workday.

Each calendar year, academic staff at the university with a contract of 12 months or longer and those employed at the university for 12 months or more, will be subject to a performance review. Reviews may include goals and development items that take more than one calendar year to complete.

As a supervisor of a qualifying academic staff member, a series of tasks will appear in Workday to complete the review. These tasks record the performance review conversation held between supervisor and team member into Workday for future reference.

People and Culture will initiate the performance review task in the second half of each calendar year.

Once your team member/s complete their self evaluation tasks for the performance period, as a supervisor, you will receive an *Academic Performance Review: Get Feedback* Task followed by a *Manager Evaluation: Academic Performance Review* task, then finally a *Manager Evaluation: Academic Performance Review: Provide Manager Review Comments* acknowledgement task.

This guide steps a Flinders University supervisor through the performance management recording process held within Workday.

The type of academic performance review completed will be determined by the academic role held by those you supervise. This guide goes through the Teaching and Research process which holds all possible steps in the review process. Other cohorts will have less steps to complete.

The four academic performance cohorts are as follows:

* Academic Performance Review for Research Staff.
* Academic Performance Review for Teaching Specialist Staff.
* Academic Performance Review for Teaching and Research Staff.
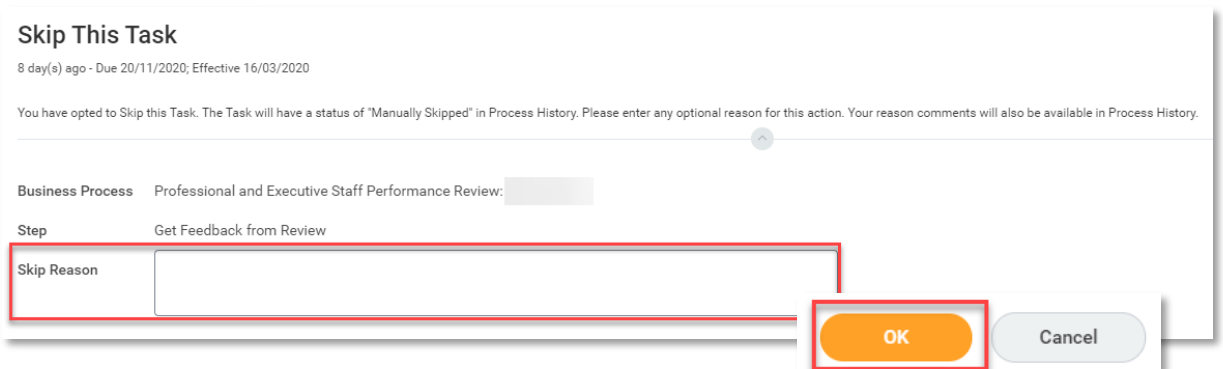* Academic Performance Review for Tied Funded Research Staff.
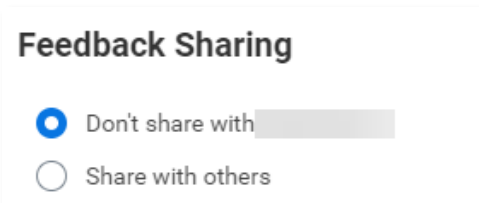
1. Open your Workday inbox.
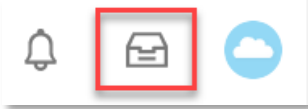
2. Select the *Academic Performance Review* task. If you wish to seek feedback about the relevant employee, in *From Workers,* enter the name of the employee you wish to seek feedback from. This could be an old supervisor, or peers of the team member. As a supervisor, you are able to select any employee.
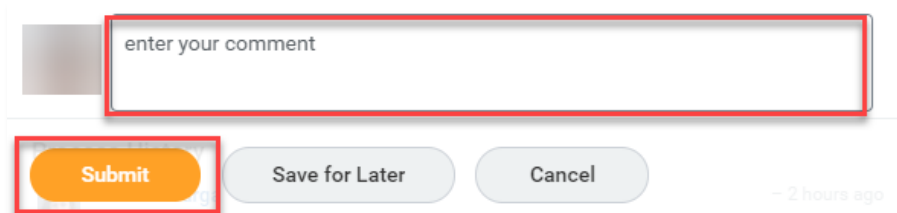
From Workers *
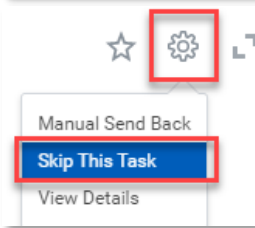
Should you not require feedback from another employee, you may skip this task. To do so, Click the settings wheel in the top right of the task and select *Skip this Task*. Add a *Skip Reason* and click *Ok.*

