

## PERFORMANCE PLANNING AND REVIEW

### PURPOSE:

To facilitate the effective management and planning of individual performance for Breakaway Toowoomba Inc. staff.

### SCOPE:

- The role of performance planning and review within Breakaway Toowoomba Inc.

### POLICY:

1. All staff is required to participate in performance planning and reviews at established time intervals.
2. Reviews will be conducted prior to completion of probation period, prior to completion of fixed term contract or at least annually from the employee's commencement date.
3. Breakaway Toowoomba Inc. performance planning and review tools will be used.
4. There is to be a pre-arranged performance discussion using the completed tools and Position Description, between the employee, their immediate supervisor and the Executive Officer.
5. The employee has the right to the presence of an independent facilitator during the discussion, if preferred.
6. All performance planning and review tools and written outcomes are to be signed by both parties.
7. All staff will be educated during orientation regarding the function and procedure of performance planning and reviews.
8. All staff conducting performance discussions shall be trained in performance planning and review techniques, and be able to apply the related Breakaway Toowoomba policies and procedures.
9. The outcomes from the performance planning and review should have implications for both the employee and the supervisor in relation to the key result areas.

- 10 Where the employee is dissatisfied with the process or outcome of the performance discussion, the Breakaway Toowoomba Grievance Procedure may be instigated.
- 11 Disciplinary action and annual performance planning and review are separate processes. Disciplinary processes should be instigated at the time of occurrence and not delayed until the review time.

**PROCEDURE:**

- 1 Supervisor is to distribute Performance Review Form:
  - (a) on the anniversary of the employee's commencement date, if it is an annual review, or
  - (b) at the end of contract/review(probationary) period.
- 2 Supervisor to arrange the performance discussion interview time with the employee at least two weeks beforehand. Approximately 1.5 hours will be needed for an effective discussion.
- 3 If this is the first time this performance planning and review tool is used, and key result areas have not been established for the position or review period:
  - (a) supervisor and employee ensure they mutually understand the position requirements and responsibilities, and establish key result areas upon which the performance planning and review will be based.
  - (b) these are listed under Responsibilities/Key Result Areas in job description.
- 4 Employee completes Self Appraisal Form. The supervisor and employee discuss and verify Job Description Form.
- 5 Within one week and prior to the performance discussion, the supervisor and employee exchange completed forms and confirm the agreed appointment for the discussion (approx 1.5 hours).
- 6 If required, the employee may request an independent facilitator or advocate to be present during the performance discussion.
- 7 At the performance discussion, both parties systematically discuss the performance planning and review forms, referring to pages 1 to 3 of Position Description and Position Requirements for the next review period. Notes from this discussion are made.
- 8 Agreed outcomes are decided and professional goals established and entered on Performance Evaluation Form and Training and Development Plan.
- 9 These recommendations and plans are signed by both parties.
- 10 If the employee is dissatisfied with the outcome, they are to note that on the form, and they may instigate the Breakaway Toowoomba Grievance Procedure, and should do so within one (1) week.

- 11 All the above forms are to be kept in the employee's personnel records for six years. To ensure implementation of the plan, the employee and the Executive Officer is to keep a copy of Performance Review in the staff members personnel file.
- 12 Previous outcome sheets and position descriptions are to be referred to during all performance planning reviews.

Approved (Executive Officer) David Bell Date 18.02.10

Approved (Chairperson) Paul Dennis Date 18.02.10

Approved: OB