**PERFORMANCE REVIEW (EXAMPLE 1)**

The exact format and contents of this template will vary according to the organisation. Therefore, the following template can be used as guide and relevant changes made accordingly. However, any wording changes, other than those to insert a company or a person’s name(s), may change the context, meaning or purpose of the template and we recommend you receive advice from our Workplace Relations Consultants prior to making such changes.

## Contacting the Victorian Chamber of Commerce and Industry

The Victorian Chamber’s team of experienced workplace relations advisors can assist members with a range of employment, human resources and industrial relations issues.

Our team of consultants can also provide assistance to both members and non-members on a range of more complex matters for a fee-for-service. Our consultants can, among other things, provide training to employees, conduct investigations and provide representation at proceedings at the Fair Work Commission.

For assistance or more information, please contact the Workplace Relations Advice Line on (03) 8662 5222.

**Disclaimer**

The information contained in this document has been prepared by the Victorian Chamber of Commerce and Industry in this format for the convenience and benefit of its members and is provided as a source of information only. The Victorian Chamber does not accept responsibility for the accuracy of the information or its relevance or applicability in particular circumstances. The information does not constitute, and should not be relied on, as legal or other professional advice about the content and does not reflect the opinion of the Victorian Chamber, its employees or agents. The Victorian Chamber and its employees, officers, authors or agents expressly disclaim all and any liability to any person, whether a member of the Victorian Chamber or not, in respect of any action or decision to act or not act which is taken in reliance, whether partially or wholly, on the information in this communication. Without limiting the generality of this disclaimer, no responsibility or liability is accepted for any losses incurred in contract, tort, negligence, or any other cause of action, or for any consequential or other forms of loss. If you are uncertain about the application of this information in your own circumstances you should obtain specific advice.

# Performance Review

|  |
| --- |
| The *Performance Development and Review* document is in two parts:1. **Performance Management**

Allows staff the opportunity to meet with their manager to discuss part performance and achievements and set objectives for the next review period.1. **Learning and Development**

Allows for the setting of training and development plans. |

Employee Name:

Position Title:

Manager Name:

Date Work Plan Agreed:

Signature of Employee

Signature of Manager

*A performance development review template should be completed as part of the employee’s mid probationary period review (i.e. Performance Objectives and a Learning and Development Plan set). Then as part of the review, comments should be provided against the performance measures set, and an overall rating provided. Then, start a new performance development review template to set objectives and a training plan for the year ahead.*

|  |
| --- |
| Part 1 – Performance Management  |
| Performance Objectives | Performance Measures | Performance Review |
| List the key objectives of the role based on the Position Description /Divisional Business Plan | Criteria should be specific, measurable, attainable, relevant and time-framed and trackable | Feedback should be provided on performance against the criteria. |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| Values/Core Competencies |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| Performance Rating |
| **NEW IN ROLE** | A final assessment of “New in Role” is given where the employee is new in the role and is thus developing the skills and knowledge required to perform to a fully satisfactory level*The emphasis in the PDP plan should be on the learning and development plan and reflect activities that will assist the employee to increasingly undertake the duties of the job satisfactorily.* | **SCORE – 0** |
| **WELL BELOW STANDARD** | A final assessment of “Well Below Standard” is given where ‘on balance’ the work level performance standards have been assessed as significantly below the required standard. *The learning and development plans for future cycles should reflect activities that will ensure the employee can undertake the duties of the job satisfactorily.* | **SCORE – 4** |
| **EFFECTIVE WITH ROOM FOR IMPROVEMENT** | A final assessment of “Effective with Room for Improvement” is given where ‘on balance’ the work level performance standards have been assessed as requiring some improvement. *The learning and development plans for future cycles should reflect activities that will assist the employee to undertake the duties of the job more effectively.* | **SCORE – 3** |
| **FULLY EFFECTIVE** | A final assessment of “Fully Effective” reflects that the employee has met the performance criteria for the duties of the job.  | **SCORE – 3** |
| **EXCEEDED EXPECTATIONS** | In situations where the employee’s performance is considered to exceed the requirements of the role, feedback should be provided to this effect. | **SCORE – 1** |
| **Comments on Performance and Rating** |
| **Manager’s Comments:** |  |
| **Employee’s Comments:** |  |
| Signature of Manager: |  | Date:  |
| Signature of Employee:  |  | Date:  |

|  |
| --- |
| Part 2 - Learning and Development  |
| *The Learning and Development section is not an assessable part of the process, it is however an important foundation that provides a context for the issues surrounding work and career choices. In assessing training and development outcomes, think about performance since the last review and note below strengths and any areas that may need improvement, as well as how these could best be developed. The areas for development can then form your learning and development objectives.* |
| Strengths | Areas for Development |
|  |  |
| Learning and Development Objectives/ Areas for Development |
| **Methods of Development**Consider options – e.g. Courses, seminars, reading, on-the-job, coaching, mentoring. Which is the best option in this case? |  |
| Timing / Completion |
| **Review Comments**Describe how the learning outcome will be demonstrated in the workplace |  |