PDM

PERFORMANCE   DEVELOPMENT   & MANAGEMENT

University of
South Australia

PDM

Foreword from the Vice Chancellor

Since its establishment in 1991, the University of South Australia has developed and maintained a proud record of achievement built on its foundation commitments to excellence and equity.

We also recognise that in the rapidly evolving global education landscape, the role and the expectation of universities continues to undergo significant change. In order to meet these challenges, we must ensure we remain a flexible, enterprising institution that works closely in partnership with our communities so we can best respond to local, national and global needs.

At the heart of these aspirations are the efforts and the talents of our staff. Through their passion for delivering world-class education, their commitment to a culture of service excellence and their focus on team-based, collaborative outcomes staff are integral to the development of a dynamic, innovative workplace and to achieving our shared goals.

These qualities are reflected in *Enterprise 25*, our strategic action plan that identifies the importance of a strong workplace culture, emphasises the value of leadership and team-based approaches, and aims to ensure that the University of South Australia is an inspiring place in which to work, as well as study.

The importance of individual and collective success also guides the renewal of our people management policies and processes, and the foundation stone of

these policies is our Performance Development and Management (PDM) framework. The framework has been designed to assist and support staff to develop and achieve their optimal performance, to contribute to the performance and reputation of their work unit, school or research concentration, and to benefit the University as a whole.

The PDM framework has been developed to help staff identify and set their priorities and goals, and to align their output with that of their local work area, and of the institution more broadly. PDM also provides opportunities for regular feedback, professional development and career guidance, as well as a mechanism to explore other issues vital to the success of individual and collective work roles.

I look forward to your ongoing involvement in and commitment to further improving our performance. I believe this resource will assist all of us to achieve our goals, and best position ourselves for the future.

Professor David Lloyd
Vice Chancellor and President

▶ **NEXT SECTION: PDM GUIDELINES**

GUIDELINES

- Foreword from the Vice Chancellor
- Performance Development and Management (PDM)
- Print-friendly version

PERFORMANCE DEVELOPMENT & MANAGEMENT

PDM

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▶ **NEXT SECTION: PDM GUIDELINES**

PDM

Performance Development & Management Guidelines

Introduction to Performance Development and Management

What is performance development and management?

Simply, performance development and management (PDM) is about staff and their manager having a conversation.

Staff and managers talk about what quality performance outcomes are required and listen to each other about what is needed to deliver those outcomes. The performance conversation provides clarity about what staff need to do and what is expected of them so that they can better contribute to the University's effectiveness.

Effective performance conversations are an important way to keep staff engaged and motivated.

Performance development and management (PDM) conversations clarify:

1. Why are we here?
2. What do we need to do and by when?
3. How well do we need to do it?
4. What support do we need to achieve it?
5. How well are we doing it (ie achievements); and
6. How will this be recognised?

Answers to these questions form the basis of performance plans.

PDM is generally a conversation between a staff member and their manager. However, in some cases, it may be appropriate for teams to be involved in establishing the performance expectations for the team.

PDM is a participative process in which the staff member and their manager share responsibility for the development of a PDM plan. There are a number of benefits of this process, including:

- achieving strategic goals;
- building a high performing workforce and organisation by emphasising an outcomes-focused culture;
- providing an opportunity to self-reflect and to celebrate achievements;
- increasing motivation and job satisfaction;
- providing a shared vision and purpose;
- developing clear expectations, roles and responsibilities and identifying the resources and development required to achieve goals; and
- improving the communication and understanding of requirements between staff and managers.

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PDM is a two-way process where, using these principles, both the staff member and manager have responsibility to:

- fairly, objectively and actively participate in the development of the staff member's performance plan;

- take into account professional, personal and organisational needs when engaging in performance development and management;

- identify clear outcomes, clarify expectations and identify appropriate timeframes;

- effectively communicate progress towards achieving outcomes and provide feedback about performance (both of the staff member's performance and the manager's performance in supporting the staff member).

Many business processes link to PDM at UniSA and support the development of quality performance plans. For example:

Enterprise 2025	UniSA's Corporate Plan *	Local Area Strategic Plan *	Position Description
UniSA's value & culture	Performance Development & Management		Induction
Professional Development	Professional Experience Program (Academic)	Academic Promotion (Academic)	Probation
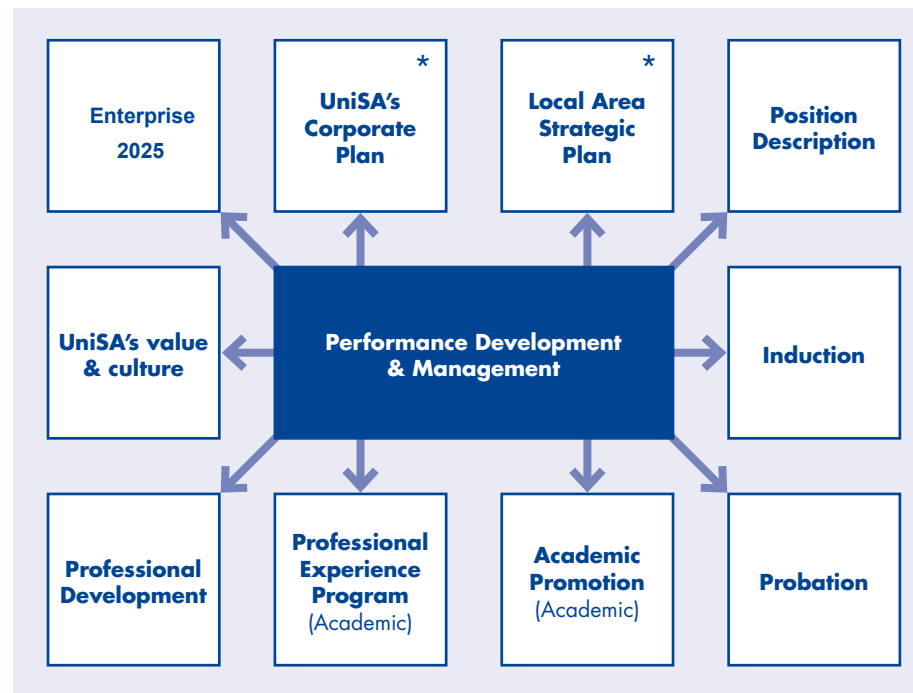
* Line of sight – is aligning the PDM plan of staff to the Local Area Strategic Plan together with UniSA's Coporate plan.

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Performance Development & Management Guidelines

Roles

Specific roles in actively engaging in PDM are:

Staff	• prepare for performance conversations with their manager; • have conversations with their manager to establish performance outcomes and development needs; • track and advise their manager about their progress towards achieving their performance outcomes; and • continuously strive to do the best they can.
Managers / Supervisors	• prepare for performance conversations with their staff; • have conversations with their staff to establish performance outcomes and development needs; • provide their staff with regular feedback (both informal and formal) about their staff's progress towards achieving their performance outcomes; and • support their staff to continuously strive to do the best they can.
People Talent & Culture	• integrate PDM into the operations of their work area; and • support staff and managers to enhance their performance.

Responsibilities

Performance development and management is everyone's responsibility.

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PDM Performance Development & Management Guidelines

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People, Talent & Culture	• integrate PDM into the operations of their work area; and
	• support staff and managers to enhance their performance.

Responsibilities

Performance development and management is everyone's responsibility.

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Further information

• The **Performance Management Policy (HR-25.1)** provides details about roles and responsibilities.

• **Contact your local PTC Business Partner.**

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PDM Performance Development & Management Guidelines

2-Steps to Better Performance

UniSA's "2 Steps to Better Performance" is a streamlined framework that illustrates PDM at UniSA.
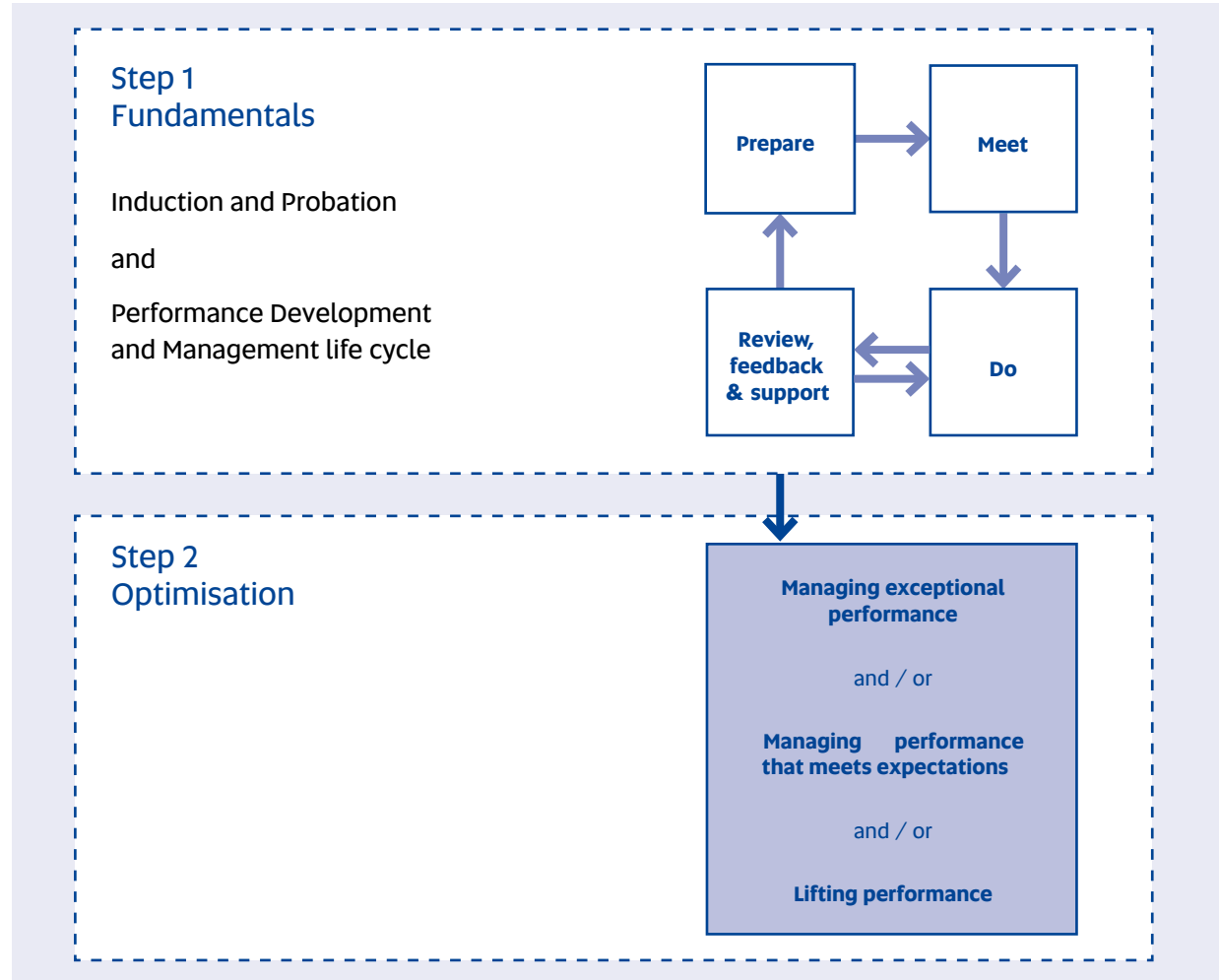
Step 1
Fundamentals

