

Achievement Review and Professional Development Procedure

1. Policy Title

Achievement Review and Professional Development Policy

2. Preamble

A key priority of Carclew is to manage the business of the organisation to the highest industry standards. By encouraging and supporting the continuing professional development of its staff is assisting to the contribution of this commitment.

Through reflection, feedback and discussion, staff achievement and professional development reviews supports the career development of staff and aims to:

- Create an opportunity for a two-way reflection of work outcomes;
- Recognise and review the past year's achievements of the employee;
- Clarify any changes to the employee's role;
- Plan for the coming year and identify goals;
- Equip individuals to meet the immediate and future challenges of their position;
- Assist individuals to achieve their goals and those of the Organisation; and
- Provide guidance on career development.

3. Definitions

Professional Development: Organised personal, career and/or professional training which contributes to the staff member's ability to undertake their role in an effective and satisfying manner and which leads to career and personal enrichment.

Work Based Learning: Structured learning managed by an organisation and focused on learning through work.

Review Cycle: The period of time which the review occurs.

Self-directed learning: The method used when a learner, rather than an institution, controls both the learning objectives and the means of learning. It is a continuous process, often informal, and an important factor in lifelong learning.

4. Achievement Review and Professional Development Process

The following procedures will assist supervisors/managers and staff to undertake annual reviews in accordance with the staff review framework. Specific matters covered in these procedures are expanded in more detail, and brought into operation, by the template provided for the annual meeting.

Carclew's review system consists of four basic stages. These stages are:

- Setting clear goals/targets
- Doing the work
- Reviewing and reflecting on how the work went against the goals/targets
- Setting new goals/targets

4.1 Who is involved?

- All staff will participate in an annual staff achievement review.
- Supervisors/managers will be responsible for conducting the review, unless an alternative reviewer has been arranged. Employees can request that a third person be involved in the review process, however, ordinarily there will be no third party involvement.

4.2 When and how does it happen?

- Carclew expects that every staff member has a clear understanding of their role and priorities/goals. For new staff this will be clarified during the induction process. For current staff this may be defined at the first annual discussion.

- Meetings will be held annually and are arranged by the supervisor/manager, for a time most convenient to staff and supervisor/manager.
- The annual process should then be ongoing with regular feedback to the staff. Supervisors/managers are encouraged to engage in informal 'follow up' in which expectations and needs are discussed.

4.3 Scheduling the meeting

- The supervisor/manager is responsible for scheduling the review with the staff member. The meeting will be held at Carclew, unless otherwise agreed and arranged by both supervisor/manager and staff member.

4.4 Prior to the meeting

- One week prior to the meeting the supervisor/manager will forward the review template to the staff member to allow each adequate time for preparation. The majority of the template is completed by both the staff member and supervisor/manager during the meeting, not prior to the meeting, as Carclew's appraisal process concentrates on the discussion between staff member and supervisor/manager.

4.5 The meeting

- The supervisor/manager will meet with the staff member at the arranged time and location. Both supervisor/manager and staff member will discuss and work through the template. The review is about the discussion and gaining a shared understanding of what has to be done, how is it to be done, how you know that it has been done successfully, the strengths, challenges and interests of the team member, and a discussion around barriers and areas for improvement.

4.6 Record keeping

- A record of the outcomes of the planning and development discussions will be kept, however, all documentation relating to the planning and development review process is strictly confidential to the staff member and the person conducting the discussion. In situations where the reviewer is not the supervisor/manager, the recommendations for staff development action will be reported to the supervisor/manager in a format agreed by the staff member and will remain confidential to the supervisor/manager.
- In particular, agreements about work assignments, proposed revisions to duty statements, and plans for professional development activities should be noted on the appraisal summary sheet.
- Staff achievement reviews must be signed by both the supervisor/manager and staff member.
- The original copy will be placed on the employee's personnel file, kept in the Administrative Office.
- A signed copy of the record will be given to the staff member.