Manual Send Back
Skip This Task
View Details

Skip This Task

8 day(s) ago - Due 20/11/2020; Effective 16/03/2020

You have opted to Skip this Task. The Task will have a status of "Manually Skipped" in Process History. Please enter any optional reason for this action. Your reason comments will also be available in Process History.

Business Process	Professional and Executive Staff Performance Review:
Step	Get Feedback from Review
Skip Reason	

OK   Cancel

3. Select the *Feedback Sharing* option you require. Either, *Don't share with* the team member or, *Share with others* which allows the feedback to be known to the team member.

Feedback Sharing

○ Don't share with
○ Share with others

4. Under the *Questions* section, select the *Feedback Template* as *Feedback on Employee for Review.* Note: this should pre-populate for you.

Questions

Feedback Template | ✕ Feedback on Employee for Review ... ≔

5. The *Feedback on Employee for Review* template selected will populate a series of six questions. Edit, add or remove any of the questions for the feedback as required.

Questions

Feedback Template | ✕ Feedback on Employee for Review ... ≔

Question * | Format ∨ | B I U A ∨ | ≔ | ⌗
Has this employee maintained the same or better quality of work as previous years? If new to the University, has he/she established a good foundation to base improvement on?

Remove

Question * | Format ∨ | B I U A ∨ | ≔ | ⌗
Does this employee ensure that his/her actions consistently reflect Flinders University's mission statement and values?

Remove

Question * | Format ∨ | B I U A ∨ | ≔ | ⌗
Is this employee well regarded by colleagues and able to interact easily with a diverse workforce?

Remove

6. Enter any additional comments for the employee giving feedback and select *Submit.*
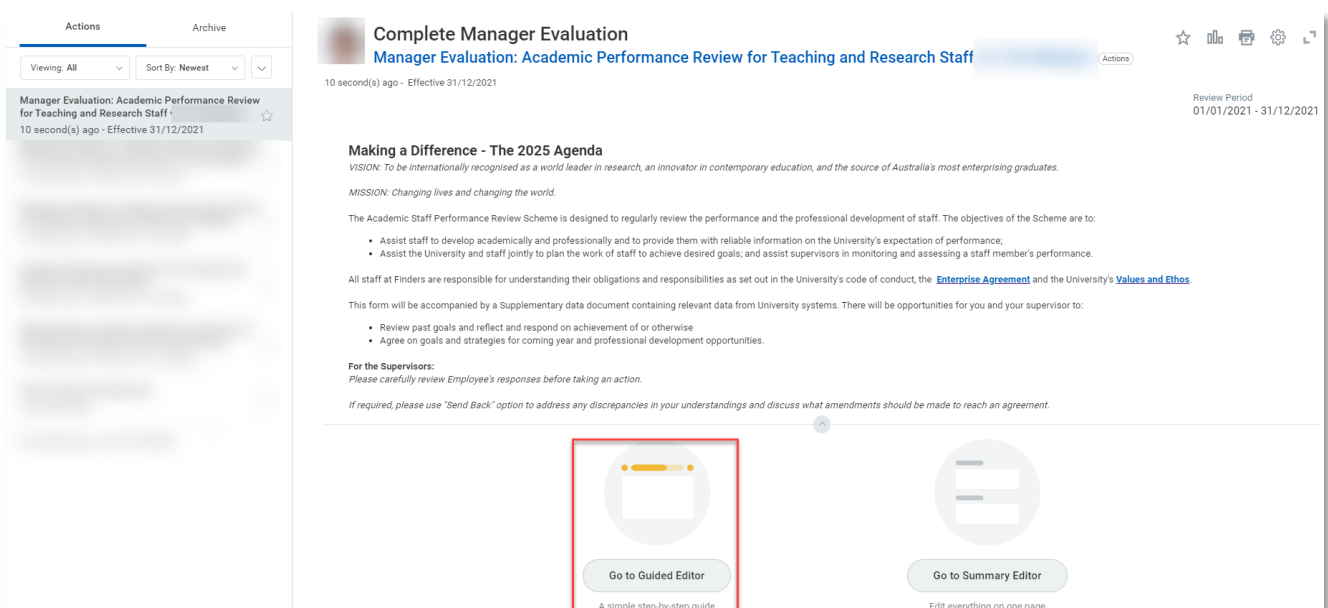
7. Once the *Get Feedback* task has been completed or skipped, you will receive a new task in your inbox, *Manager Evaluation: Academic Performance Review.*

