

Form – Plan Manager (Team Lead) – 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
Specialist functions and Leadership	1. Onboarding and induction of new plan management staff ensuring a thorough and effective process. 2. Ongoing management and supervision of accurate, thorough and efficient administration of plan management services by the plan management team 3. Effective liaison with management and staff in relation to plan management.			
Plan Management (including financial administration)	1. Ensure accurate and proficient financial administration processes are in place, adhering to the NDIS guidelines. 2. Ensure a transparent process for clients in relation to their financial management. 3. Effective liaison with the finance team to ensure an effective process. 4. Provide support and coaching to plan managed participants to understand plans and ensure services are aligned with NDIA goals 5. Lead the design and development of policies and procedures for the plan management team.			

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Client Contact	<p>1. Effectively communicate with clients to ensure thorough understanding of their plans and aligned services.</p> <p>2. Ensure an efficient, welcoming point of contact for actual and potential clients, carers and related parties and effectively manage all client liaison.</p> <p>3. Demonstrate effective liaison with external and internal stakeholders, representing Headway professionally at all times.</p> <p>4. Coordinate thorough, timely and accurate management of client data in our CRM</p>			
General Administration	<p>1. Ensure accurate, thorough and clear records and details are entered and maintained.</p> <p>2. Effective administration of CRM management for all client related data/enquiries, as well as any other associated software or systems related to our client data as appropriate</p> <p>3. Adhere to and implement administrative standards as well as applicable policies and procedures including references to the NDIA rules, NDIS, confidentiality and client rights</p>			

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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

Overall comments	
Employee overall comments:	
Manager overall comments:	

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