



Performance and Development Plan (PDP)

GOOD PRACTICE GUIDE

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Purpose of the Good Practice Guide

This Good Practice Guide provides employees and line managers with practical step by step guidelines for developing, reviewing and managing Performance and Development Plans (PDP).

Section 1 - Developing your Performance and Development Plan (PDP) - *for all employees, to be completed in March*

This section is applicable for all employees

Preparing your Performance and Development Plan

Employees are required to draft and submit their first version of their Performance and Development Plan (PDP) in preparation for their discussion with their line manager.

Step A: Complete your performance goals

The first step in completing your PDP is to develop appropriate performance goals.

Setting performance goals should be completed collaboratively with mutual input from the line manager and employee.

Your goals should be clearly aligned to your Quality Improvement Plan (QIP) goals, your role responsibilities (as per your position description) and the behaviours and values you need to demonstrate in your role (as per the Shine Bright Strategic Plan, Code of Conduct and ECA Code of Ethics). Your PDP should have a maximum of three goals.

Your goals should specify the criteria by which goals will be objectively assessed. Performance measures should be written using the SMART model: Specific, Measurable, Achievable, Realistic and Timely.

Specific	Does the goal clearly relate to my job so that my actions will result in achievement (quality improvement)? Be clear as to what the goals mean.
Measurable	How will I be able to tell the goal has been achieved?
Achievable	Is it something I am able to achieve? The goals must be achievable.
Realistic	Is the goal realistic while still representing a challenge?
Timely	Is there an agreed time for achievement of the goal, including a start and end date? The goals must be trackable.



For Example:

Initial Goal: Improve my skills in working with challenging children				
Specific	Measurable	Achievable	Realistic	Timely
Improved skill in dealing with challenging behaviours	I will have confidence in working with children with challenging behaviours, our kindergarten group will be fully engaged in the educational program.	Through professional readings, PD and coaching conversations	Yes it can be achieved through our services PD budget and by allocating time for professional readings and conversations in my non-contact time	To be completed by the end of term two
Revised Goal: At the end of term two, I will have improved my skills in working with challenging children through professional readings, PD and professional conversations and our kindergarten children will be fully engaged in the educational program				
Initial Goal: to develop my mentoring skills				
To develop my skills in mentoring educators	Skill level and confidence of team members has increased.	This will be achieved by undertaking the PD to complete DET's mentoring program and then put in use in the Ed Leader time allocation	This practice will align with my role as EL and improve the overall competence of staff in our Kindergarten.	I will ensure that the mentoring sessions are successfully completed each month during EL times.
Revised Goal: By the end of term three, I will have improved my mentoring skills by attending specific mentoring training provided by DET and will have implemented these skill through Ed Leader discussions				

Step B: Define a Learning and Development plan

One of the most important parts of your PDP is your development. Here is where we discuss your development needs.

Various opportunities to improve performance may be discussed when goals for your PDP are being set and during performance and development review discussions. These development objectives and how they are going to be met should be formalised in this section of your PDP. New responsibilities or potential roles in the future may also suggest development areas.

Think through your developmental objectives for learning and development for this coming year.

Ask your line manager to identify any improvements they feel can be made to your current skills and knowledge.

- What areas of development are important to your role?
- What training or other learning experiences do you need to be able to achieve the performance goals set out in the PDP and be beneficial for your development?



- What new skills do you need to develop to be effective in your current role?
- What career opportunities are you looking for?

Step C: Having a career planning discussion

Career development is an ever-evolving, on-going process of decision making over the life time of your working life. It requires evaluation, re-evaluation, planning and action.

Developing a PDP provides a great avenue for employees to engage in a dialogue with their line manager about their career. This includes identifying areas that employees need to develop in order to achieve their career goals and aspirations.

However it is important to note that not everyone wants to develop their careers. Some people may be content with their current role and position in the organisation. This is OK and you do not have to discuss your career if you don't want to. This is why the Career Development section in the PDP template is optional.

If you are interested in having a career conversation with your line manager as part of developing your PDP then here is some examples of the types of career discussions that you can have:

- *Seeking feedback and information.* A career conversation can convey different kinds of information. This includes feedback on performance, feedback on how an individual's performance is seen by the organisation, information about particular jobs or other areas of work in the organisation and a broad overview of career options inside the organisation.
- *Exploring options.* Some career discussions go beyond offering information and feedback. They explore the motivation of the individual, their work-life balance. Such discussions can lead to a wider view of career options in terms of what would best suit the individual and their circumstances.
- *Some events trigger the need for discussion.* For example applying for jobs and not being selected, feeling bored or 'stuck in a job', change in career direction, organisational changes
- *Identifying potential development.* Career discussions can be used to explore potential development opportunities and action steps that could be taken to assist an individual in managing their career. Development opportunities could include on the job training, secondments, short term project roles, higher duties assignments, further study or attending training programs and 'shadowing'.



Section 2 - Reviewing your Performance and Development Plan (PDP) - for all employees, to be completed in September

The aim of this section is to provide employees with practical steps for effectively preparing for their annual performance and development review meetings with their line manager.

The purpose of the review meeting

The Performance and Development Plan review meetings provide an opportunity to meet one-on-one with your line manager and discuss your past or current performance, future goals, and development needs. This meeting will enable you to have a conversation with your line manager about establishing or adjusting work priorities, reviewing what has happened during the year as well as discussing your future development. One of the most important things you can do to ensure the success of your discussion is to actively prepare for it.