Induction and Probation

and

Performance Development and Management life cycle

Prepare → Meet → Do → Review, feedback & support → Prepare

Step 2
Optimisation

Managing exceptional performance

and / or

Managing performance that meets expectations

and / or

Lifting performance

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PDM Performance Development & Management Guidelines

Step 1 – Fundamentals

Induction and Probation and Performance Development and Management life cycle

Step 1 is the commencement point of PDM at UniSA. It consists of the essential building blocks of PDM, namely, induction, probation and the performance development and management life cycle.

The fundamentals reflect all the essential elements that need to be in place to ensure the staff member and their manager align work outcomes with the strategic direction of the University to enable optimal performance.

Induction

Although exciting, moving to a new role and/or workplace can also be daunting for staff.

Induction is the foundation of UniSA's commitment to organisational learning and staff development and it takes place across the University. Induction is designed to:

- provide the staff member with the tools and appropriate development opportunities needed to perform their new role;
- help the staff member integrate with others so that they can effectively work together; and
- assist the staff member (and their team) deliver better results faster.

Induction is the critical first stage of the PDM framework for both new staff and existing staff commencing in a new role at the University.

Induction is an opportunity to discuss team and organisational expectations.

During induction, the manager and staff member should action the items on the staff member's induction program including the development of the staff member's PDM plan. Develop this plan within 2 weeks of commencement for Professional, Security and Grounds staff and within the first month of commencement for Academic staff.

Induction will cover critical information for new staff including:

- Child protection
- Confidentiality
- Equal opportunity and anti-discrimination
- Ethics and compliance
- Ethical conduct
- Intellectual property and copyright
- Occupational health, safety and welfare
- Policies and procedures
- Vice Chancellor's authorisations.

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Performance Development & Management Guidelines

Key things to remember about Induction:

Develop the performance development and management plan within:

- *4 weeks of an Academic staff member commencing in a new role;*
- *2 weeks of a Professional, Security and Grounds staff member commencing in a new role.*

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Probation

At the commencement of employment with the University (or in some cases a new role), staff are placed on a period of probation. The applicable industrial instrument outlines the reasonable probation period for staff.

Probation provides the opportunity for:

- the manager to assess the suitability and capability of the staff member in the new role;

- the staff member to assess their suitability and capability with the position and the University;

- the staff member to be inducted and provided with appropriate development opportunities; and

- the University to make a decision about the continuation of employment beyond the end of the probationary period.

During the probationary period:

- the staff member and their manager meet to establish performance expectations;

- the manager and staff member establish a performance plan for the probation period within the required timelines;

- the staff member and manager (where it has been identified) action the items on the staff member's performance plan;

- the staff member and their manager regularly meet to track performance; and

- the staff member and manager actively participate in performance and development conversations.

PDM — Performance Development & Management Guidelines

The following flowcharts provide an example of PDM during probation.

Academic staff (3 year probationary period)

Staff member starts new role	Month 1 Develop PDM Plan	Months 12 & 24 Formal reviews	Month 32 Final review to determine probation outcome	Month 33 Formal advice of outcome to staff member	Month 36 Employment confirmed subject to satisfactory performance

Informal feedback should occur regularly throughout the probationary period

Note:
- If it is deemed appropriate to extend the staff member's probation, Executive Director: People, Talent & Culture approval is required.
- If it is deemed appropriate to terminate the staff member's employment, Vice Chancellor approval is required.
- The Academic staff member requires 3 months' notice of any approved extension or decision to terminate employment.
- Timelines may be adjusted in accordance with probationary period (if less than three years).

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Professional, Security and Grounds staff (3 month probationary period)

| Staff member starts new role | Week 2 Develop PDM Plan | Week 5 Formal review | Week 9 Final review to determine probation outcome | Week 10 Formally advise staff member of final outcome | Week 12 Employment confirmed subject to satisfactory performance |
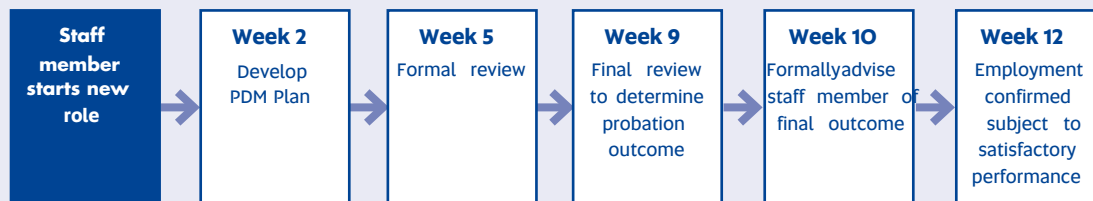
Informal feedback should occur regularly throughout the probationary period

Note:

- If probation is to be extended, or employment terminated, Executive Director: People, Talent & Culture approval is required.

- If employment is to be terminated, the staff member needs at least 2 weeks' notice.

- Timelines may be adjusted in accordance with probationary period (if greater than 3 months and this has been determined prior to commencement of employment).

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Key things to remember about probation:

1. *Regular two-way feedback (informal and formal) should be given between the staff member and their manager to track the staff member's performance and their achievement of expected outcomes.*

2. *Any recommendation to extend probation requires approval by the Executive Director: People, Talent & Culture es. Extension may only occur subject to agreement of the staff member concerned.*

3. *Any recommendation to terminate during probation requires approval by the Vice Chancellor (Academic positions) and Executive Director: People, Talent & Culture (Professional, Security and Grounds positions).*

4. *Should the staff member's probation need to be extended or employment terminated during probation, contact your local PTC Business Partner as soon as practicable, who will liaise with the PTC Unit to assist you through this process.*

5. *A final review of the staff member's performance must be done prior to the expiration of the staff member's probation. Following this review, the manager must make are commendation to the appropriate senior manager (refer to the Vice Chancellor's Authorisations) as to whether the staff member's employment is confirmed or should be terminated, or probation extended.*

6. *If probation is to be extended, approval is required from the Executive Director: People, Talent & Culture.*

7. *If employment is to be terminated during probation:*
   - *3 months' notice is required for Academic staff;*
   - *at least 2 weeks' notice is required for Professional, Security and Grounds staff.*

8. *Once a staff member's employment with the University is confirmed, a longer-term performance plan needs to be developed.*

i Further information

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Performance Development & Management Guidelines

Key things to remember about probation:

1. Regular two-way feedback (informal and formal) should be given between the staff member and their manager to track the staff member's performance and their achievement of expected outcomes.

2. Any recommend... approval by the D... may only occur su... concerned.

3. Any recommenda... requires approval... positions) and Di... (professional posi...

4. Should the staff member's probation need to be extended or employment terminated during probation, contact your local PTC team as soon as practicable. Your local PTC professional will liaise with the PTC Unit to assist you through this process.

5. A final review of the staff member's performance must be done **prior** to the expiration of the staff member's probation. Following this review, the manager must make a recommendation to the appropriate senior manager

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   ...extended.

   ...oval is required from

   ...during probation:

   ...Academic staff;

   ...ofessional, Security
   and Grounds staff.

8. Once a staff member's employment with the University is confirmed, a longer-term performance plan needs to be developed.

Further information

- **Vice Chancellor's Authorisations** provides information about the designated positions that can approve appointment to a position or termination of employment following probation.
- **UniSA's induction web page** provides the latest induction information and resources.
- **UniSA's probation web page** provides the most recent information about probation for staff.
- The **applicable industrial instrument** outlines the reasonable probation period for staff.
- **Contact your local PTC Business Partner**

Further information

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PDM Performance Development & Management Guidelines

Performance Development and Management life cycle

There are four stages in the performance development and management life cycle:

1. *Prepare:*
   the staff member and their manager prepare for the formal performance development and management conversation

2. *Meet:*
   the staff member and their manager meet to discuss previous performance and to plan the performance outcomes to be achieved in the following period

3. *Do:*
   the staff member/ manager do the agreed work/ actions to achieve the performance outcomes

4. *Review, feedback and support:*
   the staff member and their manager track performance and provide each other with regular feedback about progress toward the agreed performance outcomes

Prepare → Meet → Do → Review, feedback & support →
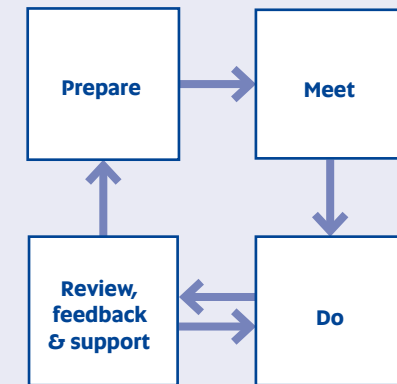
Each stage of the life cycle is further explained in this guideline.

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Performance Development & Management Guidelines

Getting the ball rolling...

