

<b>Name of Policy</b>	<b>Performance Management for Casual Staff Program Policy</b>	
<b>Description of Policy</b>	<i>This policy covers the purpose, requirements and procedures of the Performance Management for Casual Staff policy and procedures for all casual staff at ACU.</i>	
<input checked="" type="checkbox"/> New Policy	<input type="checkbox"/> Revision	
<b>Description of Revision</b>	<i>Delete</i> <i>Please type brief description of the deletion and specify information to be deleted</i>	
	<i>Insert</i> <i>Please type brief description of the insert and specify information to be inserted</i>	

### Human Resources Directorate

<b>Policy and Revision Number</b>	
<b>Original Effective Date</b>	
<b>Review Due Date</b>	
<b>Revision Effective Date</b>	
<b>Senate Approval Date</b>	
<b>Vice Chancellor's Approval Date</b>	06 March 2008

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## **1. Background Information**

The University recognises that excellence and quality need to be positively supported with relevant programs and strategies designed to assist staff to meet their individual as well as their collective work goals.

## **2. Policy Statement**

The Performance Management for Casual Staff Program is an important tool for planning and monitoring performance. It provides a means for developing and evaluating the work performance of casual staff to ensure that:

- Casual staff have a clear and agreed sense of their work role and their individual performance objectives;
- a process is set in place for reviewing the achievements and performance of individual casual staff members against performance objectives and for providing feedback on performance.

## **3. Policy Purpose**

The purpose of this policy is to assist casual staff and their nominated supervisors to implement the Performance Management for Casual Staff Program effectively in order to optimise the benefit of the program both for the University and its staff.

This document is intended to fully explain the procedures related to the policy, so that nominated supervisors and staff have a clear and precise understanding of its nature.

## **4. Application of Policy**

The Performance Management for Casual Staff Program (PMCSPP) applies to all General and Academic staff who are employed on a casual basis for 7 hours or more (1 day) per week (or equivalent) for a period of no fewer than 8 weeks (continuously) up to a maximum of 36 weeks (\* equivalent of 9 months) – this period to be known as the Employment Period.

(\* ) Where it is envisaged that the casual staff member will be employed for a period greater than 36 weeks (9 months) continuously, the Performance Development Program (PDP) for General Staff and the Performance Review Planning Program for Academic Staff shall apply.

## **5. Procedures**

### **5.1 Performance Management for Casual Staff - The Process**

There are four sequential stages involved in the Performance Management for Casual Staff process:

1. Performance Planning – where performance expectations of the staff member are discussed, agreed and documented; ( See: Attachment 1, Section 1)
2. Ongoing informal feedback and support during the Employment Period;
3. Modifying and adjusting the Performance Plan (as required, if the nature of the tasks substantially change); and,
4. Performance Evaluation - where the performance and achievements of the casual staff member are evaluated and documented. (See: Attachment 1, Section 3)

Note: the Performance Plan prepared at the commencement of the contract and the Evaluation of performance completed at the conclusion of the contract are recorded on the same form – *the Planning and Evaluation Form* (See: Attachment 1).

### 5.1.1 Performance Planning

In the context of the functional unit / school management plan, the nominated supervisor is required to develop a performance plan with the eligible casual staff member (as outlined above) at the commencement of their contract. Consultation with the staff member is expected. Performance planning for casual staff involves the following steps:

#### **Section 1: Performance Planning** (at the commencement of the Employment Period)

- the key tasks to be completed by the casual staff member are jointly defined, agreed and documented in Section 1, Step P(i), of the *Planning and Evaluation Form*;
- the level of IMPORTANCE for a range of characteristics is identified in Section 1, Step P(ii) of the *Planning and Evaluation Form* (the characteristics are listed in Section 3 – IMPORTANCE on page 2 of the Form);

#### **Section 2: Performance Support**

- the key activities/learning tasks which will support the casual staff member's performance of the set tasks are jointly defined, agreed and recorded in Section 2, Step P(iii) of the *Planning and Evaluation Form*; and,
- both the casual staff member and the nominated supervisor sign (page 1) of the *Planning and Evaluation Form*.

