



STAFF IN CONFIDENCE



PERFORMANCE REVIEW

The essential purpose of the Performance Review is to objectively review the capacity of an individual in their job role with Perth Boat School, to proactively seek two-way feedback with employees/contractors and enhance the communication, commitment and cooperation between staff and management so that individuals can set and achieve realistic objectives in line with their personal goals and those of Perth Boat School.

It is emphasised that performance review is focused on professional development, and is not a disciplinary process.



PERSONAL DATA

DATE OF THIS REVIEW:	
NAME (BLOCK LETTERS)	
POSITION TITLE:	
NO OF YEARS EMPLOYED BY PERTH BOAT SCHOOL:	
REVIEWING MANAGER :	
POSITION:	
PREVIOUS REVIEW DATE:	



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Section 1 JOB DESCRIPTION DISCUSSION

This section provides employees and management the opportunity to reflect on job roles and their relevant job description forms to update the relevance and effectiveness of the job to achieving Perth Boat School's overall objectives.

There are no scores in this section simply note areas for discussion.

JOB TITLE:	
BUSINESS UNIT:	
Consider: How the job role relates to the operational plan? Does it fit? How the job role relates to the Perth Boat School's strategic plan? Is the job role effective? Does the job description form accurately reflect the "actual" job role?	
AREAS FOR COMMENT / CONCERN :	
OUTCOMES OF DISCUSSION :	



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Section 2 CURRENT CAREER CHOICE AND ASPIRATIONS

This section is designed to allow you to reflect on yourself, your thoughts about your current job, your work environment and your career aspirations.

There are no scores in this section simply make notes for discussion.

Personal Reflections

What do you like best about your job?	
What do you like least about your job?	
What are you good at?	
Where do you think you could improve?	

Personal Achievements

What are your major accomplishments over the last 12 months?	
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Work environment enhancements / Reflections

What equipment/software do you think would most help improve your performance in your current job?	
What other thing would most help improve your performance in your current job?	
What single event over the past six months has in your opinion had the most positive effect for Perth Boat School?	
What single event over the past six months has in your opinion had the most negative effect for Perth Boat School?	

Personal goals/ Career Aspirations

Does your present job make the best of your capabilities?	
What do you expect to be doing (career-wise) in one year's time?	
What would you like to be doing (career-wise) in one year's time?	
What do you expect to be doing (career-wise) in five year's time?	
What would you like to be doing (career-wise) in five year's time?	



Section 3 JOB RESPONSIBILITIES/ KEY PERFORMANCE INDICATORS

This section allows both parties to reflect on previous and future performance objectives for the individual setting revised targets and performance indicators.

PRIORITY	KEYWORD	DESCRIPTION	PREVIOUS OBJECTIVES	ACHIEVEMENT TO DATE	NEW OBJECTIVE	ACTION

Section 4 GENERAL PERFORMANCE

This section is designed to cover your general performance within the work environment, and is not necessarily job-specific.

Use the following rating scale (from 1 to 5) to rate the demonstrated level of performance of the individual in the categories that follow: :

The ratings are to be based on tangible or demonstrated ability so when rating, write down your reason.

5	Excellent: Consistently high performance, needs no supervision or assistance. Willing to take responsibility. Communicates requirements/complaints/ ideas readily. Good leadership potential –inspires others
4	Strength: Performs consistently above average, generally able to perform well without supervision. A valuable team member.
3	Meets standard: Performs soundly with some need for supervision and guidance. My need more training.
2	Below standard: Area of weakness /development need. Cannot always keep up to work load. Errors are made, but individual has fundamental technical knowledge. Needs more training.
1	Significantly below standard: Cannot perform required duties, consistently making errors, work not up to date. In spite of training technical knowledge is limited. Communication skills are poor

	Assessment Ratings		
	Self	Manager	Agreed
Quality of Work : thoroughness, accuracy, to specification, no re-work, completeness, meeting KPIs, customer complaints Comments :			
Change : willingness and ability to adapt to change, understand new information, learn new skills, flexibility, coping with new challenges, making changes Comments :			
Job Knowledge : blending of job-related education, skills and experience, keeping up-to-date with job knowledge, understanding KPIs, understating job role Comments :			
Decision-making : capable of logical thinking, identifying and analysing options, selecting correct alternative, involving others in decision making Comments :			



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	Assessment Ratings		
	Self	Manager	Agreed
<p>Conceptual thinking : innovation, generation of new ideas, breaking the mould, imagination and creativity, keeping “big picture” in mind problem solving, suggesting how things could be done better , analysing root cause Comments :</p>			
<p>Timeliness : attendance, punctuality, meetings, deadlines, completing projects on time, providing information on time, accurately estimating length of a job, making best use of time, dealing with urgent or critical task, handling several tasks at once, managing conflicting work priorities Comments :</p>			
<p>Planning & organising skills : Planning the order in which tasks will be completed, being organised, Clean/ neat/ tidy work environment, following plans and specifications for job tasks, being prepared for meetings Comments :</p>			
<p>Inter-personal skills : interaction with fellow workers, dealing with clients/ contractors, dealing with difficult people, networking, empathy, conflict resolution, negotiation skills, communication Comments :</p>			
<p>Initiative : resourceful, able to get things done, persistence to achieve positive outcome, acting on problems or opportunities that arise Comments :</p>			
<p>Dependability : reliable, trustworthy, able to complete a job without supervision, finishing a job completely, taking into account how work impacts on others, passing on requests/messages/suggestions to approp person. Comments :</p>			
<p>Attitude to Safety : accepts responsibility, actively seeks to eliminate hazards, knowledge and maintaining personal and team “duty of Care” responsibilities Comments :</p>			