   Please note, if you have requested feedback in the previous step but you choose to complete this next step before the feedback has been received, the feedback requests will be cancelled and will not be recorded. It is recommended to wait to complete this step until all feedback from the previous step has been received.

   Click on *Go to Guided Editor.*

workday.

8. Go through each section and review the information your team member has included. The first of these sections is *Teaching and Related Duties – Goals.* Add a *Manager Evaluation Comment* to each goal.

9. Click *Next.*

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workday.

10. The next section is *Teaching and Related Duties – Questions.* Your team member will have added their answer to the supplied question. Click into the *Manager Evaluation* to enter your *Comment.*

Manager Evaluation

Comment *

| Format ∨ | **B** *I* <u>U</u> **A** ∨ | ☰ | ⬚ | | ↗ |

11. Click *Next.*

| Back | **Next** |

12. The next section is *Research Outputs and Achievements – Goals.* Enter a *Manager Evaluation Comment* for each goal. Note: The Research Plan Template should be uploaded in the additional documentation and should correspond to any new goals entered for the next review year.

Research Outputs and Achievements - Goals ∨

‹ ›

For the goals pre-loaded from the previous review year (if relevant):
Reflecting on the research outputs as summarised in the supplementary data document, provide comments on meeting goals and effectiveness of strategies for research from previous year.
In responding, consider supplementary data document which provides full list of ERA recognised research outputs, research income, and HDR completion data and relevant benchmarking information.

For the next review year:
After completing the detailed research plan using the following template: Research Plan Template, summarise the agreed goals and strategies for research for future period.

Goal *
Example Research output and achievements goal.