The nominated supervisor retains the original *Planning and Evaluation Form* and provides the casual staff member with a copy, and a copy is forwarded to the relevant campus Human Resources Consultant for filing on the staff member's personnel file.

### 5.1.2 Providing Informal Feedback and Support

While a formal review of the staff member's progress and performance takes place at the end of the Employment Period, monitoring of performance and informal advice and feedback should be provided regularly throughout the period.

### 5.1.3 Modifying and Adjusting the Performance Action Plan

Where circumstances require change, the Performance Plan may be modified accordingly in consultation with the staff member. In such cases, the variation is then signed by both the supervisor and the staff member and dated and then appended to the original Performance Plan. A copy is provided to the casual staff member and the relevant campus HR Consultant.

### 5.1.4 Evaluating Performance and Achievements

A formal performance review and evaluation is conducted by the nominated supervisor (or the assistant supervisor) at the conclusion of the Employment Period. The review focuses on the casual staff member's performance and achievements during the Employment Period.

#### 5.1.4.1 Performance Evaluation

At the end of the Employment Period, the nominated supervisor will review the performance and achievements of the casual staff member, record their conclusions on the *Planning and Evaluation Form* and discuss the outcomes with the staff member.

When assessing and reviewing the performance of the casual staff member, the nominated supervisor takes into consideration any modifications to the original Performance Plan. The report should focus on overall performance across the range of tasks set for completion during the Employment Period.

The steps involved in assessing performance of a casual staff member are as follows:

### **Section 3: Performance Evaluation**

**Step E (i):** The nominated supervisor considers the degree to which the staff member has met expectations in relation to the IMPORTANT characteristics identified at the commencement of the Employment Period and records this in Section 3, Step E(i) on the *Planning and Evaluation Form*, using the following scale:

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Does not meet expectations	Some, but not all expectations met	Meets expectations	Exceeds expectations	Consistently exceeds expectations

**Step E (ii):** The nominated supervisor gives her/his overall assessment of the staff member's performance using the following scale and can add any other relevant comments:

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<i>Did not meet expectations</i>	<i>Satisfied some, but not all expectations</i>	<i>Satisfied expectations and made satisfactory contributions in the role.</i>	<i>Exceeded most expectations and made a valued contribution.</i>	<i>Consistently exceeded expectations and made an outstanding contribution.</i>

The nominated supervisor then meets with the casual staff member to discuss the evaluation of their performance. The performance review discussion should focus on:

- the performance expectations as previously agreed and recorded in the Performance Plan;
- extenuating or other circumstances that may have impacted on performance;
- identifying those areas where tasks were achieved or not achieved;
- any challenges impacting on performance during the performance review cycle.

The casual staff member will be given the opportunity to comment on and record their own views of their achievements (Step E (iii) on the *Planning and Evaluation Form*).

The nominated supervisor and the staff member both sign the completed form as sighted, or the supervisor notes on the form that the staff member has been given the opportunity to see and sign the form.

At the conclusion of the Employment Period, the nominated supervisor retains a copy of the completed *Planning and Evaluation Form* and provides the staff member with a copy. The original form is forwarded to the relevant campus Human Resources Consultant for filing on the staff member's personnel file.

### **5.2 Record Keeping and Privacy**

All matters relating to a staff member's performance evaluation are strictly confidential. Care, therefore, should be exercised when forwarding performance evaluation documents between campuses and offices. Such documentation should be marked 'confidential' and completed *Planning and Evaluation Forms* should be forwarded to the relevant campus HR Consultant. All such documents will be placed on the staff member's personal file.

### **6. Policy Review**

The University will develop a process for reviewing the effectiveness of the Performance Management for Casual Staff process established by this Policy. Where applicable, the review will take account of necessary changes to other relevant University policies and procedures. Any staff member wishing to suggest improvements to the Performance Management for

Casual Staff Policy and Procedure is invited to forward their suggestions to the Director, Human Resources.

