

SD - Performance & development plan review procedure

Purpose:

Headway Gippsland's Performance Development Program is our opportunity to plan, develop and review the performance, behaviour standards and development of our people and our business. This is our collective and individual opportunity to provide and receive feedback, directly inputting into future training, career progression and operational budgets better than ever before.

Performance plan and development plans will have objectives and goals that are SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) and are attainable within a certain time frame. Both the employee and manager share accountability for the achievement of these objectives and goals in the period.

The Performance Development Plan will be used as a reference tool throughout the year and be treated as a dynamic agreement that can be adapted to changing environments and situations as appropriate.

Procedure:

Reviews to be completed bi-annually.

1. Manager to plan the review according to 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 (to be returned with employee comments before the meeting)
4. 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

5. 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
6. Good practice four-point rating scale - To be used by Manger for evaluating performance goals and to rate each criterion with comments in the review document.

Good practice four-point rating scale

7. Four-point rating scale	8. Definition
9. 1. Does not meet expectations	10. The employee consistently fails to meet agreed expectations
11.2. Meets most expectations	12. The employee meets most agreed expectations
13.3. Meets all expectations	14. The employee meets all agreed expectations
15.4. Exceeds expectations	16. The employee always meets and sometimes exceeds agreed expectations

17. Document any actions required in the comments section with a follow up date. Discuss and document the requirement of the role. Any amendment or review of your performance plans during the performance period should also be recorded, providing reasons for any stated changes to the plan. (NB: Any informal discussions do not need to be recorded in this form).
18. Consider whether you need to revise their performance goals or set new ones for the next cycle.
19. Email the completed and signed Performance & development plan to HR for uploading to the employee file in the CRM
20. The CEO, Finance manager and board will review the evaluations at the end of each year and determine any appropriate salary adjustments