Here are some tips to help you prepare for your discussion:

1. Gather foundational information

Review your position description and the goals and development plans set out for you at your last appraisal (if applicable i.e. this plan was completed in the previous year). Use these as the foundation for preparing details of your accomplishments, strengths and areas for development. It can also be helpful to review your last appraisal and look at the feedback and ratings you were given then. It will help give you a sense of how you've grown and developed over the last period.

2. Prepare a list of your accomplishments

Using the above information, you are ready to prepare a list of your accomplishments. Ensure you relate them to your goals. Make sure you capture the "how" not just "what" you accomplished, but keep it brief; do not use this as a diary or performance journal. Give your line manager any contextual details they need to understand your performance. Identify any challenges that limited your abilities to succeed, as well as any support you received from others. Do not just focus on the last few months, look at what has happened over the whole review period since last September.

Make note of any training or development activities you completed.

3. Do a quick self –review

- a. Review of Major Objectives. How did your achievements match your intended objectives? What examples can you provide that supports your achievements?
- b. Additional Contributions: What additional projects or contributions did you make to the team or LMPA this year?
- c. Learning and Development outcomes:
What major learning and development outcomes did you achieve this year? What activities provided the needed learning? How did you track outcomes? What evidence is there of your achievements?
What other general learning and development goals did you achieve? What activities provided the needed learning? How did you track outcomes? What evidence is there of your achievements?



d. The next Performance and Development Review agreement

Think through the major work objectives you would like to set for next year.

Think through your needs for learning and development for the next year. In what areas do I want to improve on next year?

Guidance for Line Managers in preparing for review meetings with their employees

Managers and team leaders are encouraged to use this section to prepare for review meetings with their employees.

Why should we do performance and development reviews?

Managing the performance and development of our staff is an important tool to build our capabilities to enable us to deliver our organisational and service strategies ('What we delivered') in a way that is consistent with our values and behaviours ('How we delivered').

Managing the performance and development of our staff is an on-going process. It includes regular and consistent formal and informal feedback between line managers and employees.

Regular performance conversations enable line managers to ensure that their employees understand what is expected of them and that they will have the necessary capabilities and access to development which will enable them to meet their performance and learning goals. In addition these conversations encourage actions to be consistent with our values and behaviours.

Good performance management has a focus on developing and clarifying individual performance goals for employees as a basis for their work and relevant learning and professional development requirements. It is also instrumental in supporting people in developing their skills for current and future work requirements as well as progressing within their careers.

Annual Performance and Development Review discussion

The annual Performance and Development Plan (PDP) meeting is a formal meeting at the end of the performance review cycle (September) which provides the opportunity for the line manager and the employee to review and assess the employee's performance together.

There should be 'no surprises' or unexpected or unfavourable feedback or comments for the employee at the meeting. If you have any concerns with the performance of the employee, these concerns should be addressed as soon as possible and not left for the annual review meeting.

Performance conversations need to occur regularly throughout the review cycle so that any problem solving or corrective action can be carried out when the matter occurs.

One of the most important things you can do to ensure the success of your discussion is to actively prepare for it.

The checklists on the following pages outline what line managers need to consider and action, before, during and after the meeting.



Before the meeting

- Give adequate notice for the meeting allocating enough time (minimum: ½ hour for Certificate 3 and Diploma positions and 1 hour for Teacher positions) to have a proper discussion and assessment of the employee's performance during the review cycle
- Give yourself time to fully read the employee's current Performance and Development Plan (PDP) – Section 1
- Consider the employee's performance on each goal and overall performance standard prior to the meeting. Be prepared to provide specific examples and any factual information and feedback to support your views
- Consider objectives for the next PDP that provide new challenges
- Reflect on how you will create a neutral, non-threatening environment for the meeting. For example: Write down the words you will use; Decide the order in which you will discuss the issues; Rehearse if required.

During the meeting

- Do not allow external interruptions. Turn off your mobile phone.
- Put the employee at ease-especially if it their first meeting.
- Explain the way you intend to conduct the meeting-what you will discuss during the meeting.
- Mention that you want to come to a mutual agreement about their performance and development that has happened during the review period.
- Start with the positives, recognise and provide feedback about good performance. (Both morale and motivation are boosted when the employee feels valued, acknowledged and appreciated)
- Address any 'problem areas' in an objective manner with the aim to improve performance. If handled correctly, this feedback can serve as a trigger to further learning and development.
- Stick to the facts-discuss performance on each goal against the agreed performance measures in the employee's current PDP.
- Discuss reasons for not achieving any of the goals (there may be circumstances beyond the control of the employee).
- Discuss any areas for improvement.
- Discuss any issues affecting performance and potential solutions to any problems.
- Look to the future and discuss potential objectives and goals for the employee's next Performance and Development Plan.
- Ask how you and the organisation can be of greater assistance for enhancing future performance.
- Discuss/identify relevant learning and development needs and relevant career development opportunities
- End on a positive note 😊



Communication tips during the meeting

- Be prepared to listen and don't do all the talking
- See the discussion as a two way communication process
- Encourage the employee to contribute by asking open ended questions
- Be in control of yourself-keep things unemotional. Manage the 'voice tone'
- Focus on aspects of the employee's behaviour, not personality traits, when providing feedback
- Reinforce the employee's strengths
- Don't 'bring up' issues you have been storing all year. These should have been dealt with when they occurred
- Stick to the facts
- Coach rather than judge
- Be open to feedback, including points of disagreement from the employee. Your employee may disagree with you-watch you don't personalise this.
- Convey and maintain confidentiality