

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 achievements of the employee;
- clarify any changes to the employee's role;
- plan for the coming period 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. Achievement Review and Professional Development Process

The following procedures will assist managers and staff to undertake 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 review meetings.

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 a staff achievement review every six months.
- 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?

- Meetings will be held every six months and are arranged by the manager, for a time most convenient to staff and manager.
- The process will be ongoing with regular feedback provided to the staff member. Managers are encouraged to engage in informal 'follow up' in which expectations and needs are discussed.

4.3 Prior to the meeting

- One week prior to the meeting the 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 manager during the meeting, not prior to the meeting, as Carclew's appraisal process concentrates on the discussion between staff member and their manager.

4.4 The meeting

- The manager will meet with the staff member at the arranged time and location. Both 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.
- 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 achievement review discussion.
- An important component of Carclew's planning and development process is the discussion of the employee's professional and career development. Examples of opportunities may include:
 - Undertaking professional development short courses or conferences.
 - Undertaking further studies related to their profession/role/career pathway.
 - Opportunities for career development within the Organisation through internal vacancies.
 - Professional development programs including induction and work based learning; undertaking research or project work; networking and mentoring programs; and organisational planning and team-building days.
 - Recognition of being a member of a professional board or committee; participating in internal or external committees; assessor on state or national committees; volunteering as a participant of a professional forum or special interest group; judging or assessing professional excellence awards; participating in a mentor program; writing articles for professional magazines or journals, participation in research related to individual profession.
 - Recognition for other continuing professional development activities including self-directed learning.

4.5 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 manager, the recommendations for staff development action will be reported to the manager in a format agreed by the staff member and will remain confidential to the manager.
- 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 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.

4.6 Concerns about progression

- Concerns about a staff member's progression and/or conduct should be addressed by the manager as soon as possible and not held over to the review. In the first instance concerns should be managed by a 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 Senior Manager, Finance & Operations and Chief Executive, as appropriate.
- If after following this process, a 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 Senior Manager, Finance & Operations and Chief Executive.

4.7 Disputes

A staff member may invoke the *Grievance Resolution Procedures* where he/she believes that he/she has been treated unfairly in the application of a staff appraisal, eg. by an unfair or biased evaluation of achievements.

4. Legislation

South Australian Modern Public Sector Enterprise Agreement: Salaried 2017
Code of Ethics for the South Australian Public Sector

5. Related Carclew Policies and Procedures

Code of Conduct
Grievance Policy and Procedure

Disclaimer

This document does not represent legal advice. If you have any queries about your obligations, you should seek your own independent legal advice.