Prepare

The life cycle commences with the "Prepare" stage.

There are several purposes to this stage:

- enables the staff member and their manager to individually review and reflect on the staff member's performance from the previous period (if applicable);

- information is gathered to effectively plan for the staff member's expected performance outcomes in the following period; and

- enables the staff member and their manager to individually consider what development opportunities the staff member requires to achieve performance outcomes and for career progression.

Prepare → Meet

Review, feedback & support ↔ Do

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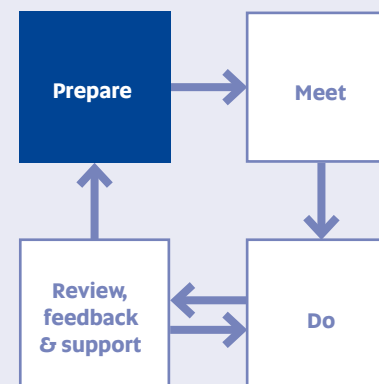
What needs to be done during the "Prepare" stage?

The staff member and their manager:

- reflect on the staff member's performance in the past year;
- review the past year's PDM plan; and
- review any supporting documentation to reflect on past performance and to plan for the next year's expected performance outcomes.

Prior to having the *"Performance Conversation"*, staff and managers should *individually* consider the following:

- Staff Activity Report *(data suite) – Academic staff*;
- Staff member's curriculum vitae – *Academic staff*;
- Current or previous PDM plan;
- Staff member's position description (for more information about position descriptions, please refer to the job analysis webpage);
- The *Self-Reflection* template;
- The Performance conversation Fact Sheet;
- Relevant plans (UniSA/Portfolio/Research Institute/Unit/Manager);
- Enterprise 2025 defines UniSA's aspirations. This webpage also provides links to UniSA's vision, mission and values.

The outcome of the "Prepare" stage is that the staff member and their manager are prepared for the PDM meeting.

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Some tips about gathering information about performance

· *Feedback needs to be based on verifiable work performance and behaviour.*

· *Information can be qualitative or quantitative.*

· *Assessment by the staff member's peers and/or team can be extremely helpful as one element to assess staff performance. However, the manager must obtain the staff member's permission to gather peer and team assessments prior to collecting this information.*

i Further information

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Performance Development & Management Guidelines

Some tips about gathering information about performance

· Feedback needs to be based on verifiable work performance and behaviour.

· Information ca[n]

· Assessment by th[e] helpful as one ele[ment] must obtain the s[...]

Further information
- Developing Professional Staff @ UniSA: A Quick Guide for Managers
- Managing Your Development: A Quick Guide for Professional Staff

i Further information

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Bringing people together…

Meet

"Meet" is the second stage of the PDM life cycle. It is when the staff member and their manager discuss the staff member's previous performance.

It also ensures that both the staff member and their manager discuss and are clear about:

