THE UNIVERSITY OF NOTRE DAME AUSTRALIA

Procedure:

Performance Development

Effective: 16 November 2023

Audience: All staff

Policy Category: Management
Policy Sub-category: Human Resources

Key words:	performance development, performance development plan, performance development process
Procedure Owner:	Pro Vice Chancellor, People & Culture
Responsible Officer:	Director, Organisational Development
Review Date:	November 2026

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1 PURPOSE

1.1 This Procedure sets out the process to align the development and contribution of employees to the achievement of the University's strategic and operational plans, priorities and build a high-performance culture.

1.2 This Procedure supports the implementation of the *Policy: Performance Development* by outlining the steps in the annual performance development process which includes:

1.2.1 planning and setting performance and development goals
1.2.2 reviewing progress and providing feedback, and
1.2.3 conducting an end-of-year review.

2 RELATED POLICIES AND REGULATIONS

2.1 This Procedure should be read in conjunction with the following policies:

2.1.1 *Policy: Performance Development*
2.1.2 *Policy: Unsatisfactory Performance*
2.1.3 *Policy: Probation*

3 PERFORMANCE DEVELOPMENT PROCESS

3.1 The Performance Development process is a continuous 12-month planning and review cycle based on a calendar year and includes:

3.1.1 setting the Performance Development Plan (PDP)
3.1.2 reviewing progress and providing feedback, informally throughout the year and in a mid-year review, and
3.1.3 conducting an end-of-year review.

3.2 The Performance Development cycle occurs from January through to December, however, may be finalised as late as February subject to operational planning and timelines.

3.3 All employees are to have a Performance Development Plan (PDP) in place, which focuses on the employee's development as well as setting individual performance goals.

3.4 For employees on probation, the Performance Development process will be used to inform the probation process.

3.5 Within the first month of employment, managers will work with the probationary employee to define clear performance expectations within their PDP for the probationary period.

4 SETTING THE PERFORMANCE DEVELOPMENT PLAN

4.1 Senior Leaders will convey expectations to managers and clarify goals and objectives for the faculty/division for the coming year in the context of the University's strategic and operational plans and priorities.

4.2 Managers will communicate and cascade information on the faculty/division and team plans and priorities for the coming year to employees, to inform the development of individual performance goals and measures.

4.3 At the start of each calendar year, employees are to identify (or review) proposed:

4.3.1 performance goals and measures for the year that align with the University's strategic and operational plans, priorities and their position description

4.3.2 behaviours that describe how their work aligns and supports the University's Guiding Principles, and

4.3.3 development goals and actions that support the employee's professional and career development aspirations.

4.4 Each performance goal should outline clear measures of success to indicate the standard, target level, outcome and/or timeframe required to be achieved.

4.5 Managers and employees are to meet to discuss and agree on the performance and development goals and their measures/actions for the year ahead and record them in the employee's PDP.

4.6 Once the plan is set, employees are to sign and submit the PDP to their manager to review and approve.

5 REVIEWING PROGRESS AND PROVIDING FEEDBACK

5.1 Regular informal meetings between the manager and employee should occur throughout the year to provide timely feedback to guide performance and development, review progress, acknowledge achievements and provide support and encouragement.

5.2 Where an employee is having difficulty meeting their performance development goals, managers are to promptly provide specific feedback and support.

5.3 Mid-year review

Managers are to meet with employees to conduct a mid-year review around June each year, to discuss the employee's progress against their PDP and determine if any changes to the plan are required. Both managers and employees should come prepared to have a future-focussed discussion.

5.4 Self-assessment

Employees should be making notes throughout the year on their progress, achievements and feedback against their performance and development goals in their PDP and share their self-assessment with their manager prior to the end-of-year review meeting.

5.5 End-of-year review

Managers are to meet with employees to conduct an end-of-year review around December each year, to review and evaluate the employee's performance against their PDP during the year and provide comments and a rating on the employee's overall performance.

5.6 Following the meeting, the manager will record their comments in the PDP and forward it to the employee to sign to acknowledge.

5.7 At any stage of the Performance Development process, if an employee's performance does not improve within a reasonable timeframe or is deemed unsatisfactory, formal Performance Management processes may commence in line with the *Policy: Unsatisfactory Performance*, or for employees on probation in line with the *Policy: Probation*.

6 RELATED DOCUMENTS

6.1 *Performance Development Plan – Professional employees*

6.2 *Performance Development Plan – Academic employees*

6.3 *Guide: Performance Development*

7 DEFINITIONS

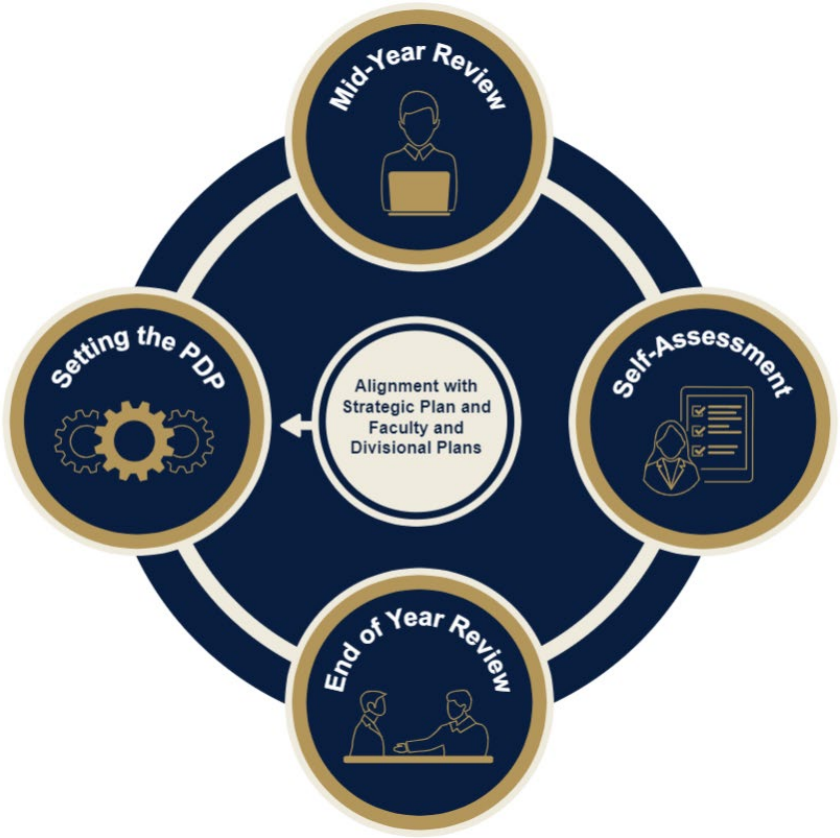
7.1 For the purpose of this Procedure, the definitions outlined in the *Policy: Performance Development* apply.

7.2 In addition, the following definitions apply to this Procedure:

7.2.1 ***Measures of success*** means descriptions that indicate the standard, target level, outcome and/or timeframe required to demonstrate achievement or progress towards an agreed performance development goal.

7.2.2 ***Performance development plan (PDP)*** means the form used to record an employee's performance and development goals, measures/actions and review feedback.

8 PERFORMANCE DEVELOPMENT PROCESS CYCLE



Version	Date of approval	Approved by	Amendment
1	16 November 2023	Vice Chancellor	New procedure, approved with new *Policy: Performance Development*.