**HR Services**

Performance review plan – professional employees

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| My name:  Position: |  |
| My Manager’s name:  Position: |  |
| My work unit: |  |
| Date: |  |

**Opening points:**

* How has the past 12 months been for you? Positive and challenging aspects?
* What do you enjoy about your role and working in our team?
* Is there anything specific you want to make sure we address today?

**Discuss, reflect and give feedback:** *Remember to refer to attachments at the back of the form & your previous priorities/goals as you go. Expect to discuss your performance in the below areas, considering whether it is achieving expectations, exceeding expectations or requires some improvement.*

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| **Achievements in past 12 months**   * Review priorities/goals for the past year * Highlight good outcomes, discuss any obstacles or challenges for any goals not met * Discuss overall performance and development in relation to core job responsibilities | **Continuous improvement & Client service**   * Discuss new ideas, processes or initiatives you have been part of * How have you supported developing and improving services to clients? |
| **Values and behaviour** *(see attached)*   * Discuss how you are demonstrating our values in your role * Are there any values you don’t understand or could better demonstrate? | **Leadership – if applicable** *(see LCF attached)*   * Discuss your capabilities against the framework * Strengths & challenges when managing people? * Development/training attended to further leadership capability? |

**Key messages and outcomes:** *use the space below to capture the key points of your discussion. A few brief sentences should be plenty, and ideally try to capture these as you go.*

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**Career development & planning**

*Career plans don’t have to be about moving up or big changes – loving your job and doing great work every day are perfectly fine too. Consider the types of career options below and what might match your plans for the future.*

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| **Career options** | **Sample goals** | **Career options** | **Sample goals** |
|  | * Internal secondment * Explore a new career direction within the organisation * Deliberately expand network, research other areas of interest within the organisation |  | * Participate in corporate projects to identify new opportunities * Learn from people who have achieved in your organisation * Review your skills in light of future expectations |
|  | * Improve work relationships * Expand professional networks * Obtain feedback about better leveraging talents/strengths * Strengthen performance, process improvement |  | * Consult with someone who has moved down and discovered the benefits involved * Discuss your thoughts and preferences with a mentor * List the benefits that a downward move could provide that your current position does not |
|  | * Reskill, retrain, upgrade skills * Express interest in temporary relief in a higher position * Seek out a mentor from a higher level |  | * Identify your skills and experience * Identify key people that could benefit |

**Discuss:**

* What development or training did you complete in the last 12 months?
* What was the impact or outcomes of those activities?
* What development activities will best support your career plans?

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| **My current career plans:** | **The skills or opportunities I need to meet my career plans:** |
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| **Training, actions and timeframes to address training needs, skills gaps and development opportunities:** | |
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**Work goals for next 12 months – relevant to your role and the plans and needs of your work unit**

* *Are you aware of SCU’s Strategic Goals and our work unit’s operational plan? Use these to think about your role and priorities for the year ahead*

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| **My top 5 Goals**  *Use SMART goals (Specific, Measurable, Achievable, Action Oriented, Realistic and Time frame) to guide you and show what achievement of these priorities will look like* | **12 month review**  *Was goal achieved?*  *Why or why not?* |
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**Supervisor support**

* Is there anything your supervisor can do to help you in your role and with your 12 month goals e.g. feedback, communication, direction, mentoring?

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| **Six month “check in” comments** (it is best practice to have an informal check in 6 months after you set your objectives. It is recommended you make a plan to check in as appropriate to your role and needs – use this space to capture any feedback if and when you have that conversation) |

**Leave planning**

* Do you have any plans to take extended leave in the next 12 months?
* 4 weeks Annual Leave should be taken annually. Discuss current AL balance. When do you plan to clear 4 weeks this year?

**Position description**

* Does the current position description for your role need updating?

**Outside work**

In line with our [Outside Work Policy](http://policies.scu.edu.au/view.current.php?id=00042), professional staff engaging in outside work (as defined) must have had such work approved by their supervisor

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| **Did you undertake any outside work in the past 12 months?**  *Please provide details and attach a copy of the approval application* |  |
| **Do you plan to engage in any outside work in the next 12 months?**  *Please provide details and ensure an application is submitted for approval* |  |

**Summary – end of year:** *after you have discussed reflections of the previous year, your training and development needs and set your goals for the next 12 months, capture the summary of your discussion about the past year and plans for the future.*

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| Employee’s comments: |
| Signature: Date: |

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| Supervisor’s feedback & summary: |
| Signature: Date: |
| [Sep17] |