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	Assessment Ratings		
	Self	Manager	Agreed
<p>Teamwork : willingness and ability to work successfully with others to a common goal, accept decisions of others, follow team instructions, cultural awareness, obtaining cooperation from fellow staff, team problem solving, cooperation, helping others, understanding others needs Comments :</p>			
<p>Legislation : Knowledge of role and responsibility with OSH Act, FOI act, Privacy Act, equal opportunity legislation, Trade Practices, Comments :</p>			
<p>Personal development : Seeking feedback on own abilities and performance, willingness to undertake training and professional development, listening to others, proactively seeking new things to learn and keeping u to date with job knowledge Comments :</p>			
<p>Technology: Knowledge and skill in use of relevant equipment/machinery/tools/computer systems, looking after equipment/machinery/tools Comments :</p>			
<p>Customer Service (Internal & External) : Cultural awareness, high level of customer service provision., bias for action, identifying customer needs, follow-u[on requests/complaints/new business, dealing with difficult customers, complaints handling, asking the right questions, empathy Comments :</p>			
<p>Leadership : -setting good examples, support the team, taking responsibility, role model, providing feedback, involving team in decision making, keeping team informed, sharing thoughts and rationales, motivating others, empowering others, communicating goals and objectives, coaching and development Comments :</p>			



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Section 5 PROFESSIONAL DEVELOPMENT & TRAINING NEEDS

This section allows both parties to reflect on the professional development and training needs of the individual identified either prior to or during the review meeting.

<p>Consider: Technical skills – <i>Software, computer, office equipment, machinery</i> Interpersonal skills – <i>communication, negotiation, cultural awareness, assertiveness, business writing, customer service, consulting, networking</i> Perth Boat School specific – <i>policies, procedures, legislation, strategic direction</i> Leadership skills – <i>leadership, time management, delegation, coaching, role modelling</i> Management skills – <i>budgeting, workforce planning, business planning, performance management, exploring business opportunities</i></p>		
<p>Immediate Training Need: (Next 6 - 12 months) What training do you think would most help improve your performance in your current job?</p>		
Training Need	Deadline for Action	Responsibility for action
<p>Long Term Training Need: (beyond 12 months) What training do you think would most help your long term professional development/ career?</p>		
Training Need	Deadline for Action	Responsibility for action



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Section 6 GOAL SETTING AND AGREED FURTHER ACTIONS

This section is designed to record agreed outcomes of the performance meeting.

Goal-Setting ... *What goals or actions need to be set for the next review period?*

Personal:		
Agreed outcomes / actions	Deadline for Action	Responsibility for action
Job Specific:		
Agreed outcomes / actions	Deadline for Action	Responsibility for action



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Section 7 FEEDBACK TO MANAGER/SUPERVISOR

This section is designed to provide the manager/supervisor the opportunity to receive feedback from the individual on the manager/supervisors performance. Feedback is required to be positive and constructive identifying areas where the manager/ supervisor can better support the performance of the employee.

What behaviours exhibited by your manager/supervisor best support your work performance? Why?	
What behaviours exhibited by your manager/supervisor least support your work performance? Why?	
What do you want your manager/supervisor to continue? Why?	
What would you like your manager/supervisor to consider doing differently? Why?	
Is there anything you would like your manager/supervisor to start doing that would help you be more efficient and effective?	



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Section 8 SUMMARY OF FEEDBACK

This section is designed to capture a summary of overriding thoughts/comments/ key points or issues addressed during the review meeting.

STAFF MEMBER COMMENTS :

What single outcome would you like to see as a result of this Review?
Signed :

REVIEWING MANAGER/SUPERVISOR COMMENTS :

What single outcome would you like to see as a result of this Review?
Signed :



Section 9 SIGN OFF

This section is to be completed by all parties noted below once the review has been formalised, typed and all parties have had a chance to read and agree to the record of the meeting.

Performance Review read and agreed by :

Employee:

Name :

Position :

Signature :

Date : / /

Director Perth Boat School :

Name : Rhonda Stacy

Signature :

Date : : / /



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Section 10 PERFORMANCE REVIEW PROCESS EVALUATION

Congratulations on the successful completion of the employee performance review process. In an effort to ensure the effectiveness of the performance review process your feedback is invaluable in continuous improvement. Please take the time to complete this evaluation and forward it to CEO within two days.

Thankyou

Name:(Optional)

1. Did you receive at least one week notice of the performance review, including a blank form to complete? Did you receive sufficient information regarding the performance review process prior to the meeting?		
Please discuss: 		
2. Did the meeting involve open and honest two-way discussion to agree on: <i>(please tick Yes or No below)</i>		
Item	Yes	No
i. Job role and job description		
ii. Key performance indicators		
iii. Training and professional development needs		
iv. What is expected of you		
v. How your supervisor could support you further		
vi. What additional work environment items could help you further		
vii. Agreed outcomes and actions		
Please discuss: 		
3. Are you satisfied that you were given sufficient levels of feedback throughout the performance review cycle to enable you to understand how well you were performing in relation to your agreed job expectations?		
Please discuss: 		
4. Are you satisfied with the level/type of communication during your performance review meeting? Did you feel supported during the review meeting?		
Please discuss: 		



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5. Are you satisfied that the review of your performance development was linked to operational plans?
Please discuss:
6. Are you satisfied that you were given ample opportunities to put forward your views, needs, requirements or concerns at every step of the process?
Please discuss:
7. What did you like most about the performance review process?
Please discuss:
8. What did you like least about the performance review process?
Please discuss:
9. What did you like to see changed about the performance review process? Why?
Please discuss:
10. Please make any other general comments or suggestions

Thankyou for your cooperation.