[Insert organisation name/logo]

# PERFORMANCE AND DEVELOPMENT PLAN AND REVIEW

|  |  |
| --- | --- |
| **Employee** |  |
| **Position** |  |
| **Length of time in position** |  |
| **Length of time with the organisation** |  |
| **Supervisor** |  |
| **Position** |  |

|  |  |
| --- | --- |
| **Meeting date** |  |
| **Meeting type** | **□ Qualification period review**  **□ Performance and development planning**  **□ Performance review**  **□ Annual review** |
| **Current plan develop** | **□ Yes □ No** |

**Performance assessment ratings**

|  |  |
| --- | --- |
| **5** | Consistently exceeds performance expectation and requirement of role, and contributes to raising the standards, profile and/or sustainability of the organisation |
| **4** | Performance indicators met and exceed expectation and requirement of role |
| **3** | Performance indicators met |
| **2** | Performance indicators partially met |
| **1** | Performance indicators not met |

## SECTION 1. PERFORMANCE INDICATORS

Insert functions areas and performance indicators as per position description.

|  |  |  |
| --- | --- | --- |
| **EXAMPLE TABLE\***  **Function area: *Work Health and Safety*** | | |
| ***Performance indicator*** | | ***Performance outcome*** |
| ***Support high standards of WHS across the organisation*** | | *Target outcomes*   * *Develop, participate and comply with WHS policies and practices* * *Identify areas for development* |
| *Actual outcomes*   * *Developed and participated in the review on the new WHS policy* * *Identified and changed emergency procedures to comply with new legislation* |
| **Notes** | | |
| ***Performance assessment rating*** | | ***Comments*** |
| Employee: | *E.g. 4* | *[Employee provides comments relating to the function area and the performance assessment rating]* |
| Supervisor: | *E.g. 4* | *[Supervisor provides comments relating to the function area and the performance assessment rating. Supervisor also responds to employee’s comments and ratings, as required]* |
| *\*Please delete table before finalising this plan* | | |

***🖌Note\****

1. *Supervisors are encourage to complete performance indicators and target outcomes in consultation with staff members.*
2. *It is important for supervisors to provide positive comments if they are performing well or constructive comments if staff members are not performing to the level expected.*
3. *Please complete a table for each function area according to the job description, please note that each function area can have one or more performance indicators.*
4. *To add more function areas copy and paste the table.*
5. *Examples for function areas could include:*

* *Quality improvement*
* *Work health and safety*
* *Team development*
* *Practice development*
* *Service delivery*

*\*Please delete note before finalising this plan*

|  |  |  |
| --- | --- | --- |
| **Function area: [insert function area]** | | |
| ***Performance indicator*** | | ***Performance outcome*** |
| **[insert indicator]** | | *Target outcomes*  **[insert target outcome]** |
| *Actual outcomes*  **[insert actual outcome]** |
| **[insert indicator]** | | *Target outcomes*  **[insert target outcome]** |
| *Actual outcomes*  **[insert actual outcome]** |
| **Notes** | | |
| ***Performance assessment rating*** | | ***Comments*** |
| Employee: |  |  |
| Supervisor: |  |  |

|  |  |  |
| --- | --- | --- |
| **Function area: [insert function area]** | | |
| ***Performance indicator*** | | ***Performance outcome*** |
| **[insert indicator]** | | *Target outcomes*  **[insert target outcome]** |
| *Actual outcomes*  **[insert actual outcome]** |
| **[insert indicator]** | | *Target outcomes*  **[insert target outcome]** |
| *Actual outcomes*  **[insert actual outcome]** |
| **Notes** | | |
| ***Performance assessment rating*** | | ***Comments*** |
| Employee: |  |  |
| Supervisor: |  |  |

## SECTION 2. PROFESSIONAL DEVELOPMENT

Insert functions areas and performance indicators as per position description

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Activity*** | | ***Date*** | ***Format*** | ***Key learning outcomes*** |
| **[insert activity]** | | **[insert date]** | **[insert format e.g. forum, certificate]** | ***[insert activity learning outcomes]*** |
|  | |  |  |  |
|  | |  |  |  |
|  | |  |  |  |
|  | |  |  |  |
| **Comments**  *Comment on professional development learning outcomes achieved* | | | | |
| Employee: |  | | | |
| Supervisor: |  | | | |

## SECTION 3. MAJOR ACHIEVEMENT AND CONTRIBUTION TO THE ORGANISATION

|  |  |
| --- | --- |
| *Detail significant achievements by the employee and any contribution made beyond the position description.* | |
| Employee: |  |
| Supervisor: |  |

## SECTION 4. PERFORMANCE CONCERNS AND STARTEGIES FOR IMPROVEMENT

|  |  |
| --- | --- |
| *What, if any, are the performance concerns from the supervisor, organisation or employee regarding individual performance? What strategies can be implemented to support change?* | |
| Employee: |  |
| Supervisor: |  |
| Action/s |  |

## SECTION 5. ADDITIONAL SUPPORT OR ORGANISATIONAL CHANGE FOR THE EMPLOYEE TO UNDERTAKE DUTIES

|  |  |
| --- | --- |
| *Does the employee require additional support to undertake the duties of the position? Are there any organisational changes proposed?* | |
| Employee: |  |
| Supervisor: |  |
| Action/s |  |

## SECTION 6. REVIEW OF POSITION DESCRIPTION

|  |  |
| --- | --- |
| *Does the current position description match the duties asked of the employee? Are there additional or not relevant functions and performance indicators?* | |
| Employee: |  |
| Supervisor: |  |
| Action/s |  |

## SECTION 7. REVIEW OF REMUNERATION PACKAGE AND/OR FLEXIBLE WORK PRACTICES

|  |  |
| --- | --- |
| Employee: |  |
| Supervisor: |  |
| Action/s |  |

## SECTION 8. ADDITIONAL COMMENTS

|  |  |
| --- | --- |
| *For example, are there additional skills not being utilised, job satisfaction rating.* | |
| Employee: |  |
| Supervisor: |  |
| Action/s |  |

## SECTION 9. FOLLOW UP AND CLOSING

|  |  |
| --- | --- |
| **Next review scheduled for:** | **□ 3 months**  **□ 6 months**  **□ 12 months** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Employee** | | | | |
| **Name** |  | | | |
| **Signature** |  | | **Date** |  |
| **Supervisor** | | | | |
| **Name** |  | | | |
| **Signature** |  | **Date** | |  |