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| **SCU** [**Purpose**](https://www.scu.edu.au/about/purpose-and-values/)  Changing lives through revolutionary learning and research with real impact  **SCU** [**Strategic Priorities**](https://www.scu.edu.au/about/purpose-and-values/)  Education and student experience  Create outstanding student outcomes through our revolutionary Southern Cross Model and a seamless student journey  Research and impact  Deliver transformative research that makes a real impact locally, regionally and globally​  Engaged communities and partners  Engage with our alumni, partners, and communities across all that we do to harness collaboration  Outstanding people  Invest in the development of our people, empowering them to live our values​  Financial security  Consistently deliver financial results that enable us to sustainably invest for excellence and growth.  Digital transformation  Transform our digital and analytics capabilities to deliver outstanding digital experiences​  Reimagined campus  Invest in modern, flexible spaces that promote collaboration, community and environmental sustainability    **SCU** [**Values**](https://www.scu.edu.au/about/purpose-and-values/)   |  |  |  |  |  | | --- | --- | --- | --- | --- | | We strive for excellence.  We apply the highest standards.  We’re always seeking to be at our best. | We are bold.  We’re ambitious.  We’re dynamic.  We make bold decisions. | We care.  We care for our people.  We champion our communities.  We respect our planet. | We own it.  When we commit, we keep our word.  When we fail, we learn. | We build trust through action.  We tell the truth.  We do what’s right. | | | |
| **LEADERSHIP CAPABILITY FRAMEWORK** | | | |
| Image result for mirror reflection | **Leading by knowing self and others**   * You are self-aware and reflective * You self-manage your time and   work/life balance   * You are committed, decisive and   resilient   * You show flexibility and responsiveness | **You demonstrate this by –**   * Knowing your own strengths and limitations * Learning from experience and changing approaches when necessary * Being authentic in your actions and words * Being open to feedback on your behaviour and performance | |

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| [Image result for Leading teams](https://www.google.com.au/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjOyNa4tPfQAhVGWLwKHX0vCG0QjRwIBw&url=https://jwalexander71.wordpress.com/&psig=AFQjCNHW4nYI_B1vrPXGNCpyQeErk4lZTg&ust=1481932883327754) | **Leading and developing people and**  **teams to achieve results**   * You develop and lead people and teams for high performance * You communicate clearly and   persuasively   * You listen and read the situation | **You demonstrate this by –**   * Leading by example * Creating a work environment in which people are motivated and engaged with SCU goals * Identifying and supporting relevant learning opportunities for people and teams * Proactively and consistently managing performance of others * Positively influencing people's behaviour and decisions * Developing and using networks to solve workplace issues * Negotiating persuasively and presenting a coherent and convincing argument * Listening and responding effectively * Adapting communication style to suit the audience and issue * Anticipating and managing conflict |
| [Image result for leading change](http://www.google.com.au/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjEs__6tffQAhXBU7wKHU5oAigQjRwIBw&url=http://www.advancement.cc/blog/2014/05/08/8-Steps-to-leading-change-successfully-Part-1.aspx&psig=AFQjCNH7VlahZvsGoscmps_IqJ10hdnSQA&ust=1481933258231233) | **Leading vision, change and**  **innovation**   * You define, embrace and achieve the vision * You lead people through change * You create and lead a performance culture * You foster innovation in others | **You demonstrate this by –**   * Thinking strategically, analysing opportunities, identifying gaps and making decisions for the long term * Communicating vision clearly and consistently * Fostering acceptance of change through positive behaviour * Demonstrating commitment to managing change * Understanding there are different reactions to change and provides appropriate support * Facilitating a performance culture to support SCU’s vision and strategic goals * Building formal and informal systems to encourage and recognise performance * Creating the environment, systems and processes to encourage and foster innovative thinking * Celebrating successes and recognises excellence and effort |
| [Image result for managing operations](http://www.google.com.au/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjRxufUtvfQAhUCe7wKHcWkAEEQjRwIBw&url=http://www.assignmentpoint.com/business/management/supply-chain-management-of-british-american-tobacco-bangladesh.html&psig=AFQjCNExzt4jhrOwrN88l5p9Wmnmy0diXQ&ust=1481933497197418) | **Leading and managing SCU’s**  **operations**   * You manage resources, information   and projects   * You collaborate | **You demonstrate this by –**   * Allocating resources efficiently and ethically * Managing information, projects and risks within best practice frameworks * Working effectively, sharing knowledge, information and resources across organisational boundaries * Recognising and drawing on strengths of others * Exploring and developing productive internal and external linkages to support SCU’s strategic direction |

**TRAINING & DEVELOPMENT PLANNING**

**Options to consider with your manager**

**You can access more information about training at the online Professional Learning Centre and register for sessions via MyHR.** We constantly review and develop new training programs too, so be sure to always check what might be coming up and read emails from the HR Services team about new programs when they become available.

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| For everyone:  essential to attend | Work health & safety:  attend where relevant | For supervisors & managers:  attend where relevant |
| Performance Review and Planning Essentials for Staff | **Senior First Aid**  (First Aid Officers) | **Performance Review and Planning for Supervisors** |
| Cultural Competency | **Emergency Warden Training**  (Fire Wardens) | **WHS Risk Management for Managers and Supervisors** |
| Courageous Conversations about Race | **Manual Handling**  (Facilities Staff, others where relevant) | **Critical Conversations and Conflict Resolution** |
| Respectful Workplace | **Chemical Spill Training** (Technical Staff) | **Staff Selection and Interview Skills** |
| Responding to Disclosures of Sexual Violence | **Radiation Safety Training** (Technical Staff) | **See also:** Leadership Framework training & development |
|  | **Dangerous Goods Training** |  |
|  | **Health & Safety Representative Training** |  |