

LSO Performance Review template

Explanatory information is shown in *blue italics* to assist you

Step 1: Plan

Plan the review by looking at 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.

Book a Review meeting with each employee and email each employee a copy of the Performance Review for return (with employee comments) before the meeting.

Step 2: Review

Meet with each employee every 12 months to assess their performance against the agreed goals.

During the meeting, talk with the employee about:

- how they have been performing
- the skills they needs 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

After you've completed the review of the current performance cycle, consider whether you need to revise their performance goals or set new ones for the next cycle.

NOTE: LSO Performance Review and Development Plan will have 1 annual meeting:

1. Review at each 12 months – ANNUAL REVIEW

Good practice four-point rating scale

To be used by Manger for 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

Form – Employee – Performance Review and Development

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	
What is your current availability?	
What would your ideal hours per week be?	
Do you have any feedback on the Headway Newsletter?	
Do you have any feedback on the Brevity Newsfeed?	
Are there any areas of training you would like to see across Headway?	

Overall comments	
Employee overall comments:	
Manager overall comments:	

Form – Employee – Performance Review and Development

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

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
Participant centred care Provide a positive and supportive environment for participants to reach their full potential and attain their goals.	1. Receive positive feedback from participants and families 2. Complete all tasks each shift			
General Administration Complete accurate file notes, incident reporting, log books, communication books, and employee compliance documents. Maintain confidentiality and participants rights.	1. Complete all administration for shifts 2. Ensure all employee compliance documents up to date. <i>NOTE: Hold will be placed if not completed</i>			

Form – Employee – Performance Review and Development

Policies, processes and procedures Model the organisation's values. Adhere to Headway Gippsland organisational policies, processes and procedures.	1. Read and acknowledge all Headway correspondence (Emails, sms, newsletters, newsfeeds)			
Continuous Improvement Commitment to attendance/ participation in Headway training and team development. Commitment to Personal development.	1. Attend and participate in organisation provided meetings and training 2. Complete organisational online training			

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

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