- each other's expectations, roles and responsibilities;
- what is to be achieved by the staff member;
- what development the staff member will undertake; and
- what will be addressed during the review stage of the life cycle.

```
Prepare → Meet
   ↑         ↓
Review,   ← Do →
feedback
& support
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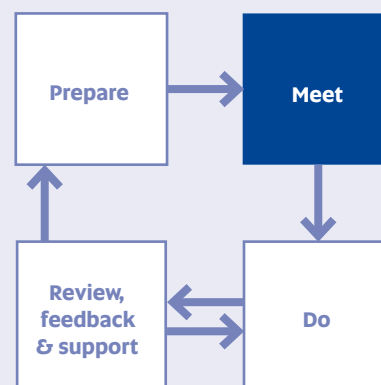
What needs to be done during the "Meet" stage?

The staff member and their manager:

- look back on previous performance;
- provide feedback on previous performance;
- plan the future year's agreed outcomes;
- summarise their discussions at this meeting in a PDM plan; and
- identify any skills development required by the staff member to carry out current and future outcomes.

The focus of this stage is having an open and honest conversation between the staff member and manager.

At the end of this stage, the staff member and manager should be clear about what is to be achieved by the staff member and have summarised this in the staff member's PDM plan.

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Some tips about having the conversation

- *Focus on the performance and not the performer*
- *As performance feedback is given regularly, there should be no surprises*
- *Emphasise future performance and growth*
- *Promote achievements and strengths as well as areas for development*
- *Engage in two-way dialogue (the staff member should do most of the talking)*
- *Base the review on specific accomplishments*

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Career development

Career development is an important part of the PDM conversation. Career development focuses on staff building their capabilities to achieve their full potential. It is not necessarily about changing jobs or advancing through promotion; it may also include continuing to grow in the current role, shifting focus of current work into a new area at the same level, developing skills, or growing existing skills.

Performance and development plans

As mentioned above, the focus of PDM needs to be on the conversation between the staff member and manager. However, it is important to summarise this conversation in a plan to ensure that the staff member and manager remain clear about what outcomes and development need to be achieved for the performance period.

Templates are available to get you started. These can be modified to suit local area needs, however, it is important to note that all PDM plans must contain:

- the key outcomes (which link to the corporate goals) the staff member will achieve during the performance period;
- the development or support that the staff member requires to achieve these outcomes and to further their career; and
- an occupational health, safety and welfare (OHS&W) training plan.

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Performance Development & Management Guidelines

All PDM outcomes need to be 'SMART':

S	Specific:	Define the expectation as clearly as possible by avoiding generalities and using action verbs as much as possible.
M	Measurable:	Define specific metrics for quantity, quality, timeliness and cost that can be objectively measured.
A	Achievable:	Ensure that the goals are challenging but within reason. While each individual goal may be achievable, make sure the staff member is reasonably able to achieve all of the collective outcomes successfully.
R	Relevant:	Link the outcomes to relevant local area or University strategic goals to ensure that the staff member and manager understand how that outcome contributes to the 'bigger picture'.
T	Time-bound:	Specify a date when the outcome needs to be completed.

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Performance Development & Management Guidelines

Developing measurable performance outcomes can be done easily by answering 4 simple questions.

1. What are you going to do/achieve?	This is the outcome
2. When are you going to do it by?	This is the timeframe
3. What will it look like when it's done really well?	This is the standard
4. How will you do it?	These are the actions required to achieve the outcome. The amount of detail you include here will depend on the classification of the position, how long the staff member has been in that role and the complexity of the outcome requirements.

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For example:

A manager has two staff reporting to them. Neither staff member has a PDM plan yet for this year. One outcome in the manager's PDM plan may look like this:

Outcome:	All reporting staff members have a performance and development plan
Timeframe:	30 June 2025
Standard:	Both direct reports will have PDM plans aligned to corporate goals

Actions:

1. schedule initial PDM meeting with each staff member
2. prepare for each PDM meeting
3. have PDM conversation with each staff member
4. ask each staff member to summarise PDM conversation in a plan (ensure staff outcomes are SMART)
5. review draft plans and finalise in collaboration with each staff member
6. schedule quarterly formal PDM review meetings with each staff member
7. ensure regular, informal feedback is given to each staff member

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Performance and teams

Teams enable staff the opportunity to work collaboratively. This can result in increased job satisfaction and personal development as teamwork can open up a diverse range of perspectives. The sharing of responsibility within teams can enhance performance and provide additional support.

Some tips about developing team performance outcomes:

- establish ground rules and create an environment of trust
- develop team outcomes collaboratively
- ensure the team meets frequently to track performance progress, to identify any barriers to success and to provide feedback
- ensure team members meet on an individual basis with their manager to track individual performance progress

i Further information

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Performance and teams

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The sharing of responsibility w[...]
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support.

Some tips about developing team performance outcomes:

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[...]

performance progress

Further information

Further information

- Refer to the **templates section** for sample templates you can use to summarise your PDM conversations.
- **Contact your local PTC Business Partner.**

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Getting the job done...

Do

"Do" is the third stage of the PDM life cycle.

It is the stage of the life cycle where the agreed outcomes detailed in the staff member's PDM plan are accomplished.

During the "Do" stage, the staff member and their manager (where it has been identified) action the items on the staff member's PDM plan in the defined time period.

This demonstrates how the staff member has contributed to the achievement of the University's outcomes.

Prepare → Meet → Do ← Review, feedback & support → (cycle back to Prepare)

PDM

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Tracking performance

The staff member and manager both have similar roles to play in tracking the staff member's performance against agreed expectations.

Staff member's role	Manager's role
• provide feedback to manager about how things are going	• track progress through observation and stakeholder feedback and discuss with the staff member early if things are going off-track
• notify the manager early if things are going off-track	• undertake regular performance conversations with the staff member to obtain feedback and to provide feedback on performance to date
• check with the manger to confirm their understanding of the outcomes and actions required to meet those outcomes	• regularly check for staff member understanding of the outcomes and actions required to meet outcomes
• be prepared to adjust plans if circumstances change	• be prepared to adjust plans if circumstances change

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	• performance conversations ...ber to obtain feedback and to ...on performance to date
understanding of the outcomes and actions required to meet those outcomes	...staff member understanding of the outcomes and actions required to meet outcomes
• be prepared to adjust plans if circumstances change	• be prepared to adjust plans if circumstances change

Further information

- **UniSA's staff development webpage** provides links to staff development opportunities that are available to support staff achieve the outcomes detailed in their performance plans
- **Contact your local PTC Business Partner**

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Giving you a voice…

Review / feedback / support

The final stage of the PDM life cycle is the "Review/feedback/support" stage.

It ensures that:

- the staff member's growth and development is enhanced; and
- progress towards the agreed outcomes in the staff member's performance and development plan is facilitated.

[Diagram: Prepare → Meet → Do → Review, feedback & support → Prepare]
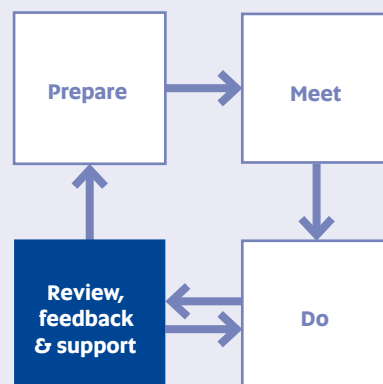
What needs to be done during the "Review/feedback/support" stage?

The staff member and their manager:

- provide each other with informal feedback about how the staff member's performance is tracking towards the achievement of the agreed outcomes;
- make notes of progress towards achieving the agreed outcomes for discussion at the formal PDM meetings; and
- meet formally on a regular basis.

Throughout this stage, the staff member and their manager:

- have ongoing dialogue about the staff member's performance and development; and
- develop a supportive relationship built on trust, respect and mutual understanding.

In addition, the staff member should feel supported, motivated and empowered to manage their work, career and contributions towards the achievement of the University's outcomes.

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Feedback

Providing feedback is one of the most important skills. Feedback replays to the staff member/ manager what they did in a specific situation and highlights the impact of what the staff member/ manager did. It may also include a discussion of what could be done better next time.

Positive feedback consisting of simple praise is even more powerful when it is specific about why or how the staff member/manager did a good job.

Constructive feedback sensitively informs the staff member/manager what they could do better next time.

Create a feedback expectation to enable open and honest conversations and make it easier for the staff member and their manager to give and receive feedback. Create a feedback expectation by developing:

- a partnership between you and your staff member/manager where you both feel comfortable to give and receive feedback about expectations.

Feedback (continued)

- trust between you and your staff member/ manager which enables open conversations. Trust can be built by strengthening your:

  - approachability – people need to feel that having a conversation with you is a safe thing to do and that you will treat them with respect.
  - Dependability – people will be more likely to trust you when they know they can rely on you to do what you say you will do.
  - openness – people will be open if they see you being open in expressing your thoughts and feelings, and being open to their ideas and feedback.
  - integrity – people will consider you to have integrity if they view you as being ethical and of trustworthy character.
    (adapted from "The man who cured the performance review: a practical and engaging guide to perfecting the art of performance conversation" by Graham Winter, 2009)

Preparing yourself for giving feedback

- Be focused – de-clutter your mind of other things.
- Choose a time when you and your staff member/ manager will not feel rushed.
- Choose an appropriate location.

PDM

Performance Development & Management Guidelines

Receiving feedback

It is important to ask for feedback from others to track how you are meeting expectations. The key to receiving feedback positively is to respond in an open and constructive way and acknowledge that all feedback (either positive or constructive) is an opportunity to learn and develop. When receiving feedback:

Receive	→	Reflect	→	Respond	→	Repair

Receive the feedback by:
- keeping an open mind; and
- thanking the person for their feedback but not reacting immediately.

Reflect on the feedback by:
- asking for some time to think about what the person has said;
- asking for specific details if you are unclear of what is being said or to better understand their views; and
- summarising back what you have heard to check your understanding.

Respond to the feedback appropriately.

Repair the performance by giving and/or using opportunities to learn and develop.

(adapted from "The man who cured the performance review: a practical and engaging guide to perfecting the art of performance conversation" by Graham Winter, 2009)

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PDM

Performance Development & Management Guidelines

Some tips about feedback

- Feedback should be 'FAST':

  Frequent: Give feedback regularly so that the manager/staff member has an accurate, up-to-date understanding of their performance strengths and areas of development.

  Actionable: Make sure that recommended actions/behaviours are within the control of the staff member/manager in their current position and that it helps them do their current job better.

  Specific: Describe and focus on the actions/behaviours that the staff member/manager did (or did not do).

  Timely: Give the feedback as soon as possible to the action or event. This maximises the impact of feedback on performance.

- Pick the right place – feedback is best given in a private setting, without interruption.

- Present all of the facts clearly, but ensure you keep an open mind.

(adapted from "Fast Feedback" by Bruce Tulgan, 1999)