Relates To
Knowledge (Competency)
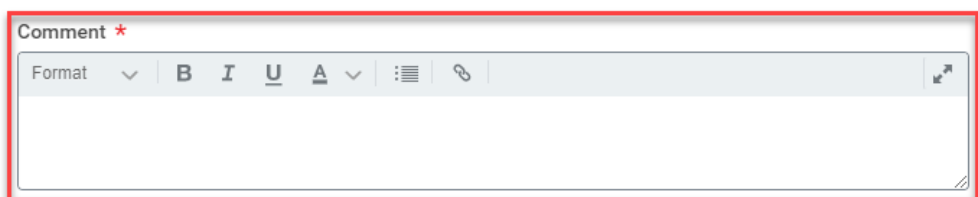
Category
Research Outputs and Achievements
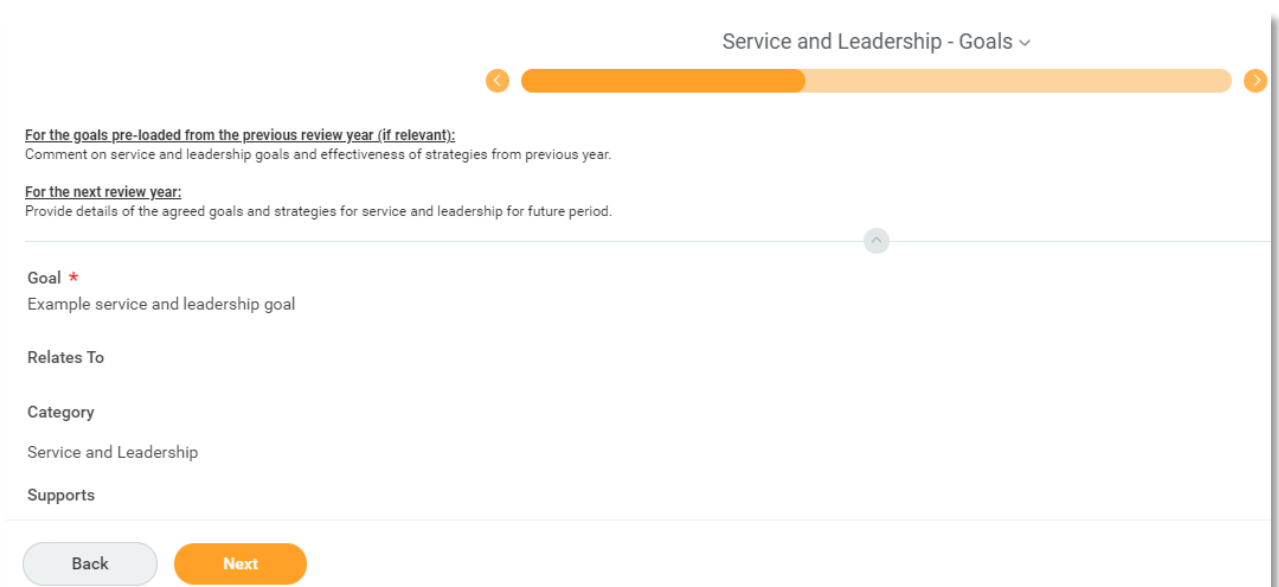
Supports
| Back | Next |

Manager Evaluation

Comment *

| Format ∨ | **B** *I* <u>U</u> **A** ∨ | ☰ | ⬚ | | ↗ |

13. Click *Next.*

14. The next section is *Service and Leadership – Goals.* Enter a *Manager Evaluation Comment* for each goal.

15. Click *Next.*

workday.

16. The next section is *Service and Leadership – Questions.* Enter a *Manager Evaluation Answer* for each question.

Service and Leadership - Questions ∨

Question
Provide information on any formal service and leadership roles and activities recognised in academic Workload Allocation that you hold, and the period held.

This may include role such as course coordinator, teaching program director, higher degree research and honours coordinator, research section head, performance reviewer, etc.

Manager Evaluation   **Employee Evaluation**

Answer *   Answer
                                                     Example Answer

Question
Describe your contribution to advancing the University's Reconciliation Action Plan (RAP), the Athena SWAN Action Plan and any other University strategic initiatives.

Manager Evaluation   **Employee Evaluation**

Answer *   Answer
                                                     Example Answer

[Back]   [Next]

Manager Evaluation

Answer *

Format ∨ | **B** *I* U A ∨ | ☰ | 🔗   ↗

17. Click *Next.*

[Back]   [Next]

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18 The next section is *Professional Development.* Review employee responses in the Status Note against each development item and provide a *Manager Evaluation Comment*. Note: The Professional Development Template should be uploaded in the additional documentation and should correspond to any new development items entered for the next review year.

Professional Development ⌄

After completing the detailed professional development plan using the following template: Professional Development Template, summarise the agreed development items for future period.

