

Step 1: Develop annual work plan

Scoping: An initial meeting between each staff member and their supervisor/manager is held to discuss the work program for year ahead, covering:

- ongoing activities and tasks
- planned new initiatives

Development of work plan: Following the meeting, staff members prepare their draft work plan (use the work plan and reporting format provided below).

Finalisation of work plan: A second meeting is held between the staff member and supervisor/manager to finalise the work plan, agree on timeframes for the completion of activities and, where relevant, set indicators of adequate performance for particular activities.

Step 2: Identify any skill development needs

At or after the finalisation of the work plan, the staff member and their supervisor/manager:

- Review the agreed work plan, and identify and record the development needs of the staff member required to assist them to achieve their work plan.
- Prioritise the skill development needs and discuss where and how these development needs could be met, and estimate the resource implications.
- Discuss the staff member's future career aspirations within the organisation and note the longer term development needs that will support this plan (as appropriate to the organisation's expected direction and growth in the coming year).

The results of this discussion should be documented using the skill development plan format provided below.

Step 3: Performance monitoring:

Monitoring of staff performance can occur at several levels:

- Regular discussions and verbal reports from the staff member on their progress in achieving their work program, through weekly or fortnightly supervision sessions with their supervisor/manager
- Regular formal written reporting on progress, through the aggregated staff reports to the supervisor/manager and The Boards.
- Formal performance appraisals or reviews (held six monthly and/or annually) where a formal interview is held between the staff member and their supervisor/manager

Step 4: Formal performance appraisal reviews

- Review the achievement of the work plan and identify the extent to which the staff member achieved the level of agreed performance
- Identify where the work plan may need to be adjusted either through changing organisational priorities, changes in resource allocation needs, or its continued relevance to the organisation's directions
- Review the skill development plan and assess its effectiveness in assisting the staff member to achieve their work plan and develop the desired skill levels
- Identify barriers the staff member experienced that inhibited their general performance, including inadequate resources, unclear management direction, competing priorities, need for more consistent management support.

During the performance appraisal interview, the final columns of the work plan and skill development plan may be used to note particular comments.

Following the performance appraisal interview, a brief written report with recommendations should be drafted by the supervisor/manager. A copy of this should be given to the staff member and a copy attached to the staff member's record of work plan, on their staff records.

Poor staff performance

Where a staff member is not performing to the level of agreed performance, the supervisor/manager should arrange a follow up interview with the staff member to identify the reasons for the poor performance and develop a performance improvement plan.

Where the poor performance relates in part or solely to the capacity of the staff member concerned rather than to external factors, the supervisor/manager should identify with the staff member the specific individual reasons for the poor performance and set agreed strategies and activities in place to be achieved by the staff member within an agreed time frame. This is known as a performance contract.

Should the staff member fail to meet their performance contract, disciplinary procedures may be followed, as per the staff member's contract of employment and the relevant industrial Award.

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Work Plan and reporting format

Name of Staff member:

Objective: [\[insert from organisation's strategic business or operational plan\]](#)

Tasks/Activities	Agreed time frame	Indicators of performance and/or standard of performance required	Comment on status of task/ activity

Supervisor/manager appraisal report:

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Skill development Plan

Name of Staff member:

<i>Work plan activity</i>	<i>Additional skill and/or work experience needed</i>	<i>Development activity recommended</i>	<i>Priority</i>	<i>Resource implication (including time away from work, financial cost, additional supervision time etc.)</i>	<i>Evaluation comment of development activity</i>

Long term development:

(Note the future career aspirations of the staff member and identify agreed strategies or opportunities by which these could be achieved)

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Documentation

Documents related to this policy	
Related policies	
Forms, record keeping or other organisational documents	<p>QF266A – Staff Development Planner</p> <p>QF266B – Employee Performance Agreement</p> <p>Induction checklists and records</p>