

# Staff Development Reviews (SDRs): Performance Plans

Online Module in OneCouncil

# Purpose

## **To outline:**

- Why do we perform SDR's?
- Part A – review of the previous 12 months (Will be online in 2024/25)
- Part B (& C) – 'Performance Plans'
- User Guide
- Video Tutorial
- OneCouncil module 'run through'

# Why do we perform SDR's?

- All employees that are employed for longer than 1 year must have their performance reviewed each year as per the *Local Government Act 1995* (WA)
- The City of Kwinana conducts this through the annual Staff Development Review process

*“s. 5.38 Annual review of employees’ performance*

*(2) The CEO must ensure that the performance of each other employee who is employed for more than 1 year is reviewed.”*

- This process is captured within the Staff Development Review Policy

# Why do we perform SDR's? *(continued)*

- The City has a genuine interest in the growth of its people and the SDR/Performance Plan are tools to determine and share goals for employees to meet in the upcoming year.
- In addition, a relevant and meaningful discussion through the process will also assist staff to:
  - Have a clear understanding of the requirements of their role;
  - Have a clear understanding of how their role fits into the activities of the organisation;
  - Have or develop the appropriate skills and competencies to perform their role effectively;
  - Are given a clear set of goals and instructions; and
  - Have a clear understanding of their manager's expectations of their performance in their role.

# Why do we perform SDR's? *(continued)*

- SDRs also play a major role in broader business planning strategies, reinforcing:
  - The link between individual objectives to strategic/business plans;
  - That all divisions, sections and individuals are working towards the same corporate strategies; and
  - The Staff Development Review is in effect a “mini” business plan for each individual.

# The Former SDR Process

- Formerly the SDR process was only performed by using a pdf form/a hard-copy, paper version and it consisted of:
  - Part A – this is an annual review of the employees current Key Performance Indicators (KPIs)
  - Part B – this is when new KPIs are issued (or some may be ongoing) for the year ahead
  - Part C – Outlined Training and Development opportunities and goals

# The New SDR Process

This consists of:

- Part A – Reviewing the Performance for the year that's been
  - This will become the online SDR process in 2024/25
- Part B – Completing the Performance Plan
  - This involves setting 'Performance Goals' and 'Development Goals'
  - Ideally performed by late October
- Face to face meetings still need to be had with the employee/s

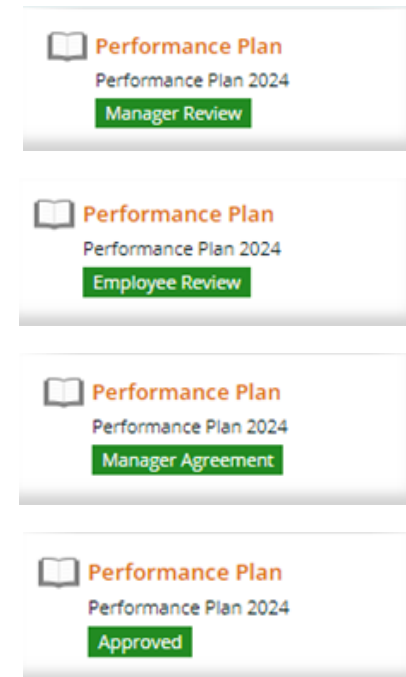
# The SDR Process 2023/24: Part A

- Part 'A' is reviewing the KPIs over the previous 12-month period
- These are performed by using a pdf form. This Part will consist of:
  - a. Reviewing the 'Organisational Objectives' (or KPIs) that are set by the CEO and if they were achieved by the agreed actions of the employee in that year
  - b. Reviewing the 'Individual Objectives' (or KPIs) that are set by agreement between the employee and their direct line manager
  - c. Listing any **major achievements** of the employee that occurred during the past year
  - d. The manager being provided the opportunity to provide an overall comment on the employee's performance
  - e. The employee also being provided the opportunity to provide an overall comment on their performance
- This needs to be performed by COB Friday 1<sup>st</sup> September 2023