Development Item *

Example Development Item

Additional Information

Relates To

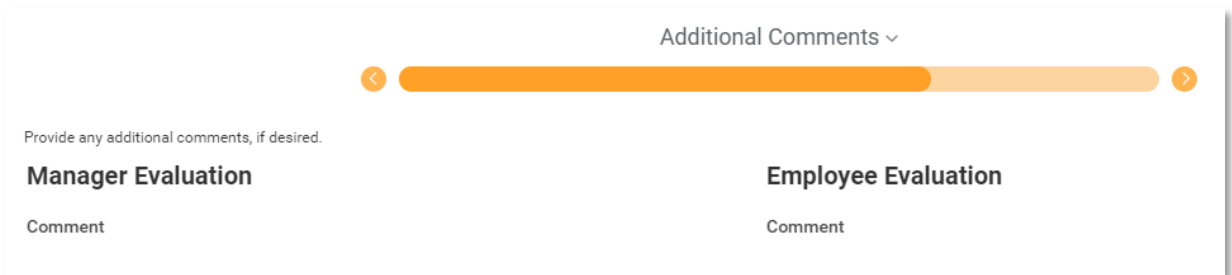Status *

In Progress

Add

Back   Next

Manager Evaluation

Comment *

| Format ⌄ | B | I | U | A ⌄ | ≔ | 🔗 |

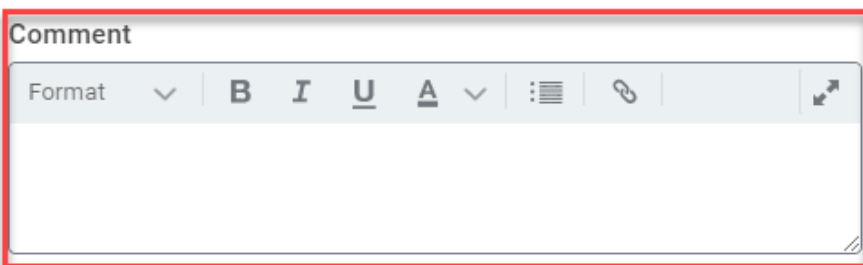**19.** Click *Next.*

Back   Next

20. The next section is *Additional Comments.* Enter any additional comments for the performance review here.
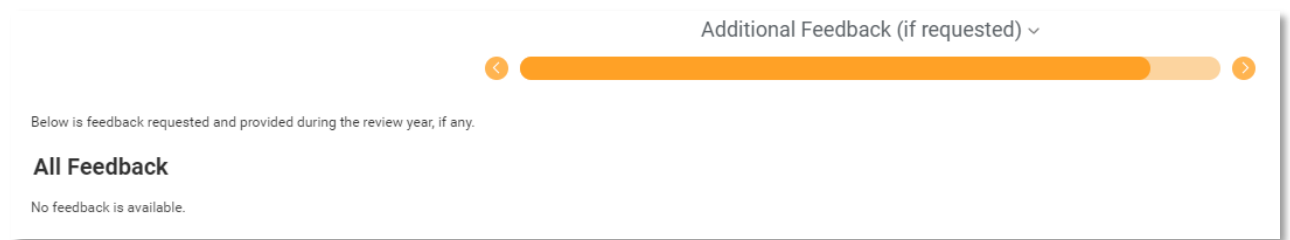

21. Click *Next.*

22. The next section is *Supporting Documents* (image next page). Your team members are required to upload following documents for each performance review period:

- Up-to-date current Curriculum Vitae (all Academics).
- Full SET extracts for topics coordinated and taught into (Balanced and Teaching Academics).
- Completed Research Plan (template document from link in step 25) (Balanced and Research Academics).
- Completed Professional Development Plan (template document from link in step 57)(all Academics).

workday.

Supporting Documents ⌄

Please upload following documentation:
• Up-to-date current Curriculum Vitae
• Full SET extracts for topics coordinated and taught into
• Completed Research Plan
• Completed Professional Development Plan

Employee

Evaluation Supporting Document

DOC

Updated By

Upload Date

09/02/2021 03:36 PM

Comment

Manager

Add

As a supervisor you can also *Add* documents here if required. Click *Add* and *Attach.* Also add a *Comment* to advise what the document is.

