> <p>3.Ensure appointments for clients and staff are scheduled proficiently and accurately</p>			

### Learning / Development / Training Plan Areas to be marked N/A if not required.

Areas for learning/development skills and behaviors the employee could improve	Actions <i>List agreed strategies to achieve the learning/development</i>	Annual Review Progress Employee Comments	Annual Review Progress Manger Comments
Areas for training skills and behaviors the employee could have formal training in	Actions <i>List agreed strategies to achieve the development</i>	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments

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<b>Overall comments</b>	
Employee overall comments:	
Manager overall comments:	

<b>Review discussion notes</b>	<b>Date Due</b>
Any other discussion points to be recorded or followed up:	