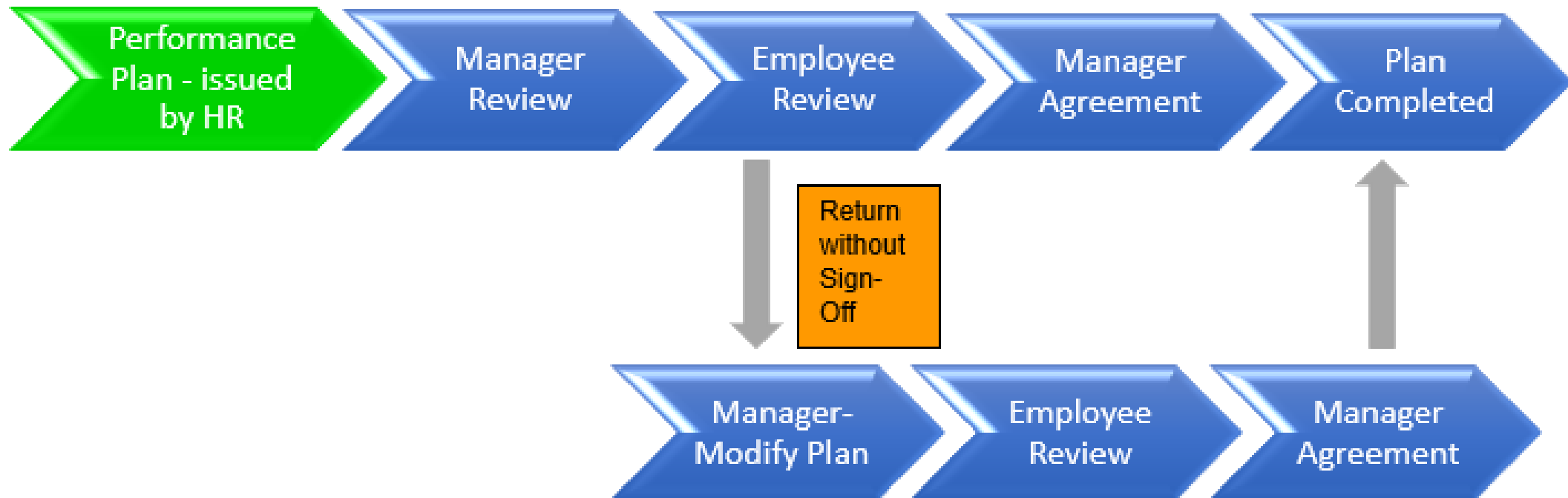


# The SDR Process 2023/24: Part B (Performance Plan)

- There are four different stages / statuses:
  - Manager Review
  - Employee Review / Sign-Off
  - Manager Agreement / Sign-Off
  - Approved Plan / Completed



# The SDR Process 2023/24: Part B (Performance Plan)



# The SDR Process 2023/24: Part B (Performance Plan)

## **Performance Goals**

These are either:

- Corporate KPIs – Set by the CEO (and filtered down to meet the City's organisational objectives)
- Individual Goals for the next 12 months

## **Development Goals**

These are either:

- Set by the City to increase the capacity/develop the workforce (Corporate Goals)
  - These are different and dependent on the team/role e.g. Conflict Situation Training, Mental Health First Aid, IAP2 Training
- Development / Training required over the next 12 months
- Listing Conferences / Seminars that are relevant to the role in the next 12 months
- Listing Development / Training opportunities over the next number of years

# The SDR Process 2023/24: Part B (Performance Plan)

## Performance Goals

Corporate

- *For Corporate Performance Goals:*
  - REFER to the instructions in the 'Supporting activities' box
  - List the actions that need to be undertaken by the employee (or how the Performance Goal is measured) in the 'More Information' box to reach the goals
- *For Individual Performance Goals:*
  - REFER to the instructions in the 'Supporting activities' box
  - Provide a brief description in the 'Description' box (100 characters maximum)
  - List any further information in the 'More information' box
    - What needs to take place, by when and by whom to achieve these goals
- Add / delete any additional individual goals as needed
- **Don't adjust the goal's 'start date' and 'end date' unless needed**
- **Don't adjust the 'rating profile'**
- Refer to the User Guide if needed

# Individual Performance Goal Example

Performance Plan  
Performance Plan 2024  
Manager Review

Performance Goals  
6 performance goals

Development Goals  
9 development goals

Appraisal Schedule  
1 schedule item

History

← Performance Goals

Performance Goal

Cancel Save Save and Next

Details

Select performance goal from catalogue

Performance Goal  
Enter a Performance Goal for the next 12 months (Delete text i... ▾)

Description \*  
Example Performance Goal

More Information  
Actions taken to achieve the example Performance Goal.

Supporting Activities  
INSTRUCTIONS:  
1. DESCRIPTION BOX - Enter your Performance Goal in the DESCRIPTION Box above (100 characters available) - Delete the existing text and ADD your text.  
2. MORE INFORMATION BOX - In your answer please indicate in the MORE INFORMATION Box above:  
- Additional information about the Performance Goal.  
- What specific goals do you have for the next 12 months?  
- What action will need to take place, by when and by whom to achieve these goals?