Evaluation Supporting Document
(empty)

File

Attach

Updated By
(empty)

**Upload Date**
(empty)

Comment

23. Click *Next.*

24. The next section is *Additional Feedback (if requested)*. Only if your team member has previously requested feedback from yourself or, you as a supervisor, have requested feedback from another employee at steps 2 to 6, will any feedback appear here. Otherwise, if no feedback has been requested, this section will state 'No feedback is available".

Additional Feedback (if requested) ⌄

Below is feedback requested and provided during the review year, if any.

All Feedback

No feedback is available.

25. Click *Next.*

26. The final section is the *Summary* of all the sections to this point. This screen (image next page) shows the information entered in all previous sections listed as a summary. Read through the summary to ensure all information entered is correct. If any section requires amendment, click on the *Guide Me* icon in the top right of the section. This will take you back to amend the information for that section. Then click *Next* through to the summary screen again.

Guide Me
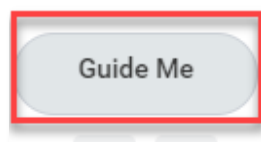
Making a Difference - The 2025 Agenda

VISION: To be internationally recognised as a world leader in research, an innovator in contemporary education, and the source of Australia's most enterprising graduates.

MISSION: Changing lives and changing the world.

The Academic Staff Performance Review Scheme is designed to regularly review the performance and the professional development of staff. The objectives of the Scheme are to:

- Assist staff to develop academically and professionally and to provide them with reliable information on the University's expectation of performance;
- Assist the University and staff jointly to plan the work of staff to achieve desired goals; and assist supervisors in monitoring and assessing a staff member's performance.

All staff at Finders are responsible for understanding their obligations and responsibilities as set out in the University's code of conduct, the Enterprise Agreement and the University's Values and Ethos.

This form will be accompanied by a Supplementary data document containing relevant data from University systems. There will be opportunities for you and your supervisor to:

- Review past goals and reflect and respond on achievement of or otherwise
- Agree on goals and strategies for coming year and professional development opportunities.

Teaching & Related Duties - Goals   Guide Me

Goal *
Example Goal

Relates To
Knowledge (Competency)

Category
Teaching and Related Duties

Supports

Submit   Send Back   Save for Later   Close

27. When the summary is complete, click *Submit.*
Note: Supervisors should use this evaluation step of the performance review to negotiate any discrepancies. If you click Submit here, the performance review will progress to the next step and you will no longer be able to amend any provided comments afterwards.

Submit   Send Back   Save for Later   Close

28. The *Success! Event submitted* screen will appear with an Up Next task to your team member to *Provide Employee Review Comments.*

