



Performance Evaluation and Development Procedure

Procedure Number
WCDHB-HR-0023

Version Nos:
5

1. Purpose

The West Coast District Health Board (WCDHB) will follow this Procedure to ensure that there is a clear process for the formal evaluation of all WCDHB staff with goals of developing and improving employee's performance and formulating Individual Development Plans.

2. Application

This Procedure is to be followed by all staff throughout the WCDHB.

3. Definitions

There are no definitions associated with this Procedure.

4. Responsibilities

For the purposes of this Procedure:

The relevant *Manager* is required to:

- ensure all staff that they are responsible for have their performance appraised annually on their anniversary date or more frequently as required.

The *Employee* is required to:

- participate in the performance review process and remind managers if this review is outstanding

5. Resources Required

- WCDHB Performance Review and Development Plan Form
- Any other relevant clinical Performance Review tools

6. Process

- 1.00 WCDHB is committed to providing constructive feedback to staff and supporting them in their development.
- 1.01 All performance appraisals must be fair, consistent and objective, and evaluate the performance of staff against pre-determined objectives and competencies.
- 1.02 All staff shall have their performance appraised by their Manager on an annual basis. However, this does not abdicate Manager's from their responsibility to give ongoing regular feedback to their staff.
- 1.03 All performance appraisals are confidential and are to be used only for the purposes stated within this Procedure.
- 1.04 The primary focus should be on the conversation itself rather than the performance review being considered as a prescriptive process focussing on the tools.



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- 1.05 The appraisal meeting will consider the level of staff performance over the previous 12 months measured against the Individual Development Plan set at the last performance appraisal as well as the performance specification in the position description and other clinical codes of practice.
- 1.06 The appraisal meeting will also consist of a general conversation reflecting on the last 12 months as well as looking towards the next 12 months utilising the questions covered in the Performance Review and Development Plan Form.
- 1.07 The appraisal meeting should also be used to spend time developing a new Individual Development Plan focussing on the next 12 months.
- 1.08 The Individual Development Plan focuses on the following:
- i. Goals – what will be achieved
 - ii. Performance Objectives – what is the employee going to do
 - iii. Competencies – what will be learned
 - iv. Key Steps for Achievement – How will the employee go about executing/delivering the objectives
 - v. Resources and Support – What resources may be needed to deliver the objectives
 - vi. Performance Indicator/Measure – How the employee will know when they have achieved the objective
 - vii. Time Frame – What are realistic time goals
- 1.09 The outcome of the appraisal will be documented on the Performance Review and Development Plan form and on additional notes where required.
- 1.10 As an outcome of the performance appraisal, the Manager may decide to recommend a remuneration increase.
- 1.11 The Manager and staff member will sign the Performance Review and Development Plan form and a copy will be given to the staff member with another copy forwarded to Human Resources for placement on the staff member's personal file (held by the Payroll Department)
- 1.12 Any Training and Development needs identified as an outcome of the appraisal will be discussed by the Manager with the relevant General Manager and Learning and Development Coordinator where required. A Training and Development Plan can be developed where required.
- 1.13 If the staff member disagrees with anything stated on the Performance Review and Development Plan form they are allowed to note this disagreement in writing. Alternatively, they may formally request (in writing) that the General Manager of the service:
- review all relevant documentation pertaining to the appraisal and the performance of the staff member over the last 12 months;
 - meet with the staff member to determine exactly their point(s) of disagreement, and ascertain what they require by way of resolution;
 - meet with the Manager to determine exactly their point(s) of disagreement, and ascertain what they require by way of resolution;
 - The General Manager will make the final decision as to any alteration to the Performance Review and Development Plan form. This decision will be put in writing and copied to the staff member and the appropriate manager.



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- 1.14 As an outcome of the performance appraisal, the Manager may decide to recommend a salary increase and will adhere to any requirements stipulated in the relevant Collective Employment Agreement where applicable.
- 1.15 The Manager will complete the WCDHB Salary Review Form and forward this to the appropriate General Manager where required, who will consider the request and will make a decision.
- 1.16 If the request is approved the Manager will inform the employee and send the completed Salary Review Form to the Human Resources Department.
- 1.17 The Human Resource Department will action a salary increase letter and will send a copy of this letter to the employee, the manager and the Payroll Department.
- 1.18 The Payroll Department will action the salary increase as soon as practicable.

7. Precautions And Considerations

- ➔ All performance appraisals must be fair, consistent, objective and evaluate the performance of staff against pre-determined objectives.
- ➔ Managers have a responsibility to provide regular, ongoing, constructive feedback to their staff.
- ➔ All performance appraisals are confidential and are to be used only for the purposes stated within this Procedure.
- ➔ Managers must adhere to the provisions in the relevant Collective Agreement (where applicable)

8. References

There are no references associated with this Procedure.

9. Related Documents

WCDHB Salary Review Form

Revision History	Version:	5
	Developed By:	Corporate Services: HR
	Authorised By:	Chief Executive
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