

Performance Development and Review Procedure

Section 1 - Purpose

(1) To document [Performance Development and Review](#) (PDR) steps.

Scope

(2) This Procedure requires actions by the following:

- a. Director, Human Resources
- b. Manager, Workplace Equity and Diversity
- c. Human Resources Manager (HR Manager) or HR Advisor;
- d. Organisation and Staff Development;
- e. Staff member; and
- f. Supervisor.

Section 2 - Policy

(3) Refer to the [Development, Performance and Review Policy](#).

Section 3 - Procedures

Responsibilities and Required Actions

(4) PDR is conducted throughout the year. It involves:

- a. planning and setting objectives;
- b. reviewing progress and providing feedback; and
- c. conducting a performance review.

Supervisor

Set Objectives

(5) Provide staff with information on the Faculty / Department / Office plans for the coming year.

(6) Discuss and agree the objectives, performance indicators and learning and development plans with the staff member and ensure these are loaded into the online PDR system.

(7) Review and approve a staff member's PDR objectives, performance indicators and development plans.

Review Progress and Provide Feedback

(8) Have regular discussions with a staff member to review progress and provide feedback on their performance. In

these discussions:

- a. review any issues relating to the staff member's workload;
- b. document achievements and milestones reached;
- c. document any unplanned objectives and / or changes to current objectives along with relevant changes to original performance indicators if required;
- d. determine whether the staff member is likely to achieve performance objectives and, where possible, resolve barriers to achievement;
- e. identify and plan ways to address learning and development needs; and
- f. provide constructive feedback.

(9) Provide coaching and developmental support.

(10) Provide timely feedback regarding:

- a. good / high performance; and
- b. poor performance, and development / actions required to achieve desired results and ultimate consequences if not met.

Perform End-Of-Year Review

(11) Prepare for the end-of-year PDR discussion by reviewing and preparing feedback on the staff member's performance and learning and development objectives.

(12) Meet the staff member to review and evaluate his or her performance during the year and ensure this is captured in the online PDR system.

(13) Where an end-of-year performance rating is required, and there are ratings in a work area from more than one supervisor, the Head of Office or Head of Department may conduct a moderation process to ensure ratings are applied consistently. If required, participate in a moderation process after which you advise staff of his or her performance rating.

Request Review By Higher-Level Staff

(14) If a staff member requests a review by higher-level staff, refer the PDR and other documentation to the next supervisory level for review.

(15) If you are the next-level supervisor, meet with the staff member before making a determination. If you cannot resolve the matter and the staff member considers there are issues of bias, direct or indirect discrimination on grounds as identified in the [Discrimination, Bullying and Harassment Prevention Policy](#), then refer the matter to the Director, Human Resources or Manager, Workplace Equity and Diversity for investigation.

Staff Member

Set Objectives

(16) Refer to the [Performance Development and Review](#) website for information on the process and how to use the online PDR system.

(17) Prepare or review initial performance objectives, learning and development plans and performance expectations and discuss these with your supervisor.

(18) Relevant information may include (but is not limited to):

- a. the Position Description;
- b. the strategic objectives of the University / Faculty / Office / Department;
- c. operational objectives for your work area;
- d. workload models; and
- e. academic promotional criteria.

(19) You can get this information from your supervisor.

(20) Ensure your objectives and learning and development plan are captured in the online PDR system and submitted to your supervisor to review and approve.

Review Progress and Obtain Feedback

(21) Document achievements, milestones and any unplanned objectives in your online PDR journal.

(22) Discuss your progress and outcomes regularly with your supervisor and seek feedback and support as needed to achieve your objectives and development goals.

Perform End-Of-Year Review

(23) Prepare for the end-of-year PDR discussion by reviewing your performance and learning and development objectives and evaluating your achievements and progress.

(24) Meet with your supervisor to review and evaluate your performance during the year.

(25) Update your online PDR and submit it to your supervisor for review.

Request Review by Higher-Level Staff

(26) If you do not agree with the objectives or outcomes of the PDR, you can request a review by higher-level staff, providing relevant supplementary information for review and final determination.

Human Resources Manager / HR Advisor

(27) Provide the first line of support for PDR enquiries.

(28) Track PDR completion rates.

(29) Report PDR completion rates to higher-level supervisors and to the Dean / Head of Office.

(30) Where moderation is used, co-ordinate the process.

Organisation and Staff Development

(31) Track and report PDR completion rates as appropriate.

(32) Ensure information and support on the PDR system and process is provided to staff.

(33) In the case of a bias / discrimination review, ensure all documentation relating to the review is placed in the relevant staff file.

Director, Human Resources / Manager, Workplace Equity and Diversity

(34) Investigate and decide any matters relating to bias or discrimination referred for review.

Section 4 - Guidelines

(35) Nil.

Section 5 - Definitions

(36) Commonly defined terms are located in the University [Glossary](#).

Status and Details

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Responsible Executive	Eric Knight Deputy Vice-Chancellor (People and Operations)
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