Success! Event submitted
Manager Evaluation: Academic Performance Review for Teaching and Research Staff
[Actions]
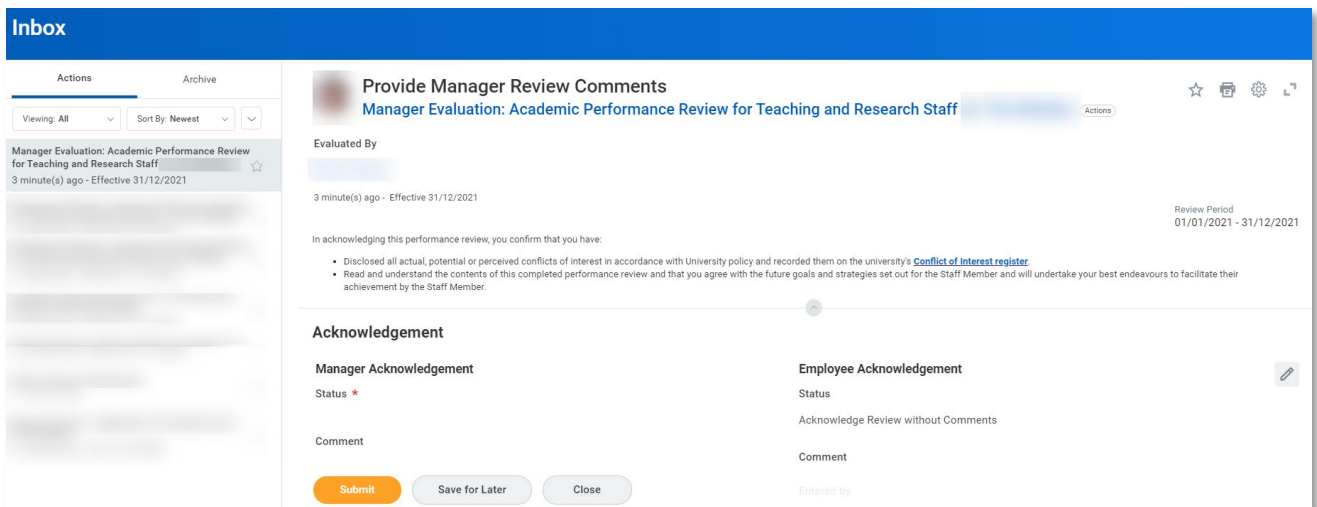10 second(s) ago - Effective 31/12/2021

Up Next

Provide Employee Review Comments
> **Details and Process**

Done

29. One the employee completes their acknowledgement of the review, as a supervisor, you will receive the final performance review task. *Manager Evaluation: Academic Performance Review: Provide Manager Review Comments* task will appear in your inbox.
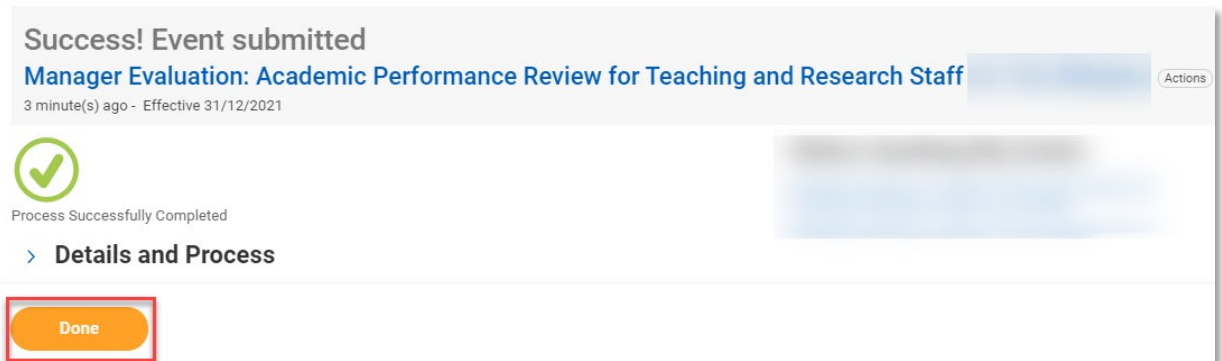