i Further information

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PDM

Performance Development & Management Guidelines

Some tips about feedback

· *Feedback shou*

Frequent: *Give*
an a
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Actionable: *Mak*
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Specific:

Timely:

· *Pick the right place – feedback is best given in a private setting, without interruption.*

· *Present all of the facts clearly, but ensure you keep an open mind.*

(adapted from "Fast Feedback" by Bruce Tulgan, 1999)

Further information

• **Providing Quality Feedback: A Good Practice Guide** contains more information about giving and receiving feedback.

• Refer to the **templates section** for sample templates you can use to summarise your PDM conversations during formal reviews.

• **Developing Professional Staff @ UniSA: A Quick Guide for Managers**

• **Managing Your Development: A Quick Guide for Professional Staff**

• **Contact your local PTC Business Partner**

ⓘ Further information

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Performance Development & Management Guidelines

Step 2 – Optimisation

Step 2 is the "optimisation" of performance and consists of ongoing, regular feedback, review and support between the manager and staff member to enable the staff member to contribute to UniSA's high performance culture.

There are three components to the Optimisation step of UniSA's PDM framework:

- *Managing exceptional performance:*
  the staff member consistently excels in demonstrating the capabilities required to achieve performance outcomes.

- *Managing performance that meets expectations* the staff member fully demonstrates the capabilities required to achieve performance outcomes.

- *Lifting performance*
  the staff member does not consistently demonstrate many of the capabilities required to achieve performance outcomes. The staff member requires development and coaching to meet performance outcomes.

Step 2 Optimisation

Managing exceptional performance

and / or

Managing performance that meets expectations

and / or

Lifting performance

An individual staff member may be performing above expectations in one component of their role, but not meeting performance expectations in another component of their role. Therefore, a manager may need to support a staff member lift their performance in one component whilst recognising they meet performance expectations in another component of their role.

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Performance Development & Management Guidelines

Some tips on coaching

UniSA uses the GROW coaching tool to support and optimise staff performance. The aim of coaching is to ask questions that enable others to come up with the answers.

A useful metaphor for GROW is a map: once you know where you are going (the goal) and where you are (the reality), you can explore possible ways of making the journey (options) and choose the best action or approach (way forward).

(adapted from "Coaching for Performance" by John Whitmore, 1996)

2. Reality: Where are you now?

1. Goal: Where are you going?

3. Options: Explore options to achieve your goal

4. Way forward: Which option is the best approach?

i Further information

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Performance Development & Management Guidelines

Some tips on coaching

UniSA uses the GROW coaching tool to support an... performance. The a... to ask questions that... come up with the an...

A useful metaphor fo... a map: once you kno... are going (the goal) ... are (the reality), you can explore possible ways of making the journey (options) and choose the best action or approach (way forward).

(adapted from "Coaching for Performance" by John Whitmore, 1996)

2. Reality:
Where are

...forward:
Which option
is the best
approach?

i Further information

Further information

- **Manager as Coach: A Good Practice Guide** contains more information about the elements and benefits of coaching.

- **Providing Quality Feedback: A Good Practice Guide** contains information about giving and receiving feedback.

- **Contact your local PTC Business Partner**

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Performance Development & Management Guidelines

Reaching far...

Managing exceptional performance

Managing exceptional performance supports and motivates the staff member to continue to exceed performance expectations.

Managing exceptional performance

↓

Reward and **Recognition** and **Motivation**
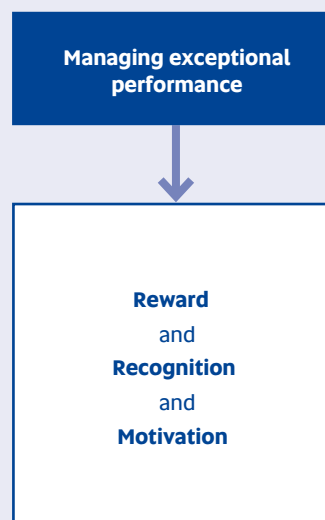
What needs to be done when managing exceptional performance?

The staff member and their manager:

- provide each other with feedback about how and where the staff member's performance is exceptional against the achievement of the agreed outcomes;

- make notes of progress towards achieving the agreed outcomes, specifically highlighting details of exceptional work for discussion at the formal review meetings; and

- meet on a regular basis.

In addition, the manager needs to:

reward and **recognise** and **motivate**

the staff member to support them to continue to exceed performance in one or more aspects of their performance.

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PDM

Performance Development & Management Guidelines

Some tips about rewarding, recognising and motivating staff

- Get to know your staff and ask them what drives them, how they like to be recognised and what will inspire them to foster performance excellence.

- Show your appreciation for the contributions your staff make.

- Incorporate positive feedback for achievements into your everyday practice.

- Listen closely to your staff so that you have a good understanding of what they need.

- Be fair and consistent when recognising staff.

- A variety of rewards (both financial and non-financial) can be considered where appropriate to recognise performance excellence.

- Make sure others are aware of your staff successes by nominating them for appropriate award.

ⓘ Further information

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PDM
Performance Development & Management Guidelines

*Some tips about rewarding, recognising
and motivat...*

- *Get to know your...
  recognised and w...*

- *Show your apprec...*

- *Incorporate positi...*

- *Listen closely to y...
  they need.*

- *...*

- *A variety of rewards (both financial and non-financial) can be considered
  where appropriate to recognise performance excellence.*

- *Make sure others are aware of your staff successes by nominating them for
  appropriate award.*

Further information

- **Providing Quality Feedback: A Good Practice Guide** contains information about giving and receiving feedback.

- **Manager as Coach: A Good Practice Guide** contains information about the elements and benefits of coaching

- **Motivation and Reward @ UniSA: A Good Practice Guide for Supervisors** provides an overview of key motivation theories, tips on application in the workplace, including current UniSA reward and recognition mechanisms.

- Contact your local PTC Business Partner.

ⓘ Further information

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Performance Development & Management Guidelines

Enhancing the Workplace...

Managing performance that meets expectations

Managing performance that meets expectations supports the staff member to:

- maintain current performance levels; and
- exceed performance expectations.

Managing performance that meets expectations

↓

Recognition
and
Motivation

What needs to be done when managing performance that meets expectations?

The staff member and their manager:

- provide each other with feedback about how the staff member's performance is tracking towards the achievement of the planned outcomes;
- make notes of progress towards achieving the planned outcomes for discussion at the formal review meetings; and
- meet on a regular basis.

In addition, the manager needs to:

recognise and **motivate**

the staff member to support them to continue to meet performance expectations and to assist them exceed performance expectations where possible.

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PDM

Performance Development & Management Guidelines

Some tips about recognising and motivating staff

- *Get to know your staff and ask them what drives them and how they like to be recognised;*
- *Show your appreciation for the contributions your staff make;*
- *Incorporate positive feedback for achievements into your everyday practice;*
- *Listen closely to your staff so that you have a good understanding of what they need;*
- *Be fair and consistent when recognising staff; and*
- *Make sure others are aware of your staff's successes by nominating them for appropriate awards.*

ⓘ Further information

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Performance Development & Management Guidelines

Some tips about recognising and motivating staff

- Get to know you... recognised;

- Show your apprec...

- Incorporate positi...

- Listen closely to y... they need;

- Be fair and consis...

- appropriate awards.

Further information

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- **Contact your local PTC Business Partner**

i Further information

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Performance Development & Management Guidelines

Helping lift performance...

Lifting Performance

Lifting performance supports a staff member to lift those areas of their performance that have not met expectations and prevents the need to move to the formal Managing for Performance Improvement process.

Lifting performance

*
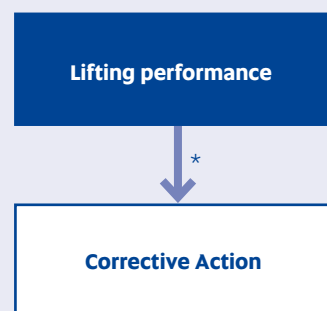
Corrective Action

* the move to corrective action is only applicable when there is continued performance that requires lifting

What needs to be done when performance needs to be lifted?

The manager:

- identifies with the staff member those aspects of their performance that have not met expectations; and

- supports the staff member improve their performance.

The staff member and their manager:

- meet formally on a regular basis to specifically discuss those areas of performance that do not meet expectations;

- provide each other with informal feedback about how the staff member's performance is tracking towards the achievement of the planned outcomes;

- make notes of progress towards achieving the planned outcomes for discussion at the formal review meetings; and

- continue to meet on a regular basis to discuss all other areas of the staff member's performance.

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PDM

Performance Development & Management Guidelines

Factors affecting performance

It is important for the staff member and manager to explore the reasons why the staff member's performance is below expectations. It will generally fall into one of three areas:

(adapted from "The missing opportunity in organisational research: some implications for a theory of work" by Blumberg and Pringle, 1982)

Component	Elements	Influences
Capacity	• skills • abilities • expertise • knowledge	• experience • education • training
Willingness	• motivation • desire to perform • personal issues	• personal factors • feedback and recognition • inappropriate workplace behaviour • job design • autonomy
Opportunity	• resources • equipment • management support	• access to equipment • other support resources • organisational structure • organisational environment • organisational culture • access to supervision

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PDM

Performance Development & Management Guidelines

> **Key things to remember about Lifting Performance and the PDM process:**
>
> - *The usual PDM process runs parallel to the lifting performance process. This means that:*
>   - *all of the performance outcomes that are meeting or exceeding expectations are detailed in the staff member's performance plan; and*
>   - *the action plan only details the actions for those performance outcomes that do not meet expectations.*
> - *If a staff member refuses to sign the Lifting Performance Action Plan, the manager is to notate this on the Action Plan and seek further advice from their local PTC team. Where appropriate, the local PTC team may seek advice from the PTC Unit.*

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PDM

Performance Development & Management Guidelines

Steps to lift performance

Stage One: Lifting Performance

It is identified that the staff member needs to lift their performance *

↓

Immediate conversation to find out what is happening (eg is everything ok? Whyis this work late?)

↓

Followup the conversation with an email which summarises the conversation between the staff member and their manager.

↓

If performance issue(s) that have alreadybeen identified (above *) continue(s) withina reasonable timeframe...

↓

Invite (in writing) the staff member toa meeting to discuss identified performance issue(s).
The invitation must contain the following information:

✓ Purpose of the meeting (eg concerns about lateness/qualityof work)
✓ Advice that this meeting is nota formal meeting
✓ Time, date and location of the meeting
✓ The staff member maybringa support person which mayincludea union representative, to the meeting

↓

The staff member and their manager meet to jointlyexplore the reasons for performance being below expectations and the solutions to lift performance to the expected level. The staff member needs to be given an opportunity to respond to the claim that performance is below expectations.

↓

Asa result of the discussion at the meeting, an Action Plan is developed and documented to support the staff member to lift their performance (this is NOTa Performance Improvement Plan).
The Action Plan contains:

✓ What areas of performance need to be lifted
✓ What the expected standards of the performance are
✓ When the staff member and their manager will meet again to reviewperformance
✓ What support is required to lift the staff member'performance

↓

