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## Tool Kit item 2 - Preparing for the Conversation as a Supervisor

To ensure that everyone gets the most out of a performance review and development discussion, it is important that each party reflects and prepares prior to the conversation. The following checklist may be a helpful guide.

- Understand the process.
- Supervisor/manager to arrange the review meeting.
- Organise a mutually convenient time, date and venue (comfortable, free of disruptions and facilitates open communication).
- Make sure both/all parties have time to prepare – at least one week’s notice is recommended.
- Invest the time to read and understand the information provided by your staff member.
- Allow yourself time to update Workday following the PRD.

### Understand the process

In accordance with the University’s new PRD process, which will occur via the Workday platform, all staff will be asked to undertake two formal face-to-face PRD meetings each year. The first formal meeting will occur between April and June, during which a review of performance and goal setting will occur, and a second one will be scheduled in the second half of the year to review progress and goals.

Just formal performance review on its own is of limited use as, by the time performance is reviewed, goals either will have been achieved or not. If the latter, there may be limited ability by that time to get performance ‘back on track’ before the end of the performance review cycle.

### Preparation by Supervisors/Managers

Understand that some staff may be apprehensive about performance review and development. Try to focus on the positive points and how setting measurable goals can, for all of us, provide a sense of purpose and clarity about roles, what our work is designed to achieve and the significant impact our work has on the success of the workplace.

This is also a forum to assist staff to identify and develop goals that will help them towards the next stage of their career. While it is appropriate for the supervisor to support this, albeit not at the expense of their core role and responsibilities, the driver needs to be the staff member.

The form, i.e. Work Day is not the focus; it is a recording tool and a point of reference to assist staff and supervisor/managers to review progress.

The overall focus of PRD is relationships between people as these enable effective ongoing communication and feedback about performance and development. PRD works best in a context of trust and respect. Act as a coach in these situations as far as possible and ensure that you lead by example as a supervisor or manager, and role model the values of the University.

A useful exercise for you to do in considering PRD implementation and how you may embed it into your ongoing workplace management is to reflect on the following questions in terms of how you currently operate and work with staff.

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- Planning – How do I make the links to the university's strategic direction? How do I communicate the work area's future directions and priorities? How do I clarify expected work goals?
  - Developing – How do I currently determine development needs? How do I support learning and development in the workplace?
  - Reviewing – In what ways do I currently support and monitor achievement of work and learning goals/development needs?
  - Recognising/Rewarding – In what ways do I recognise achievement of individual staff and the team? How do we celebrate our successes?
  - Reflect on what is currently working well from your point of view? What's not and needs to change? How might you go about making changes?

### **Performance Gaps and how they fit into the PRD**

As a rule of thumb, there should be **no surprises** brought up in the PRD. In the event there are issues identified during the year, they should be addressed at that time and not left for the PRD meeting. This includes previously set goals that have not been achieved.

This forum is intended to be a constructive process to support growth and development of staff members and enhance communication between the supervisor and staff member. Introducing performance issues for the first time in this forum may break down the trust in the process and result in the staff member losing sight of future goals and objectives.

If there have been issues identified and addressed with the staff member during the year, it is appropriate to reflect on these and recognise if there is improvement or, if not, potentially use them to help inform the setting of performance goals.