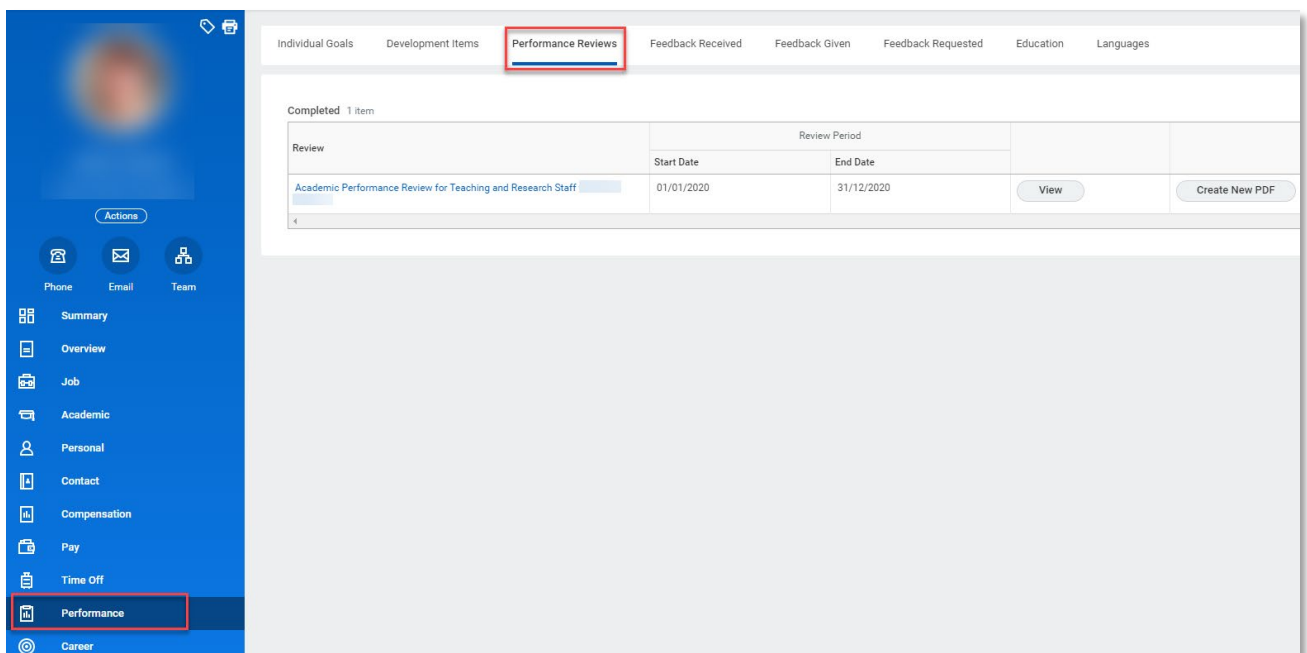Select the *Status* as Acknowledge Review without or with comments. Add *Comments* if required.
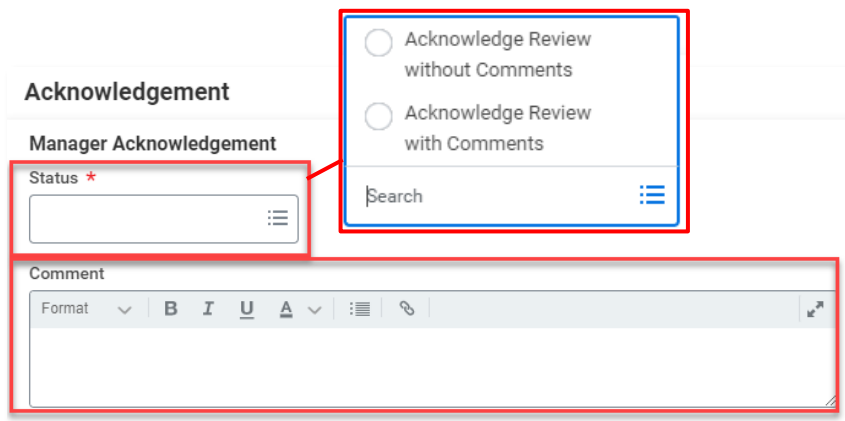
30. Click *Submit*.
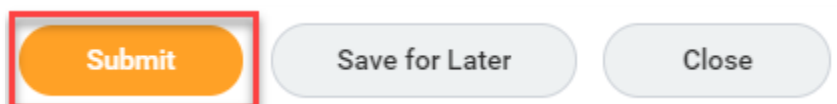
31. The *Success! Event submitted* screen will appear. This ends the process for Professional and Executive Staff Performance Review.
Click *Done.*

This completes the performance review process for this employee until the next year.

The Performance review information will sit in the Employee profile under *Performance* and *Performance Reviews.*

This ends the process.