Following discussion with local PTC team, if performance issues(s) continue(s)...

↓

Move to Stage Two: Managing for Performance Improvement

▶ **ENLARGE FLOWCHART**

When the performance improves, document and move out of the "lifting performance" stage.

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PDM

Performance Developm

Steps to lift performance

Stage One: Lifting Performance

It is identified that the staff member needs to lift their performance *

↓

Immediate conversation to find out what is happening (eg is everything ok? Why is this work late?)

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Follow up the conversation with an email which summarises the conversation between the staff member and their manager.

↓

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The invitation must contain the following information:
- ✓ Purpose of the meeting (eg concerns about lateness/quality of work)
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- ✓ Time, date and location of the meeting
- ✓ The staff member may bring a support person which may include a union representative, to the meeting

↓

The staff member and their manager meet to jointly explore the reasons for performance being below expectations and the solutions to lift performance to the expected level. The staff member needs to be given an opportunity to respond to the claim that performance is below expectations.

↓

As a result of the discussion at the meeting, an Action Plan is developed and documented to support the staff member lift their performance (this is NOT a Performance Improvement Plan).
The Action Plan contains:
- ✓ What areas of performance need to be lifted
- ✓ What the expected standards of the performance are
- ✓ When the staff member and their manager will meet again to review performance
- ✓ What support is required to lift the staff member' performance

↓

Following discussion with local PTC team, if performance issues(s) continue(s)…

↓

Move to Stage Two: Managing for Performance Improvement

PDM

Performance Development & Management Guidelines

Some tips to lift performance

· *Addressing any issues early will enable performance to be lifted more successfully.*

· *The reasons why performance is below expectations should be explored in an open and constructive manner.*

· *The staff member and their manager can use the GROW coaching method to lift performance:*

1. Goal:

What problem is impeding your achievement of your goal?

4. Way forward:

Which option is the best approach? Implement an action plan to resolve performance gap. After a reasonable period, assess the outcome of the action plan implementation.

2. Reality:

Where are you now? What is causing the problem?

3. Options:

Explore options to resolve the performance gap.

Reality:

Goal:

Options:

Way forward:
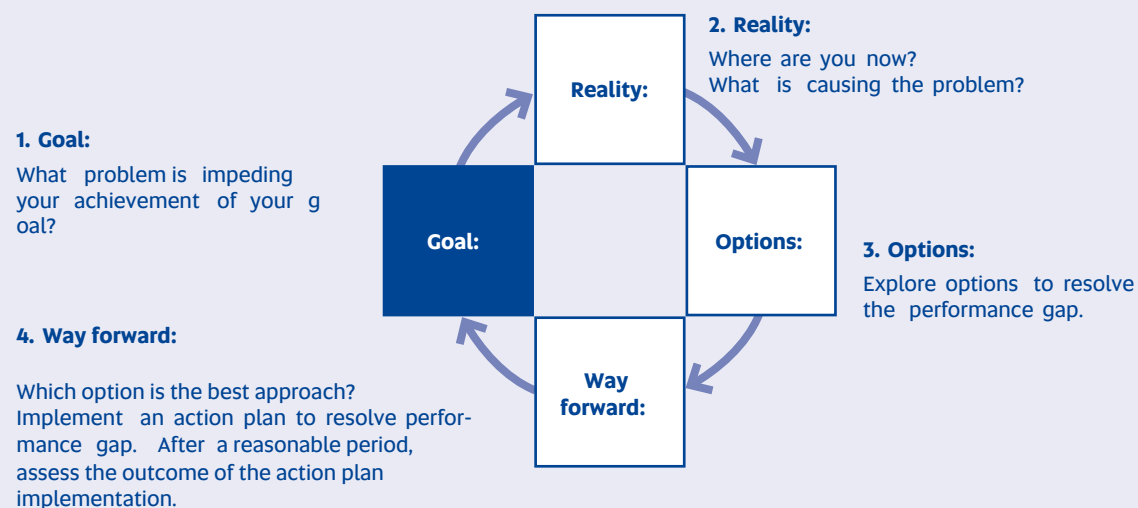
(adapted from "Coaching for performance" by John Whitmore, 1996)

It is strongly recommended that your local PTC Business Partner team is advised that the lifting performance process has commenced.

i Further information

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Performance Development & Management Guidelines

Some tips to lift performance

· Addressing any issues early will enable performance to be lifted more successfully.

· The reasons wh[...] an open and co[...]

· The staff member [...] to lift performanc[...]

It is strongly recommended that your local PTC Business Partner team is advised that the lifting performance process has commenced.

ⓘ Further information   ☒

- The **Performance Improvement Discussion Questions** provides some possible solutions for why a staff member's performance may not be meeting expectations

- **Providing Quality Feedback: A Good Practice Guide** contains information about giving and receiving feedback.

- **Manager as Coach: A Good Practice Guide** contains information about the elements and benefits of coaching

- **Contact your local** PTC Business Partner

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1. Goal:

What problem is impeding your achievement of your goal?

Goal:

Options:

3. Options:

Explore options to resolve the performance gap.

4. Way forward:

Which option is the best approach? Implement an action plan to resolve performance gap. After a reasonable period, assess the outcome of the action plan implementation.

Way forward:

(adapted from "Coaching for performance" by John Whitmore, 1996)

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Performance Development & Management Guidelines

If performance continues to be below expectations...

The flowchart on the following page outlines the steps that need to be followed if it is identified that a staff member's performance is below expectations.

Stage one: lifting performance

> Exists to support the staff member to lift those areas of their performance that have not met expectations to prevent the need to move to the formal managing for performance improvement process.

Stage Two: Managing for Performance improvement

> The commencement of formally managing performance that is below expectations. Please refer to the Managing for Performance improvement Guidelines.

Stage Three: Disciplinary action for unacceptable Performance

> Invoked when performance continues to be below expectations. It is only instigated in accordance with the applicable industrial instrument following consultation with the PTC Unit.

i Further information

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Performance Development & Management Guidelines

If performance continues to be below expectations...

The flowchart on the following page outlines the steps that need to be followed if it is identified that a staff member's performance

Stage One: Lifting performance

Exists to support the staff member lift those areas of their performance that have not met expectations to prevent the need to move to the formal managing for

i **Further information**

- Managing for Performance Improvement Guidelines
- Applicable industrial instrument
- **Contact your local PTC Business Partner**

⊠

is below expectations.
ent Guidelines.

Stage Three: Disciplinary Action for Unacceptable Performance

Invoked when performance continues to be below expectations. It is only instigated in accordance with the applicable industrial instrument following consultation with the **PTC** Unit.

i Further information

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Performance Development & Management Guidelines

The following flowchart outlines the steps that need to be followed when it is identified that a staff member's performance needs to be lifted. Please refer to the relevant Guidelines for detailed information about what needs to happen at each stage.

▶ **FLOWCHART**

▶ **NEXT SECTION: MPI GUIDELINES**

PDM

Performance Development

The following flowchart outlines the steps that need to be followed when it is identified that a staff member's performance needs to be lifted. Please refer to the relevant Guidelines for detailed information about what needs to happen at each stage.

▶ **FLOWCHART**

▶ **NEXT SECTION: MPI GUIDELINES**

Stage One:
Lifting Performance

Refer to PDM Guidelines for detailed information

It is identified that staff member needs to lift performance

Immediate conversation to find out what is happening and follow up discussion with email

If performance issue(s) continue(s)…

Formally invite staff member to meeting to discuss performance issue(s)

Conduct meeting and develop and document Action Plan to lift performance

Following discussion with local PTC professional, if performance issue(s) continue(s)…

Stage Two:
Managing for Performance Improvement

Refer to Managing for Performance Improvement Guidelines for detailed information

The steps in Stage One: Lifting Performance have been taken and performance issue(s) continue(s)

Manager contacts their local PTC Business Partner to seek confirmation that it is appropriate to move to the formal managing for performance improvement process

Formally invite the staff member to a meeting to discuss previously identified performance issue(s)

Conduct meeting and develop and document formal Performance Improvement Plan

Following discussion with PTC Unit, if performance issue(s) continue(s)…

Stage Three:
Disciplinary Action for Unacceptable Performance

Refer to appropriate industrial instrument

Refer to the PTC Unit for advice and support

When performance improves, document and move out of the relevant stage.

GUIDELINES

- Managing for Performance Improvement (MPI)
- Print-friendly version

PERFORMANCE DEVELOPMENT & MANAGEMENT

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Performance Development & Management Framework Guidelines

This guide has been developed to support managers and staff effectively and appropriately formally manage performance that is below expectations. In addition to this guide for performance improvement, staff and managers should refer to UniSA's Performance Development and Management (PDM) Guidelines.

What is managing for performance improvement?

Managing for performance improvement is a clearly defined process where the staff member and their manager work together to support the staff member improve their performance until it meets expectations.

The flowchart at the end of this guide provides a visual outline of the steps that need to be followed when it is identified that a staff member's performance needs to be lifted.

Stage one: Lifting Performance is where a staff member is supported to lift those areas of their performance that have not met expectations. This stage exists to prevent the need to move to the formal managing performance improvement process.

As soon as it is identified that a staff member's performance is not meeting expectations, it is important that they are made aware of this and the manager and the staff member work together to lift the staff member's performance. Quick action usually makes it easier to lift performance. Further information about this stage is described in the PDM Guidelines.

Stage Two: Managing for performance improvement is the commencement of formally managing performance that is below expectations. It can only be commenced if performance continues to be below expectations following a reasonable period of addressing performance concerns at stage one. Stage two is the focus of this guide.

Managing for improved performance should be a supportive, non-judgemental process. The aim is for the staff member and manager to continue to work together to improve performance until it meets expectations. It is also an essential step to take before any disciplinary action may occur.

Stage Three: Disciplinary action for unacceptable performance is invoked if performance continues to be below expectations following a reasonable period of addressing performance concerns during stage two. Disciplinary action for unacceptable performance is only instigated in accordance with the applicable industrial instrument. Refer to the PTC Unit for further information.

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Performance Development & Management Framework Guidelines

Roles

Everyone has a role in actively engaging in performance development and management.
If it has been identified that performance is not meeting expectations, then the staff member and the manager need to work together to lift the staff member's performance until it meets expectations. In particular:

Staff	• prepare for performance conversations with their managers; • have conversations with their manager to establish performance outcomes and development needs; • track and advise their manager about their progress towards achieving their performance outcomes; and • continuously strive to do the best they can.
Managers / Supervisors	• prepare for performance conversations with their staff; • have conversations with their staff to establish performance outcomes and development needs; • provide their staff with regular feedback (both informal and formal) about their staff's progress towards achieving their performance outcomes; • be fair and willing to assist staff; • have valid reasons and examples of areas of improvement; • provide reasonable opportunity to improve; and • support their staff to continuously strive to do the best they can.
Human resources	• integrate performance development and management into the daily operations of their work area; and • support staff and managers to enhance their performance.

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■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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Performance Development & Management Framework Guidelines

During this time it is important that:

- *the staff member is clear about the area(s) of their performance that is/are not meeting expectations;*

- *the staff member and the manager work together to identify why performance is not meeting expectations and to develop a plan to put actions and support in place so that performance can be lifted; and*

- *the staff member and manager provide each other with regular feedback (both informal and formal) to track performance.*

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■ **What is managing for performance improvement?** ■ **Roles** ■ **Factors affecting performance** ■ **Performance standards** ■ **Stage Two: Managing for performance improvement**

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Performance Development & Management Framework Guidelines

Factors affecting performance

It is important for the staff member and their manager to explore the reasons why the staff member's performance is below expectations. It will generally fall into one of three areas:

Capacity: the extent to which the staff member possesses the skills, abilities, expertise and/or knowledge required to effectively carry out the duties and responsibilities of the position. A staff member's capacity to perform may impact on the accuracy, timeliness and/or quality of the work produced.