Start Date \*  
01-Jul-2023

End Date \*  
30-Jun-2024

Rating Profile \*  
Employee Performance & Development Review Rating Guidelines

# The SDR Process 2023/24: Part B (Performance Plan)

## Development Goals

- *Corporate Development Goals:*
  - Review and no further action is required
- *Individual Development Goals:*
  - REFER to the instructions in the 'Supporting activities' box
  - Provide a 'description' of the Development Goal (100 characters maximum)
    - These may be related to the need for the development / training
    - Training / Development objectives
    - Best way to achieve the training objectives
    - The importance of the Training / Development
  - Enter any further information that is needed on the Development Goal in the 'More information' on the goal that is required
- Don't adjust the goal's 'Start date' and 'End date' unless needed
- Don't adjust the 'Rating profile' or 'Objective type'

# Individual Development Goal Example

← **Development Goals**

**Development Goal** Cancel Save Save and Next

^ **Details**

Select development goal from catalogue

Development Goal  
Enter a Development Area/Training Need here. (Delete text in ...)

Description \*  
Enter a Development Area/Training Need here. (Delete text in DESC...)

More Information

Supporting Activities  
INSTRUCTIONS:  
1. List a short summary of the Development Area/ Training Need in the DESCRIPTION BOX above (100 characters available). DELETE the existing text and ADD your text.  
2. In your answer please indicate in the [MORE INFORMATION] box:  
- What is the Development Area/ Training need?  
- What is the training objective / reason for the Training/Development?  
These could include: (Note, can select more than one)

Start Date \*  
01-Jul-2024

End Date \*  
30-Jun-2025

Rating Profile \*  
Development Goals [Rating Guidelines](#)

Objective Type

# Performance Plan in Operation

- The KPIs/goals inserted into the 'Performance Plan' evolve into the measures in the following SDR process
- The Employee's interface during the review period:
  - Accessible via 'My HR and Pay' in OneCouncil
  - Goals can be viewed at any time
  - Goals can be updated with progress
- The Manager's interface during the review period:
  - Accessible via 'My Team'
  - Goals can be viewed at any time
  - Goals can be edited at any time
  - Once updated by the employee, a goal's progress can be confirmed by the Manager
  - **We are unable to set notifications for progress reports on individual goals – please set reminders as needed**



# Performance Plan in Operation

**Employee details**

**Peter Parker (2)**  
Graduate Accountant, Finance (City of Kwinana)

- Training  
0 training requests
- Performance Goals**  
0 requiring attention
- Development Goals  
0 requiring attention
- Conversations About Me  
0 conversations in progress
- Appraisals  
SDR 2024  
3 Appraisals incomplete
- 360 Reviews
- Competencies  
No current competencies
- Skills  
No current skills
- Career Ambitions  
No career ambitions recorded
- Gap Analysis  
Graduate Accountant, Finance (Cit...  
0 gaps identified
- Assessment of Potential  
Performance Potential not record...  
Flight Risk not recorded
- Notes  
No notes recorded

**Performance Goals** + Add

5 records.

**test Goal added after approval** IN PROGRESS 75%  
CONFIRMED

01-Jul-2023 to 30-Jun-2024

Ad hoc

[Update progress](#)

**Customer** IN PROGRESS 50%  
CONFIRMED

01-Jul-2023 to 30-Jun-2024

Planned | Officers | Customer

Provide a customer centric approach to deliver an improved customer and community experience.

[Corporate](#) [Rolled Forward To Next Plan](#)

[Update progress](#)

**Customer** IN PROGRESS 50%  
CONFIRMED

01-Jul-2023 to 30-Jun-2024

Planned | Officers | Customer

Provide a customer centric approach to deliver an improved customer and community experience.

[Corporate](#) [Rolled Forward To Next Plan](#)

[Update progress](#)

**Health & Safety** IN PROGRESS 65%  
UNCONFIRMED

01-Jul-2023 to 30-Jun-2024

Planned | Officers | Health & Safety

Make safety a priority within the Business Unit, proactively promote safe behaviour and injury prevention.

[Corporate](#) [Rolled Forward To Next Plan](#)

[Update progress](#)

**Health & Safety** IN PROGRESS 65%  
UNCONFIRMED

01-Jul-2023 to 30-Jun-2024

Planned | Officers | Health & Safety

Make safety a priority within the Business Unit, proactively promote safe behaviour and injury prevention.