4.7 Concerns about progression

- Concerns about a staff member's progression and/or conduct should be addressed by the supervisor/manager as soon as possible and not held over to the review. In the first instance concerns should be managed by a supervisor/manager through a process of structured counselling. This provides an opportunity for the resolution of the concerns within an agreed time-frame through clarification of expected objectives and productivity standards, regular feedback and where appropriate, further training.
- Advice may be sought from the Manager, Finance & Operations and Chief Executive, as appropriate.
- If after following this process, a supervisor/manager remains concerned about the staff member's productivity the relevant disciplinary processes may need to be invoked. In this case, advice should be sought from the Manager, Finance & Operations and Chief Executive.

5. Legislation

The South Australian Public Sector Act 2009

South Australian Public Sector Employees Code of Conduct March 2009

Commissioner for Public Employment Ethical Conduct Guideline 2001

Achievement Review and Professional Development Policy

Grievance Policy & Procedures

Code of Conduct and Duty of Care Policy

6. Additional Information

6.1 Overall general achievement comments

- Excellent achievement: Always carries out duties at an outstanding level in the key outcome area, delivering to the required standard and adding value with innovation, initiative and/or excellence. Achievements can be recognised through training and development opportunities.
- Satisfactory achievement: Consistently completes tasks at the required standard in the key outcome area. Achievements can be recognised through training and development opportunities.
- Required Standard: when a member of staff is operating at an efficient and competent level, thereby positively contributing to mission and goals of the area.
- Needs assistance: Inconsistent in executing tasks at the required standard, leading to occasional errors in achieving the key outcome area. Output can be improved with coaching, training, actions plans and/or review.
- Unsatisfactory achievement: Does not complete tasks at the required standard, regularly falling below the expected minimum in the key outcome area. Immediate developmental need apparent.

6.2 Administration achievements comments *

- Creates and/or maintains effective record systems;
- Does not involve management in necessary or unnecessary administrative details;
- Is skilled or needs work with carrying out routine records management tasks;
- Gives attention to business needs with regards to records management.

6.3 Communication skills comments *

- Excels, satisfactory or needs work with effective, positive and/or constructive communication skills;
- Ensures meetings are action-oriented;
- Is an empathetic, caring, and/or attentive listener;
- Communicates effectively with co-workers, staff, supervisor/manager, clients and/or the media.

6.4 Creativity achievement comments *

- Demonstrates creative problem solving/troubleshooting/communication skills;
- Is open and receptive to feedback and/or ideas from management;
- Shows willingness, ability and/or frustration with/to change;
- Nurtures new and/or positive ideas creativity.

6.5 Improvement achievement comments *

- Looks ahead for continuous improvement;
- Uses constructive criticism effectively and appropriately;
- Creates and/or meets goals for improvement of targets;
- Shows increased or diminished potential for advancement or improvement.

6.6 Interpersonal skills comments *

- Excels or shows promise with other staff, managerial or supervisory relations;
- Reviews and/or recognises the needs of others during routine and/or special projects;

- Understands how to create and/or nurture positive working relationships with coworkers, clients and/or management;
- Promotes harmony, communication, understanding, knowledge and/or policy appropriately.

6.7 Leadership achievement comments *

- Is a natural, intuitive, strong, confident and/or respectful leader;
- Inspires, demands and/or creates respect and/or confidence amongst their peers;
- Demonstrates natural ability to gain the support of clients, supervisors/managers and coworkers;
- Shows appreciation for other staff member contributions regularly and/or repeatedly;
- Has become a powerful or invaluable asset to the company and/or team.

6.8 Professionalism achievement comments *

- Seeks out, develops and/or maintains the necessary background, skills or knowledge to stay on top of professional requirements and/or relationships;
- Able to create long-lasting professional relationships that benefit the organisation;
- Verbal and/or written communication skills demonstrate professionalism;
- Projects an air of professionalism, authority and/or poise with all or some business relationships.

6.9 Stress management comments *

- Manages multiple stressors from superiors and/or subordinates with ease, success and/or assistance;
- Maintains professionalism or remains calm amidst stressful conditions;
- Handles crisis situations with strength, composure and/or leadership.

** Written in conjunction with 'Sample Performance Review Phrases, Examples of Performance Comments for Entrepreneurs'. Read more at Suite101: [Sample Performance Review Phrases: Examples of Performance Comments for Entrepreneurs](#) Article written by Bonny Albo*