Willingness: the extent to which a staff member wants or is motivated to, carry out their role and responsibilities effectively. A staff member's willingness to perform may be affected by a range of work or non-work related issues.

Opportunity: the extent to which a staff member is provided with the necessary means to perform effectively. These may relate to factors such as access to equipment or other tangible resources or to the extent to which necessary management support, communication or feedback occurs.

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■ What is managing for performance improvement?   ■ Roles   ■ **Factors affecting performance**   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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Performance Development & Management Framework Guidelines

The following table summarises the factors affecting performance and how these elements could be positively influenced:

All three components need to be present for good performance. Over-compensation in one component will not substitute for a shortfall in another.

Component	Elements	Influences
Capacity	• skills • abilities • expertise • knowledge	• experience • education • training
Willingness	• motivation • desire to perform • personal issues	• personal factors • feedback and recognition • inappropriate workplace behaviour • job design • autonomy
Opportunity	• resources • equipment • management support	• access to equipment • other support resources • organisational structure • organisational environment • organisational culture • access to supervision

(adapted from "The missing opportunity in organisational research: some implications for a theory of work" by Blumberg and Pringle, 1982)

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■ What is managing for performance improvement?   ■ Roles   ■ **Factors affecting performance**   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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UniSA Performance Development & Management

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Performance Development & Management Framework Guidelines

Performance improvement Discussion Questions

The following questions may stimulate discussion between the staff member and their manager:

What am I seeing? Areas to consider	Why might this be happening? Questions to ask (written here from the manager's perspective but equally questions for the staff member to reflect on)	What solutions might there be? (this is not an exhaustive list – there may be other useful suggestions raised by both the staff member and manager that are worth considering)
CAPACIT Y to perform • Skills &/or Knowledge gaps • Lack of confidence	• Do I need to revisit the induction process and ensure the staff member has the information they need to do the job? • Does the staff member understand how their work fits into the larger scheme of things? • Does the staff member know specifically what I need them to do – the expected outcomes, standards and behaviours? • Is the staff member confident in their ability to perform the tasks associated with achieving the expected outcomes? • How is the staff member's level of work organisation? Do they struggle with the 'unexpected' or competing priorities?	• Ask about their induction. Identify gaps and help to bridge them by sharing information and helping staff to make the necessary links. • Appropriate training or development in the specific skills or knowledge gaps. • 'Just in time' training for technical skills and make sure staff have the opportunity to apply the newly acquired skills as soon as possible. • Mentoring/coaching for ongoing personal effectiveness skills such as communication. • Hold a conversation to clarify expectations. • Set SMART (specific, measurable, achievable, relevant, time-bound) outcomes. • Make sure the manager regularly acknowledges the staff member's work and shows how much it is valued (including passing on feedback from others).

**WILLINGNESS
to perform**
 	
• Lack of motivation
 	
• Issues around
  team dynamics
   e.g. conflict
 	
• Personal issues
	• How is the design of the job? Is it giving enough variety, significance, autonomy, maximising use of staff member's skills and strengths?
	
	• Is there a work overload? This may be overwhelming the staff member. Does workload need to be reviewed?
	
	• Is there conflict in the team that is adversely affecting the staff member?
	
	• Am I providing enough recognition and feedback? How can I improve this?
	
	• Are there non-work related issues (that I may or may not be aware of) and are these impacting on the staff member's capacity to perform?
		• Review their role in conversation with the staff member, explore together how variety etc can be optimised.
		
		• Employee Assistance Program (EAP) support – could be 1:1 &/or team interventions.
		
		• Mediation to manage conflict that is identified.
		
		• EAP for 1:1 counselling to assist the staff member in coping with personal issues that are impacting performance.
		
		• Regular feedback and recognition as part of ongoing performance development and management.
		
		• Monitor the workplace culture for conflict issues and deal with them promptly.
		
		• Hold a career planning and development conversation – would a change of role/career re-stimulate the person's motivation?

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Performance Development & Management Framework Guidelines

What am I seeing? Areas to consider	Why might this be happening? Questions to ask (written here from the manager's perspective but equally questions for the staff member to reflect on)	What solutions might there be? (this is not an exhaustive list – there may be other useful suggestions raised by both the staff member and manager that are worth considering)
OPPORTUNITY **to perform** • Resources • Equipment • Information *(tip: this is the area over which a manager has the most direct influence so maximise this in a positive way. Regularly review these areas in collaboration with staff)*	• Is there something else about our systems of work (out of date or inefficient) that may be contributing to the staff member not meeting expectations? • Does the staff member have the appropriate equipment to do their job? • Does the staff member have the right people working with them to achieve outcomes? • Is the staff member getting access to the information they need to do their work? • Am I providing enough recognition and feedback? How can I improve this?	• Review work systems and/or processes in liaison with relevant staff. • Information-sharing and communication channels – who is getting what information/communication? Is anyone missing out? • Revisit structures – do we have the 'right' people working together? • Review workloads and equipment allocation. • Regular feedback and recognition as part of ongoing performance management processes.

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■ What is managing for performance improvement?   ■ Roles   ■ **Factors affecting performance**   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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Performance Development & Management Framework Guidelines

Performance standards

Action to address performance improvement should clearly indicate that the level of performance being delivered is not acceptable.

The minimum standards required of staff are outlined in the applicable industrial instrument. Further information about Academic standards can be found at the academic classification standards webpage.

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■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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UniSA Performance Development & Management

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Performance Development & Management Framework Guidelines

Stage One: Lifting Performance

Before moving to Stage Two: Managing for Performance Improvement, Stage One: Lifting Performance must be completed.

▶ **ENLARGE FLOWCHART**

(i) Further information

When the performance improves, document and move out of the "lifting performance" stage.

Stage One: Lifting Performance

It is identified that the staff member needs to lift their performance *

↓

Immediate conversation to find out what is happening (eg is everything ok? Why is this work late?)

↓

Followup the conversation with an email which summarises the conversation between the staff member and their manager.

↓

If performance issue(s) that have already been identified (above *) continue(s) within a reasonable timeframe...

↓

Invite (in writing) the staff member to a meeting to discuss identified performance issue(s). The invitation must contain the following information:
- ✓ Purpose of the meeting (eg concerns about lateness/quality of work)
- ✓ Advice that this meeting is not a formal meeting
- ✓ Time, date and location of the meeting
- ✓ The staff member may bring a support person which may include a union representative, to the meeting

↓

The staff member and their manager meet to jointly explore the reasons for performance being below expectations and the solutions to lift performance to the expected level. The staff member needs to be given an opportunity to respond to the claim that performance is below expectations.

↓

As a result of the discussion at the meeting, an Action Plan is developed and documented to support the staff member lift their performance (this is NOT a Performance Improvement Plan). The Action Plan contains:
- ✓ What areas of performance need to be lifted
- ✓ What the expected standards of the performance are
- ✓ When the staff member and their manager will meet again to review performance
- ✓ What support is required to lift the staff member' performance

↓

Following discussion with local PTC Business Partner, if performance issues(s) continue(s)...

↓

Move to Stage Two: Managing for Performance Improvement

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■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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Performance Develop

Stage One: Lifting Performance

- Before moving to Stage Two: Managing for Performance Improvement, Stage One: Lifting Performance must be completed.

▶ **ENLARGE FLOWCHART**

ⓘ Further information

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✓ When the staff member and their manager will meet again to review performance
✓ What support is required to lift the staff member' performance

↓

Following discussion with local PTC Business Partner, if performance issues(s) continue(s)...

↓

Move to Stage Two: Managing for Performance Improvement

■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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UniSA Performance Development & Management

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Performance Development & Management Framework Guidelines

Stage One: Lifting Performance

- Before moving to Stage Two: Managing for Performance Improvement, Stage One: Lifting Performance must be completed.

▶ **ENLARGE FLOWCH**

ⓘ Further information

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Stage One: Lifting Performance

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Immediate conversation to find out what is happening (eg is everything ok? Why is this work late?)

Follow up the conversation with an email which summarises the conversation between the staff member and their manager.

ⓘ **Further information**
- Performance Improvement Discussion Questions
- Contact your local **PTC Business Partner**

✓ Time, date and location of the meeting
✓ The staff member may bring a support person which may include a union representative, to the meeting

The staff member and their manager meet to jointly explore the reasons for performance being below expectations and the solutions to lift performance to the expected level. The staff member needs to be given an opportunity to respond to the claim that performance is below expectations.

As a result of the discussion at the meeting, an Action Plan is developed and documented to support the staff member lift their performance (this is NOT a Performance Improvement Plan).
The Action Plan contains:
✓ What areas of performance need to be lifted
✓ What the expected standards of the performance are
✓ When the staff member and their manager will meet again to review performance
✓ What support is required to lift the staff member' performance

Following discussion with local PTC team, if performance issues(s) continue(s)…

Move to Stage Two: Managing for Performance Improvement

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Performance Development & Management Framework Guidelines

Stage Two: Managing for Performance Improvement

The following flowchart provides a guide to support
a staff member improve their performance where
it has been identified that it has been below expectations.

▶ **FLOWCHART**

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■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ **Stage Two: Managing for performance improvement**

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Performance Development &

Stage Two: Managing for perf

The following flowchart provides a guide to support a staff member improve their performance where it has been identified that it has been below expectations.

▶ **FLOWCHART**

Stage Two: Managing for Performance Improvement

The steps in Stage One: Lifting Performance have been taken and the performance issue(s) continue(s) within a reasonable timeframe from initial identification.

Preparation

The manager contacts their local PTC Business Partner to advise that one of their staff member's performance is below expectations and to seek confirmation that it is appropriate to move to a formal managing for performance improvement process.

Formally invite (in writing) the staff member to a meeting to discuss identified performance issue(s). The invitation must contain the following information:

✓ Performance issue(s) have/has not improved so now moving to Stage Two: Managing for Performance Improvement

✓ Purpose of the meeting (eg concerns about lateness/quality of work)

✓ Advice that this meeting is a formal meeting

✓ Time, date and location of the meeting

✓ The staff member may bring a support person, which may include a union representative, to the meeting.

Performance Improvement Meeting and Plan

The staff member and their manager meet to jointly explore the reasons for performance being below expectations and the solutions to lift performance to the expected level. The staff member needs to be given an opportunity to respond to the claim that performance is below expectations.

As a result of the discussion at the meeting, a Performance Improvement Plan (PIP) is developed and documented to support the staff member to improve their performance. The Performance Improvement Plan (PIP) contains:

✓ What areas of performance is below expectations

✓ What the expected standards of performance are

✓ When the staff member and their manager will meet again to review performance

✓ What support is required to lift the staff member's performance

The difference between the Performance Improvement Plan and Action Plan (which is developed during Stage One: Lifting Performance) is that the former is formal.

Review

Following discussion with PTC Unit, if performance issues(s) continue(s)…

Move to Stage Three: Disciplinary Action for Unacceptable Performance

When the performance improves, document and move out of this stage.

■ **What is managing for performance improvement?**   ■ **Roles**   ■ **Factors affecting performance**   ■ **Performance standards**   ■ **Stage Two: Managing for performance improvement**

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Performance Development & Management Framework Guidelines

Further information about what needs to occur throughout this process is detailed in the table below.

It is important to remember that the usual PDM process runs parallel to the performance improvement process. This means that:

- all of the staff member's performance outcomes that are meeting or exceeding expectations are detailed in the staff member's performance plan;
- the Performance Improvement Plan (PIP) only details the actions for those performance outcomes that do not meet expectations;

- there will be two different types of formal meetings to discuss progress towards achieving performance outcomes:

1. at the *PDM meeting*, the staff member and their manager will discuss the staff member's progress towards achieving *all identified performance outcomes* that are meeting or exceeding expectations;

2. at the *performance improvement meeting*, the staff member and their manager will discuss the staff member's progress towards achieving the *performance outcomes* that have previously been identified as *not meeting expectations*.

PDM Meeting	Performance Improvement Meeting
Discuss: - Those performance outcomes that are meeting or exceeding expectations	*Discuss:* - Those performance outcomes that are not meeting expectations
Outcome: - PDM Plan	*Outcome:* - Performance Improvement Plan (PIP)

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■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ **Stage Two: Managing for performance improvement**

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Performance Development & Management Framework Guidelines

The following provides further information about the actions that need to be taken at each stage of the performance improvement process.

Preparation

Contact your local PTC Business Partner

The manager contacts the relevant PTC Business Partner to advise that one of their staff member's performance is below expectations and to seek confirmation that it is appropriate to move to a formal managing for performance improvement process. The progression to Stage Two is only appropriate if all the steps in Stage One: Lifting Performance have been taken and the performance issue(s) has/have continued within a reasonable time-frame from initial identification.

Invite staff member to formal meeting

The manager sets up a time to meet with the staff member to discuss those areas of performance that are not meeting expectations. The staff member must be notified the following information in writing:

- performance issue(s) have/has not improved so now moving to Stage Two: Managing for Performance Improvement;

- purpose of the meeting (eg concerns about lateness/quality of work);

- advice that this meeting is a formal meeting;

- time, date and location of the meeting; and

- the staff member may bring a support person, which may include a union representative, to the meeting.

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Performance Development & Management Framework Guidelines

Performance improvement meeting

Have the meeting

The manager and staff member meet to discuss those areas of performance that are not meeting expectations. These performance expectations must have been documented in the staff member's performance plan.

During this meeting:

- the manager explains to the staff member where performance improvements are required;

- the staff member must be given every opportunity to respond to and explain the reason for the manager's assessment that performance is below expectations;

- the staff member and their manager determine why performance is below expectations and identify the remedial actions (see below) that will be made to enable performance improvement (see Performance improvement Discussion Questions;

Examples of remedial action:

- » on-the-job or off-the-job training

- » coaching or mentoring by the manager or another suitable person

- » counselling using the Employee Assistance Program

- » close supervision

- » temporary or permanent re-arrangement of duties and responsibilities

- the manager and staff member clarify performance outcomes, agreed actions and timeframes that will be documented in a Performance improvement Plan (PiP);

- the manager and staff member agree when they will meet again to discuss progress towards the performance outcomes documented in the PIP; and

- the manager advises the staff member that a possible consequence of continued performance that is below expectations may be disciplinary action.

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■ **What is managing for performance improvement?**　　■ **Roles**　　■ **Factors affecting performance**　　■ **Performance standards**　　■ **Stage Two: Managing for performance improvement**

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Performance Development & Management Framework Guidelines

Performance Improvement Plan

If not during the meeting, then as soon as possible following the meeting, the Performance improvement Plan (PiP) should be finalised, either by the staff member or their manager (or as a joint effort), and signed by both parties.

The PIP must detail:

- What area of performance is below expectations;
- What the expected standards of the performance are;
- When the staff member and their manager will meet again to review performance; and
- What support is required to lift the staff member's performance.

If a staff member refuses to sign the PIP, the manager is to notate this on the PIP and seek further advice from the relevant PTC Business Partner. Where appropriate, the PTC Business Partner may seek advice from the PTC Unit.

Remember:

- the PIP only contains those performance outcomes that need to be improved.
- the performance plan, containing all of the other performance outcomes that the staff member needs to achieve which are meeting or exceeding expectations, runs in conjunction with the PIP.
- all performance outcomes need to be SMART (refer to PDM Guidelines);
- the time period for the achievement of the performance outcomes will be determined by the complexity of the improvement needed and the capabilities of the staff member.
  Ensure that this timeframe is reasonable and relevant to enable the staff member to improve their performance; and
- the staff member and their manager should each have a signed copy of the PIP.

Time to develop, support and improve

Following the performance improvement meeting and finalisation of the PIP:

- the identified actions must be undertaken; and
- the manager supports the staff member meet performance expectations as detailed in their PIP.

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■ **What is managing for performance improvement?**   ■ **Roles**   ■ **Factors affecting performance**   ■ **Performance standards**   ■ **Stage Two: Managing for performance improvement**

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Performance Development & Management Framework Guidelines

Review Performance

Specific and frequent feedback about how the staff member's performance is tracking must be given by the manager both informally and formally. It is also important for the manager to remember to document these discussions.

If the staff member is demonstrating difficulty in meeting performance expectations:

- the manager needs to speak to them immediately; and

- determine what additional assistance is required to meet the expectations in the agreed time.

The staff member and manager should meet within the agreed timeframe to assess whether performance has improved.

If performance has improved and is now meeting expectations:

- document this on the staff member's PiP; and

- the managing for performance improvement process ceases.

If performance continues to be below expectations:

- following consultation with the PTC Unit, move to Stage Three: Disciplinary Action for Unacceptable Performance.

i Further information

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■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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Performance Development & Management Framework Guidelines

Review performance

Specific and frequent feedback about how the staff member's performance is t... the manager both informally ... important for the manager to ... these discussions.

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- the manager needs to spec... and

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The staff member and manager should meet within the agreed timeframe to assess whether performance has improved.

If performance has improved and is now meeting expectations:

ⓘ **Further information**   ⊠

- **Performance Improvement Discussion Questions**
- **Performance Improvement Plan templates**
- **Performance Development and Management guidelines**
- **Applicable industrial instrument**
- **Academic classification standards**
- **Contact your local PTC Business Partner**

ⓘ Further information

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Performance Development & Management Framework Guidelines

The following flowchart outlines the steps that need to be followed when it is identified that a staff member's performance needs to be lifted. Please refer to the relevant Guidelines for detailed information about what needs to happen at each stage.

▶ **FLOWCHART**

▶ **NEXT SECTION: FACT SHEETS**

■ What is managing for performance improvement?   ■ Roles   ■ Factors affecting performance   ■ Performance standards   ■ Stage Two: Managing for performance improvement

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Performance Developme[nt]

The following flowchart outlines the steps that need to be followed when it is identified that a staff member's performance needs to be lifted. Please refer to the relevant Guidelines for detailed information about what needs to happen at each stage.
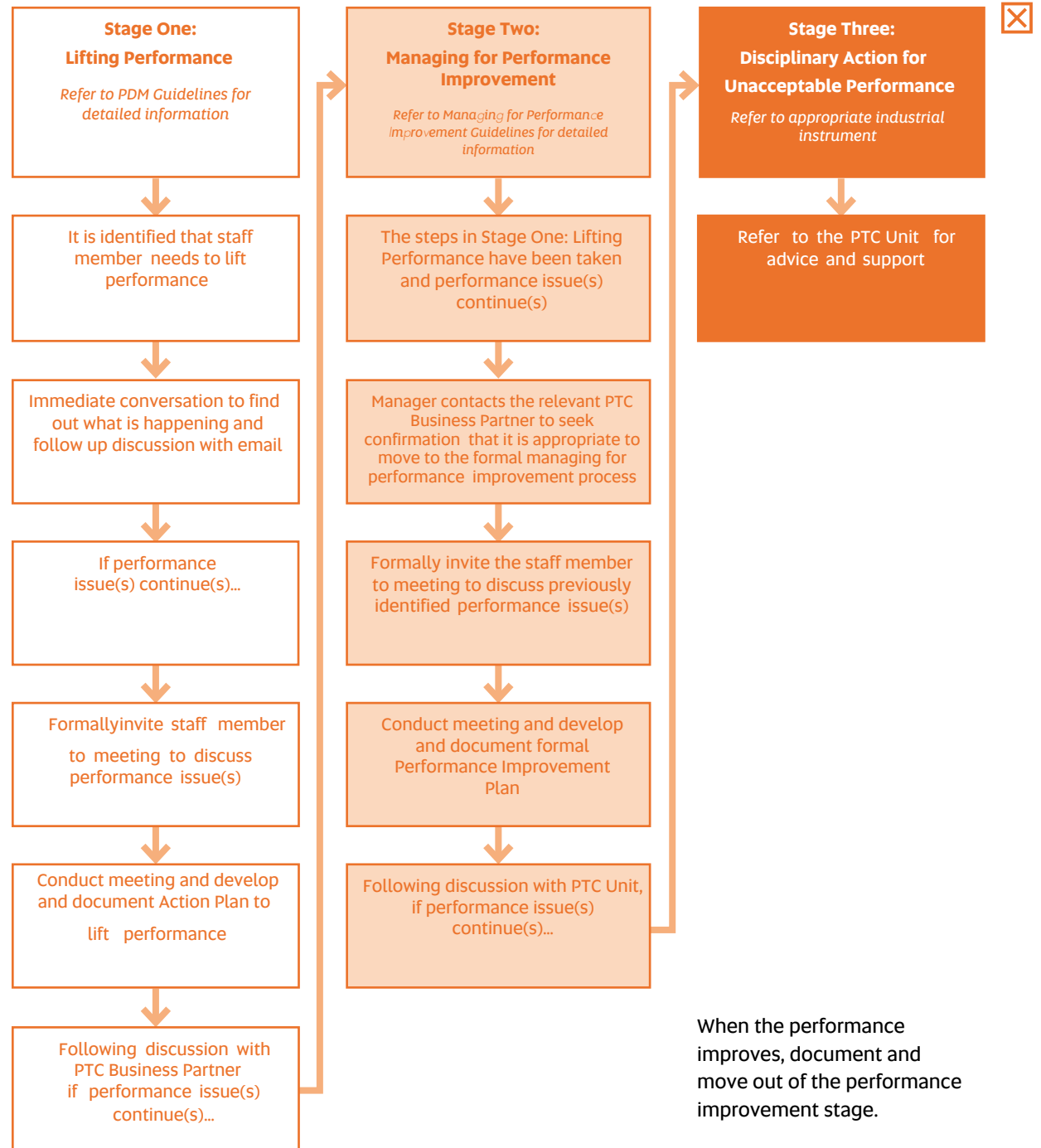
▶ **FLOWCHART**

**Stage One:
Lifting Performance**

Refer to PDM Guidelines for detailed information

↓

It is identified that staff member needs to lift performance

↓

Immediate conversation to find out what is happening and follow up discussion with email

↓

If performance issue(s) continue(s)...

↓

Formally invite staff member to meeting to discuss performance issue(s)

↓

Conduct meeting and develop and document Action Plan to lift performance

↓

Following discussion with PTC Business Partner if performance issue(s) continue(s)...

**Stage Two:
Managing for Performance Improvement**

Refer to Managing for Performance Improvement Guidelines for detailed information

↓

The steps in Stage One: Lifting Performance have been taken and performance issue(s) continue(s)

↓

Manager contacts the relevant PTC Business Partner to seek confirmation that it is appropriate to move to the formal managing for performance improvement process

↓

Formally invite the staff member to meeting to discuss previously identified performance issue(s)

↓

Conduct meeting and develop and document formal Performance Improvement Plan

↓

Following discussion with PTC Unit, if performance issue(s) continue(s)...

**Stage Three:
Disciplinary Action for Unacceptable Performance**

Refer to appropriate industrial instrument

↓

Refer to the PTC Unit for advice and support

When the performance improves, document and move out of the performance improvement stage.

FACT SHEETS

- Performance Conversation
- Feedback
- Stage 1: Lifting Performance
- Stage 2: Performance Improvement

PERFORMANCE
DEVELOPMENT
& MANAGEMENT **PDM**

TEMPLATES

- Prepare for the Performance Conversation Self-Reflection (Academic staff)

- Prepare for the Performance Conversation Self-Reflection

- Summary of Performance Conversation (PDM Plan – Academic staff)

- Summary of Performance Conversation (PDM Plan)

- Summary – Performance Development & Management

- Stage 1: Summary of Lifting Performance Conversation

- Stage 2: Summary of Managing for Performance Improvement Conversation

- Stage 1: Lifting Performance Case File Sheet

- Stage 2: Managing for Performance Improvement Case File Sheet

PERFORMANCE
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PDM References

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