

Performance Planning and Review Procedure (MPF1147)

1. Governing Policy

1.1. This procedure is made under the [Performance, Development and Education Policy \(MPF1227\)](#).

2. Scope

2.1. This policy applies to

- a) all Continuing and fixed term professional employees at the University*
- b) certain specific academic executive leadership appointments by exception**,

noting that:

* Senior Managers are required to have a Performance Development Plan and undertake Performance Development Reviews (PDRs) in accordance with their individual contracts with the University. These arrangements may be subject to different requirements than outlined in this procedure.

** only if separately notified as part of their appointment, otherwise the [Academic Appointments and Promotions Policy \(MPF1299\)](#) applies for these topics.

3. Procedure

Performance review and development discussions

3.1. The Performance Development Framework (PDF) applies to all continuing and fixed-term employees to which this Section of this Procedure applies.

3.2. The people manager of a continuing or fixed-term employee will conduct at least one Performance Review and Development meeting and one Performance Review and Development Feedback session discussion every 12-month period. Performance Review and Development meeting and one Performance Review and Development Feedback session discussion every 12-month period. These should normally be scheduled to take place as follows:

- a) Performance Review and Development: mid-January to mid-March
- b) Feedback discussion: mid-June to mid-August.

3.3. Where a fixed-term employee is engaged for 12 months or less, the people manager will conduct a performance review at least two weeks prior to the expiry of their fixed-term contract.

3.4. Regular performance and development touchpoints are encouraged between these scheduled meetings to monitor and review progress on an ongoing basis, perhaps during chosen 1:1 meetings between employees and people managers.

3.5. The people manager will cover the following principal elements in a performance review and development discussion with the employee:

- a) Performance Review elements:
 - i. review of the role and responsibilities of the employee
 - ii. objectives, skills and knowledge acquisition set in previous feedback discussions
 - iii. acknowledge initiatives and achievements of the employee

- iv. develop a plan which includes future performance objectives to be agreed between the people manager and the employee
- v. provide feedback to the employee on their performance against objectives and advise the rating according to the definitions in Table 1
- vi. where appropriate, advise as to whether an increment will be awarded
- vii. provide feedback and coaching to the employee on specific areas requiring development, which should be clearly documented where performance is unsatisfactory.

b) Performance Development elements

- i. establish and agree on clear goals in terms of development activities and career pathways
- ii. agree on a series of development activities
- iii. track progress towards achieving those goals.

3.6. The performance review and feedback discussion is also an opportunity for the employee to provide feedback or raise concerns they might have in respect of any matter in section 3.5.

3.7. The employee's performance objectives will be aligned with the position description and performance standards of employment level and take into account:

- a) the individual and professional circumstances of the employee, including work fraction and comparative workloads, and the career objectives of the employee
- b) the operational requirements of the department.

Staff are invited to disclose relevant personal circumstances and working arrangements. People managers will plan for and assess performance taking into account relative to opportunity considerations.

3.8. An employee who receives a rating from their people manager of satisfactory or greater, as defined in Table 1, will receive an incremental progression in accordance with the increments provisions of the [Remuneration and Benefits Procedure \(MPF1170\)](#).

3.9. The people manager will arrange for outcomes of the feedback discussion to be documented and the rating entered into Workday.

3.10. The people manager shall retain copies in accordance with the [Records Management Policy \(MPF1106\)](#) and the [University Records Retention and Disposal Authority](#).

Table 1 - Ratings

Rating	Definition of rating
Outstanding	Demonstration of performance consistently exceeding expectation. The consistently high standard has earned recognition by others internal and/or external to the University.
Very good	Overall demonstration of consistent and sustained performance with all objectives being met and many being exceeded.
Good	Overall demonstration of consistent and sustained performance with all objectives being met and some being exceeded.
Satisfactory	Performance in most areas met the requirements of the position whilst other missed by a small margin.
Unsatisfactory	Performance and/or behaviour falls short of the required standard.

Confidentiality

3.11. The people manager must ensure that the outcomes of performance review discussions under the PDF are recorded in writing and stored securely and confidentially. Details of all performance reviews and feedback discussions under the PDF shall be managed in accordance with the [Privacy Policy \(MPF1104\)](#) and the University's [Privacy Statements](#).

PDF training

3.12. Prior to undertaking the supervisory responsibilities of the PDF, a people manager will complete training in the PDF. This will occur within three months of the appointment of the people manager.

3.13. A new employee will undertake PDF training as part of the probation process.

People Manager

3.14. For professional staff the people manager will be nominated by the head of the organisational unit.

Managing unsatisfactory performance

3.15. Procedures for managing unsatisfactory performance are outlined in clause 1.38 of the [Enterprise Agreement 2024](#).

4. Related documents

- [Human Resources website](#)
- [Probation and Confirmation Procedure \(MPF1148\)](#)
- [Remuneration and Benefits Procedure \(MPF1170\)](#)

- [Performance, Development and Education Policy \(MPF1227\)](#)
- [Enterprise Agreement 2024](#)

POLICY APPROVER

The Chief People Officer is responsible for the development, compliance monitoring and review of this procedure and any associated guidelines.

POLICY STEWARD

The Executive Director, Organisational Development is responsible for the promulgation and implementation of this procedure in accordance with the scope outlined above. Enquiries about interpretation of this procedure should be directed to the Policy Steward.

REVIEW

This procedure is to be reviewed by 30 September 2028.

DRAFT