

Form – OHS/Quality Coordinator – 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
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
Occupational Health & Safety	1.Demonstrate sound knowledge in OHS legislation and practices, ensuring best practices guidelines are in place and adhered to by all employees. 2.Ensure incidents are responded to proficiently and within the guidelines set out. 3.Effectively liaise with key personnel within Headway and external parties to properly inform the OHS functions of the organisation. 4.Ensure processes are in place for a thorough process for all OHS incidents and investigations. 5.Ensure regular and high-quality reporting regarding risks, improvements and actions / support / recommendations / resolutions and outcomes 6.Proactively communicate, identify, report, assess OHS related risks and hazards within the centre(s).			
Quality Assurance	1.Ensure a thorough schedule is built for NDIS compliance in readiness for audits. 2.Update, edit and maintain our quality systems, including policies and procedures 3.Actively consult with management regarding audit readiness and response in a timely, organised and proactive manner 4.Perform a wide range of administration duties including document and standards review, preferably in the context of previous exposure to the NDIS and disability industry 5.Extensive stakeholder management both internally with regard to policy update and procedure development, as well as			

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	externally, actively consulting with relevant bodies to maintain our professional standing and compliance in our QMS			
Administration Leadership	<p>1.Onboarding and induction of new staff in relation to OHS and quality standards / policy specifically in a NDIS context and in our business</p> <p>2.Liaison with management and employees regarding OHS and Quality protocols, ensuring understanding and adherence.</p>			
Client contact/ Customer service	<p>1.Effectively manage face to face and telephone client contact and relay accurate content to our CRM system and client files, escalating priority/urgent items to Management and CEO</p> <p>2.Effective external liaison for best outcome for participant and staff safety</p> <p>3.Demonstrate awareness and understanding of administrative standards as well as applicable policies and procedures including references to the NDIS, confidentiality and client rights</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 Manager 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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Overall comments	
Employee overall comments:	
Manager overall comments:	

Review discussion notes	Date Due
Any other discussion points to be recorded or followed up:	