

Form – Senior Support 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
Specialist functions and leadership	1. Onboarding and induction of new support coordination staff in all manner of document generation/correspondence, records management, client contact protocols and system usage. This may include participation in recruitment and probationary/performance management or reviews 2. Ongoing management and supervision of accurate, thorough and efficient administration of support coordination services by the team 3. Wide ranging supports relating to these functions, including; liaison with management and CEO, auditing or standards control, reporting (monthly and ad hoc) as well as support and supervision of support coordinators across our business			
Support Coordination Activities 85% of working hours are billable support coord, 15%	1. Monitor NDIS plans/funding to ensure participants plans are reflective of needs, relevant funding available and is utilised effectively 2. Effective linkage and referral to services needed by client to			

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<p>Admin / leave etc, and reflect client allocated/ approved hours in their plan</p>	<p>achieve their goals set out in the NDIS plan 3.Achieve 85% of equivalent hours as billable works via Supportability for each participants each month, consistent with your participants plans 4.Assist other Support Coordinators in the sharing of resources and contacts to support their learning with your experience 5.As requested, support the Manager with training of new staff 6.Identify opportunities for efficiency, improvement or value adding to the coordination of client supports</p>			
<p>Client Contact</p>	<p>1.Implement a plan for a minimum monthly in person or direct contact (where preferred) with your clients 2.Demonstrate consistent contact and care with clients in proportion to their plan allocation</p>			
<p>Administration 1 hour (15%) of work time is for admin and non billed activities</p>	<p>1.All Journal Notes to be entered consistently within 48 hours or next business day 2.Journal notes are created to the standard detailed in the guide 3.Sign up packs - When conducting sign ups, Support Coords are to ensure these packs are complete and thorough before services commence unless otherwise approved by Management.</p>			

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	<p>This includes but is not limited to; Onboarding checklist, administration of documents, service agreements, schedules of supports, support coordination agreement, consent and conflict of interest</p> <p>*NB: As per procedure aligned documents to be uploaded to CRM within 2 weeks of distribution or notes added regarding follow up or verbal consent</p> <p>4.Emails - Aim to allocate 15% of each day for administration including email correspondence, ideally with a 48-hour response period unless marked urgent (to be responded to by next business day/within 24 hours)</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 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:	