

## INTRODUCTION / INSTRUCTIONS:

This form is part of the Adelaide University Union's (AUU) Performance Development and Review (PDR) process and contains the key components necessary for an effective PDR conversation. Use this form to record the outcomes of the PDR conversations. The form should be retained by the employee / Manager for the duration of the process, however an electronic copy should be provided to HR for retention on the employee file.

### PDR Cycle timings:

<b>Objective Setting Stage</b>	between January and March
<b>Mid Term Review Stage</b>	between June and July
<b>Final Review Stage</b>	between November and mid-December

*Please note: That whilst there should be three conversations and the objective setting stage should be completed after the operational plans for each group have been set, there is some flexibility to amalgamate the final review stage with the objective setting stage.*

Prior to each PDR meeting both staff member and supervisor should come prepared with some ideas of work objectives and development needs/activities, or reflection on performance and achievements of these, as well as feedback for the other person.

### Conversation Record sections:

<b>Part 1: Objectives &amp; Achievements</b>	This section provides space for Key Result Areas (KRA), objectives and measures to be recorded at the Objective Setting Stage and comments from both staff member and supervisor at the Mid Term and Final Review stages. People Leaders may wish to set a specific objective around their leadership role.
<b>Part 2: Competencies</b>	This section lists the AUU's core competencies that employees are expected to demonstrate as a part of their role and allows both employees and their manager to discuss the extent to which these competencies have been met during the review period.
<b>Part 3: Development</b>	This section provides space to record outcomes of discussion around strengths and behaviours and professional development needs and requirements. The 70/20/10 principle has been included to assist staff and managers to consider appropriate action.
<b>Part 4: Mid Term &amp; Final Review Summary</b>	Used only in the Mid Term and Final Review Stages, this section allows you to reflect and provide some general summary comments on performance, development and achievements.

**EMPLOYEE DETAILS:**

Employee Name:		Review Year		Signed Complete	Employee	Manager
Employee Position:		Objective Setting Meeting date		Signed Complete		
Manager Name:		Mid Term Review Meeting date		Signed Complete		
Group:		Final Review Meeting date		Signed Complete		

**PART 1: Objectives & Achievements**

Consider your key result areas and work objectives for the year and specify how you will measure the achievement of each objective. Give thought to your work’s alignment with the strategic objectives and the relevant Operational Plans of the AUU. *It is recommended that you identify four Key Result Areas (KRAs) and set no more than 3 objectives against each KRA.*

Key Result Areas (KRA) / Work Objectives			Mid Term Review Comments	Final Review Comments
KRA:		Measure:	Staff member:	Staff member:
Objectives	•	•		
			Manager:	Manager:
KRA:		Measures:	Staff member:	Staff member:
Objectives	•	•		
			Manager:	Manager:
KRA:		Measures:	Staff member:	Staff member:

Objectives	•	•		
			Manager:	Manager:
KRA:		Measures:	Staff member:	Staff member:
Objectives	•	•		
			Manager:	Manager:

People Leaders only: What are your leadership objectives?

KRA:	LEADERSHIP	Measures:	Staff member:	Staff member:
Objectives	•	•		
			Manager:	Manager:

What support will you need to achieve your objectives?

PART 2: Competencies

Competencies	Not Applicable		Does not meet the necessary standards (development plan required)		Does not consistently meet the necessary standard/s		Consistently meets the standards required		Exceeds the standards required	
	Mid	End	Mid	End	Mid	End	Mid	End	Mid	End
<b>CUSTOMER SERVICE:</b> Proactively develops customer relationships by making efforts to understand needs and provide solutions										
<b>COMMUNICATION:</b> Listens effectively, actively communicates with colleagues and customers and is clear succinct and logical in style.										
<b>TEAM WORK:</b> Works cooperatively with and proactively helps others; volunteers ideas and supports group decisions; puts broader objectives ahead of own needs.										
<b>CREATIVITY AND INNOVATION:</b> Identifies fresh approaches and shows willingness to question traditional assumptions; actively seeks ideas and improvements.										
<b>ETHICS AND ACCOUNTABILITY:</b> Is honest and ethical in all actions, such that other's trust is developed and maintained: demonstrates behaviour that is consistent with the AUU's direction, values and policies.										
<b>WHS:</b> Adheres to all relevant safety policies and procedures whilst reporting any workplace injuries, incidents and hazards utilizing the approved reporting procedures.										
<b>LEADERSHIP (If applicable):</b> Uses appropriate interpersonal style and methods to inspire and guide team toward goal achievement.										

Comments: [Click here to enter text.](#)

### PART 3: Development Plan

<b>What strengths have you brought to the role? What opportunities are there for you to apply these strengths?</b>
<b>In order to achieve your objectives, which behaviours or capabilities will you focus on in the next 12 months? e.g. communication, collaboration</b>

**70/20/10 Learning and Development Principle**  
 The 70/20/10 principle views development of an individual as occurring through three basic types of activity. The numbers represent the recommended percentage that each should contribute to the learning of an individual.

#### Professional Development

When considering your professional development, first identify development areas or development outcomes that will support you in your role in the short term. Identify the activity that will best provide this development and specify a timeframe to ensure that the expected outcomes are achievable and realistic. Be sure to consider the 70/20/10 principle.

Areas for Development	Development Activity	Comments and Progress
Record the tasks, skills or behaviours that following discussions, are agreed to require development.	Record the agreed development activity. This could be a workshop, on-the-job training, coaching from someone with the required skill set or accredited course.	Record the action you have taken to support development, and anticipated completion. At the review conversations, records progress on how development is tracking and its impact of the area of development.

**Experiential Learning** 70

Learning and Development through day-to-day tasks, challenges and practices  
 e.g. workplace projects, higher duties opportunities, secondments

**Social Learning** 20

Learning and development with and through others  
 e.g. coaching, mentoring, conference attendance

**Formal Learning** 10

Learning and development through structured modules, courses and programs  
 e.g. further study, formal workshops or seminars, online learning

**PART 4: Mid Term and Final Review Summary**

Complete this section at the Mid Term and Final Review meetings.

**Staff Member**

Mid Term	Final Review
<b>Is there anything stopping you from achieving your goals as well as you could? What organisational support and tools could be provided to improve performance?</b>	
<b>What could your Manager do differently to better facilitate you achieving your goals?</b>	
<b>General comment on your achievements, performance and development over the year.</b>	
<b>For People Leaders only: Reflect on how you have supported a positive and productive team and fostered high performance.</b>	

**Supervisor**

<b>General comment on staff member's achievements, performance and development over the year.</b>	