**Analytics**

**Performance Goal Progress**

Goal Name	Progress Status	Percentage Complete
test Goal added after approval	IN PROGRESS 75%	75%
Customer	CONFIRMED	50%
Customer	CONFIRMED	50%
Health & Safety	UNCONFIRMED	65%
Health & Safety	UNCONFIRMED	65%

**Development Goal Progress**

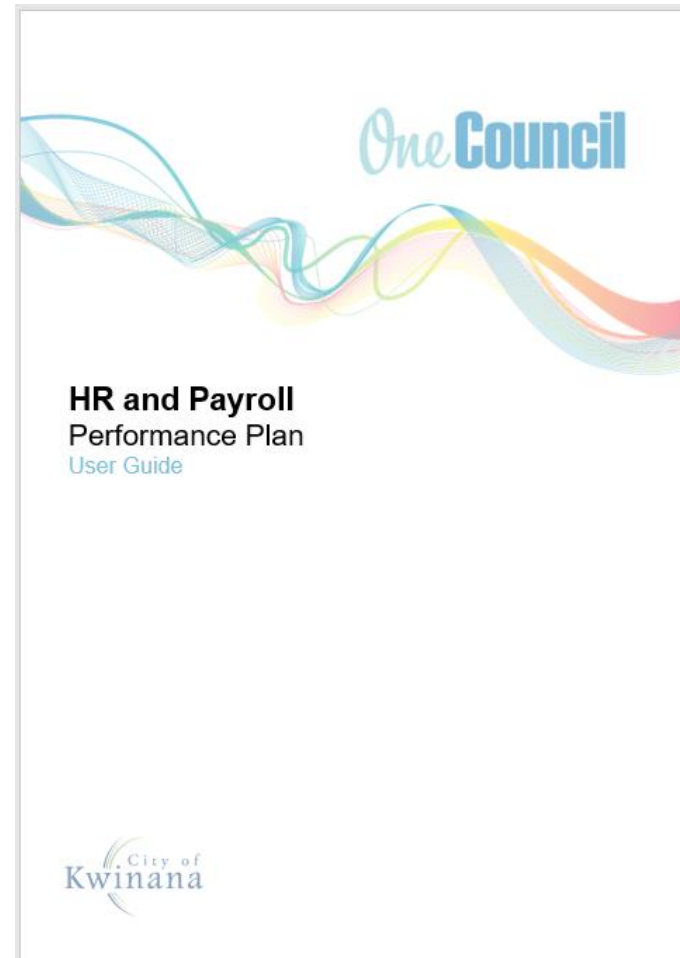
**There is no data to render this chart.**

**Gap Summary**

**There is no data to render this chart.**

[Analytics](#) | [Summary](#) | [Talent Profile](#)

# Guidance Materials: User Guide



# Guidance Materials: Performance Plan Video Guide

The screenshot displays a user dashboard for a performance management system. At the top, there is a navigation bar with the 'cia' logo, a user profile for 'Callum Malloch-Smith', and an 'Enterprise Search' bar. Below the navigation bar, the user's name 'MY KWINANA' and a notification count '2' are visible. The main content area is titled 'Home' and features several widgets:

- My Tasks:** A list of tasks with a search bar and filters. The list includes:
  - Peter Parker (2) Performance Plan 2025 (Employee Performance Plan: Manager...)
  - Peter Parker (2) Final Probation (Employee Appraisal: Manager Assessm...)
  - Peter Parker (2) Interim Probation (Employee Appraisal: Manager Assessm...)
  - Peter Parker (2) Initial Probation (Employee Appraisal: Manager Assessm...)
  - Peter Parker (2) Performance Plan 2026A total of 9 tasks is shown.
- Forms:** A section for forms with a 'Warnings' tab. It shows '13 completed forms' and '0 Draft forms'.
- My Team:** A section for team management with tabs for 'HR', 'Timesheets', and 'Leave'. It displays:
  - 1 fixed term contract ending soon (Management Accountant)
  - 14 performance goals (Management Accountant)
  - 21 development goals (Management Accountant)
  - 2 performance plans required (Management Accountant)
  - View Team AnalysisA total of 78 items are requiring attention.
- Quick Links:** A row of icons for 'Ci in the Cloud', 'Attachment Entities', 'My Reports', 'Customer Community', 'Help', and 'TechnologyOne University'.
- uni:** A section for 'uni' with the text 'Try the new TechnologyOne University'.

At the bottom of the dashboard, there is a 'More (4)' button. The footer contains the text 'Powered by TechnologyOne | Enterprise software, incredibly simple' and links for 'Discover 2028' and 'Feedback'.

# Questions?