**7. Further Assistance**

Any staff member who requires assistance in understanding the Performance Management for Casual Staff Policy and Procedure should first consult their nominated supervisor. Should further policy advice be needed, they should contact the Human Resources Consultant responsible for their campus.

**8. Attachment**

Performance Management for Casual Staff *Planning and Evaluation Form*.



**Performance Management for Casual Staff  
PLANNING AND EVALUATION FORM**

Staff Member - Name		Staff No.
Location		
Work Unit		
Nominated Supervisor		
Assistant Supervisor		
Casual Contract Period	From	To

**SECTION 1: PERFORMANCE PLANNING**

**Step P(i)**

At the beginning of the contract period, the supervisor lists, in priority order, the tasks to be completed by the staff member during the Employment Period and indicates an expected completion date.

Task	Description of Task	Expected completion date
1.		
2.		
3.		
4.		
5.		

**Step P(ii)**

For each of the eight factors listed in Section 3 (see list on page 2 of this Form), please indicate at the commencement of the Employment Period, how IMPORTANT it is for the employee to display these characteristics (on the scale of 1 Low to 5 High).

**SECTION 2: PERFORMANCE SUPPORT**

**Step P(iii)**

What activities/learning tasks need to be completed by or provided to the staff member so that the tasks can be completed as required?

Name and Description of Activity	Expected completion Date

Staff Member Name	Nominated Supervisor
Signed	Signed
Date	Date

After endorsement, the nominated supervisor retains the original Planning and Evaluation form and provides the staff member with a copy. The nominated supervisor also sends a copy to the relevant campus HR Consultant for filing.

## SECTION 3: PERFORMANCE EVALUATION

### Step E(i)

At the conclusion of the Employment Period, the supervisor meets with the staff member to discuss performance achievements and outcomes during the contract period. At this stage, the supervisor rates the degree to which the casual staff member met expectations (PERFORMED) during the Employment Period (using the scale below).....

STEP P(ii): IMPORTANCE						STEP E(i): PERFORMANCE					
1 Low	2 L-M	3 Med	4 M-H	5 High	NA	Performance Factors	1 Did not meet expectations	2 Met some, but not all expectations	3 Met expectations	4 Exceeded expectations	5 Consistently exceeded expectations
1	2	3	4	5			Contribution to the work unit's productivity	1	2	3	4
1	2	3	4	5		Ability to develop relationship with co-workers	1	2	3	4	5
1	2	3	4	5		High professional and ethical standards	1	2	3	4	5
1	2	3	4	5		Ability to identify causes of problems and generate practical solutions	1	2	3	4	5
1	2	3	4	5		Ability to express ideas effectively in both verbal and written communication	1	2	3	4	5
1	2	3	4	5		Willingness to participate as a team member	1	2	3	4	5
1	2	3	4	5		Ability to display initiative	1	2	3	4	5
1	2	3	4	5		Knowledge of ACU strategies, policies and procedures	1	2	3	4	5

### Step E(ii)

**OVERALL ASSESSMENT** - Please indicate (by circling the appropriate number below) your assessment of the staff member's overall performance during the Employment Period with regard to the tasks listed on page 1.....

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<i>Did not meet expectations</i>	<i>Satisfied some, but not all expectations</i>	<i>Satisfied expectations and made satisfactory contributions in the role</i>	<i>Exceeded most expectations and made a valued contribution</i>	<i>Consistently exceeded expectations and made an outstanding contribution</i>
<p><i>Supervisor's Overall Comment:</i></p>				

### Step E(iii)

*Staff Member's Comments*

*Staff Member Name*

*Nominated Supervisor*

*Signed*

*Signed*

*Date*

*Date*

At the conclusion of the Employment Period, the nominated supervisor sends the completed original Planning and Evaluation form to the relevant campus HR Consultant for filing. The nominated supervisor retains a copy and provides the staff member with a copy.