

MANAGER PREPARATION FOR PERFORMANCE CONVERSATION

How to access the PRD system

Open in a browser > <https://successfactors.newcastle.edu.au>

Review and review goals during the PRD cycle

- > Record Performance Goals following PRD conversation
- > Comment on Performance Goals during Ongoing Conversations phase of the PRD cycle
- > Review and rate Performance Goals at 'Year End Review'.

Goal Setting - View Performance Goals

Ongoing Conversations - Review and comment on goal progress

Year End Review - Reflect on Performance and Leadership

MANAGER PREPARATION FOR PERFORMANCE CONVERSATION

This form is designed to support an effective PRD conversation between a Manager and their Staff Member when:

- Setting Performance Expectations; or
- Agreeing Performance Goals; or
- Reviewing Performance; or
- A combination of all these elements of a PRD conversation

Specifically the Manager PRD Conversation guide assists Managers in:

	MANAGER'S NAME
	STAFF MEMBER'S NAME
	DATE

LOOKING BACK		Manager's preparatory notes for performance conversations. Prepare for the conversation with staff member by reviewing documents, gaining staff input and drawing conclusions
REVIEW	1. Review the staff member's job description/workload	<input type="checkbox"/>
	2. Review performance expectations previously discussed and agreed upon.	<input type="checkbox"/>
REFLECTION	3. Review performance goals in the PRD system	<input type="checkbox"/>
	4. Review data, documentation or reports that provides evidence of performance	<input type="checkbox"/>
	5. Review staff member's self assessment of their achievements vs agreed goals	<input type="checkbox"/>
ASSESSMENT	6. Determine areas of excellence and note examples	<input type="checkbox"/>
	7. Determine developmental opportunities and develop specific suggestions to discuss with your staff member	<input type="checkbox"/>
	8. Evaluate performance for the review period and summarise feedback	<input type="checkbox"/>
LOOKING FORWARD		Preparatory Notes for Performance Expectations & Goal Setting Conversations
REVIEW	1. Review the staff member's position description/workload	<input type="checkbox"/>
	2. Review performance expectations that have been previously discussed and reassess for year ahead.	<input type="checkbox"/>
REFLECTION	3. Review School/Unit Corporate Plan for the year ahead	<input type="checkbox"/>
	4. Review draft performance goals submitted by staff	<input type="checkbox"/>
CONCLUSION	5. Consider staff plans for the year ahead, e.g. leave, secondments etc	<input type="checkbox"/>
	6. Draft suggested performance goals for staff member	<input type="checkbox"/>
AFTERWARDS		Finalise conversation and record outcome in the PRD system
RECORD	1. Input Performance Review summary in PRD system	<input type="checkbox"/>
	2. Review performance goals in the PRD system	<input type="checkbox"/>

LOOKING BACK	PERFORMANCE REVIEW CONVERSATION	
OPENING Set the scene – welcome the staff member; explain the purpose and benefits of the review; provide an overview of the process, and reinforce the shared responsibility for the PRD process		List key talking points
START WITH STAFF SELF ASSESSMENT & DISCUSS Allow staff to review own performance, highlights and lowlights. Seek clarification and understanding. Refer to prepared notes		Make notes
PROVIDE FEEDBACK ON PERFORMANCE & DISCUSS Review the progress made toward performance goals; share your opinion of successes and concerns; discuss any special circumstances that may have influenced performance		List key talking points
ACHIEVE CONSENSUS & CONCLUDE Summarise review of performance and confirm your confidence in the employee's ability to either continuing performing well or improving. End on a positive note		Record outcomes
LOOKING FORWARD	PERFORMANCE GOAL SETTING CONVERSATION	
OPENING Provide context for year ahead, explain how staff member contributes to University strategic goals		List key talking points
START WITH STAFF GOALS & DISCUSS Listen to staff members ideas and aspirations for the year ahead, encourage staff to challenge themselves to improve performance and meet set goals		Make notes
PROVIDE FEEDBACK ON GOALS & DISCUSS Provide encouragement and advice to strengthen the quality of goals, ensure alignment with corporate plans and motivate staff to strive for excellence		List key talking points
ACHIEVE CONSENSUS AND WRAP UP Agree performance goals, commit to and support to their goals, recognise achievements and sign off		Record outcomes
DOCUMENT PERFORMANCE CONVERSATION Record performance summary in the PRD system	DOCUMENT PERFORMANCE CONVERSATION Record performance goals in the PRD system	