

- POLICY -

Performance Management and Development Policy

Policy Statement

Performance Management and Development is a planned, systematic and integrated approach for continuously developing the performance of all TAFE SA employees, and delivering a high performing culture. It includes a series of formal and informal processes designed to ensure individuals, teams and TAFE SA achieve their goals in an efficient and effective way. It provides a system to clearly define work goals and standards, set expectations and review performance against them, provide constructive two-way feedback, and maximise learning and development to empower people to achieve their full potential. A Performance Management and Development plan should be created at the beginning of the financial year and uploaded into Lumitt by 30 September. A Mid-Year review should take place between November and February and a Final Review by the 30 June.

Scope

All TAFE SA Employees

Policy

The Performance Management and Development process is a functional responsibility of Line Managers, to ensure that employees' activities, outputs and development are in line with organisational goals. The process is carried out and completed in accordance with this policy and related documents and guidelines, using an online system to facilitate the process. The process itself, however, is secondary to the central responsibility of Line Managers to guide, support, coach and develop their employees through meaningful, regular performance feedback.

Line Managers are to prepare for the Performance Management and Development (PMD) process. This includes ensuring role descriptors are current, business plans are set, becoming familiar with previous Performance Management and Development plans and planning key conversations.

The Performance Management and Development process occurs in three stages:

1. Performance Management and Development Plan Objective Setting and Review
2. Mid-Year Review
3. Final Review

Stage 1. Performance Management and Development Objective Setting and Reviews

Performance Management and Development objectives must be set annually by employees and approved by line managers at the beginning of each financial year (by the 30 September), in the form of a Performance Management and Development Plan. New employees are required to have a Performance Management and Development plan set within 4 weeks of commencing with TAFE SA. These plans are to be uploaded into TAFE SA's Learning Management System, Lumitt.

The People and Culture team will coordinate and lead the annual Performance Management and Development campaign.

These plans should incorporate SMART Objectives and further information and guidance on setting these can be found on the [Performance Management and Development intranet page](#).

Stage 2. Mid-Year Review / Ongoing Feedback

Respectful and genuine partnerships between line managers and employees are central to the success of performance management and development. The PMD process is not a proxy for regularly and ongoing feedback. Regular two-way conversations provide the opportunity to build rapport, agree on accountabilities, focus work outputs and provide timely feedback. Furthermore, regular two-way conversations are conducive to working together to create solutions and addressing barriers to achieving performance goals.

Line managers are expected to provide informal, regular and impromptu feedback to employees in relation to their Performance Management and Development Plans and behaviours in accordance with TAFE SA's core values, on a regular basis throughout the financial year/relevant period.

During November and February, employees and line managers are required to confirm in TAFE SA's Learning Management System (Lumitt) that a mid-year performance conversation has taken place.

Stage 3. Final Review

By 30 June a final review should occur to allow the manager and the employee to discuss the year that was. This conversation will include what was successfully achieved, areas that still require development and discussion around what this means moving forward. This can be documented on the PMD Plan, however can be kept at the workgroup/employee level and is not required to be uploaded into Lumitt.

Hourly Paid Instructors (HPI's) and Casual staff

While managers of HPI's and Casuals should ensure that these staff receive regular feedback and support regarding their performance and development and they may record this in the same way as on-going and temporary staff, it is not mandatory for them to have this formally recorded in TAFE SA's Learning Management System.

Managing of Unsatisfactory Performance (including misconduct)

Unsatisfactory employee performance is to be managed by the line manager, in consultation with the relevant Human Resource Business Partner, in accordance with the Commissioner for Public Sector Employment Guideline 'Management of Unsatisfactory Performance (including misconduct)', or relevant industrial tool.

Records Management

Once a Performance Management and Development Plan is finalised between the employee and the manager, the employee is required to upload the document into Lumitt by 30 September each year. The manager is required to approve this in Lumitt. Confirmation that a Mid-Year review conversation has taken place, also needs to be entered into Lumitt and while there is capability to upload an updated PMD Plan at this stage, it is not mandatory. There is no requirement to upload a final PMD plan review into Lumitt, this can be kept at the workgroup level.

Roles and Responsibilities

Outline the role(s) responsible for key actions or activities associated with the policy.

Position	Responsibility
TAFE SA Executive Directors, Directors	TAFE SA Executive Directors and Directors carry the primary responsibility for implementing the Performance Management and Development Policy by ensuring that employees are engaged in the Performance Management and Development process and are given access to relevant development opportunities.
Line Managers	Line Managers play a key role in performance management by setting objectives, reviewing performance, providing timely feedback, assisting employees to identify their strengths and development needs. As well as providing encouragement and the time to participate in development opportunities, and to reflect on, share and apply what they learn as part of their work.

TAFE SA Employees	Employees have a clear responsibility in consultation with Line Management to identify their objectives and development needs, seek feedback, and develop their skills to enhance performance in their current position and adapt to changes in their work.
Workforce Development	Workforce Development are responsible for supporting employees and managers with the Lumitt system and for overseeing the Professional Development funding administration. Workforce Development are responsible for campaigning the importance and undertaking of PMD.
Human Resource Business Partners	Human Resource Business Partners (HRBP's) are responsible for supporting TAFE SA employees, line managers, directors and executive directors through the provision of advice and guidance relating to Performance Management and Development.

Definitions

Term	Definition
<i>Performance Management and Development</i>	A process within the Performance Management and Development system to aid the functional responsibility of Line Managers to ensure that employees' activities, outputs and development are in line with the organisational goals. This includes a series of formal and informal processes designed for individuals and teams to achieve their goals in an efficient and effective way.
<i>Performance Management and Development Plan</i>	An agreement between an employee and Line Manager that sets out key tasks, priorities and agreed measures for the performance period, in addition to documented learning and development goals. This may include the identification and assessment of core competencies and behaviours.
<i>Performance Management and Development Reviews</i>	Formal reviews of employee Performance Management and Development where the conversation is planned, structured and documented. This may include a review of employee performance against an existing performance plan and/or the establishment of a new performance plan. The main purpose is for both the Line Manager and employee to gain an overview, in the form of a retrospective summary of performance and a prospective look towards the employee's ongoing Performance Management and Development. The review should build on the informal, regular performance conversations that have occurred throughout the review period.
<i>Professional Development</i>	

	Professional Development is the process of employees improving and developing their capabilities through access to education and training opportunities in and outside of the workplace, through formal workshops and/or on the job training, coaching and mentoring.
<i>Lumitt</i>	TAFE SA's Learning Management System
<i>Mid-year review</i>	The undertaking of a meaningful performance conversation between a manager and an employee between November and February that requires confirmation in Lumitt.

Associated Documents and References

Document Number	Document/Reference Title
<i>TAFE SA Performance Management and Development Intranet Page</i>	<u>TAFE SA Performance Management and Development Intranet Page</u>
<i>OCPSE Performance Management and Development (PMD)</i>	<u>Office of the Commissioner for Public Sector Employment – Performance Management and Development</u>
<i>OCPSE Code of Ethics</i>	<u>Code of Ethics</u>
<i>OCPSE PMD Guidelines</i>	<u>Performance Management and Development - Guidelines</u>
<i>OCPSE Premier's Direction PMD</i>	<u>Performance Management and Development – Premier's Direction</u>
<i>Management of Unsatisfactory Performance</i>	<u>Performance Management and Development – Guidelines – Management of Unsatisfactory Performance (including misconduct)</u>

Document Control

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