[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** |  |