# Performance and Development Conversation Record

| Full name | Team | Role | Manager name |
|---|---|---|---|
|  |  |  |  |

Working together on performance and development goals builds a shared understanding of expectations and what success looks like.

Team members and managers should jointly agree on:

- a schedule for where and when goal setting; check-in conversations will happen, and when more formal reviews will take place, this could be your anniversary start date.
- how the goals should be written; who should do the first draft
- and where these templates will be saved.

Add as many rows as you need to this document. Refer to Performance and development resources on the Portal for guidance.

## Agreement

| How often will we check in? | How we will check in – by phone, in person | When will we do the formal review? |
|---|---|---|
|  |  |  |

## Instructions

Step 1: Set your development goals – what will you achieve and what do you need to develop?

Step 2: Log ongoing discussions and decisions about your performance and development goals

Step 3: Looking back – review and summarise with rating your work.  Sign and file notes.

# Step 1: Setting your performance and development goals

| Set goals for | Reference key documents: | Goals should |
|---|---|---|
| • contribution,<br>• behaviours and<br>• development | • Job Description<br>• Team goals/Work plans<br>• Values, Leadership QBEs, AFAC Capabilities, Standard of Conduct | • Clarify expectations (use SMART)<br>• Link to team and organisation goals<br>• Be clear what completion looks like |

| Your goals<br>(Give each one a number to help you track it) | Actions I will take, and how we will know I have succeeded | Due date |
|---|---|---|
| | | |

## Step 2: Checking in conversations

- These regular and respectful conversations are the core of the performance and development process.
- During these check-ins, talk about your progress, accomplishments, barriers and what support you need to achieve the goals you developed in Step 1.
- Write down and save key decisions and discussions using this template. Where it is saved is a joint decision with your manager (Add extra rows as needed)

| Goal # | Your notes about how you are doing | Manager's notes | Date |
|---|---|---|---|
|  |  |  |  |

# Step 3: Review and summary

This section is for you to write a more formal review of your progress: your achievements, progress towards meeting your goals, additional accomplishments or contributions and what you have learned. Make a new copy of this form every time you do a formal review.  This should occur minimum 6 monthly.

| Time period | | | | |
|---|---|---|---|---|
| From: | | To: | | |

| What went well: summarise achievement or progress toward meeting agreed goals | Manager's notes |
|---|---|
| | |

| What could have been better? Identify any unexpected barriers or challenges | Manager's notes |
|---|---|
| | |

| Overall rating discussed and agreed for this period (circle one). Definitions are listed on the following page | | | | | |
|---|---|---|---|---|---|
| Unacceptable | Below requirements | Achieves requirements | Exceeds requirements | Significantly exceeds requirements | Unable to rate |
| Your signature | | Date | Manager's signature | | Date |
| | | | | | |

## Ratings – For review and summary (Step 3)

Please consider any factors that may have affected your ability to achieve your goals.

**Significantly exceeds requirements**

- Delivers all of the requirements of the role, and
- Exceeds all measures for all objectives set.

**Exceeds requirements**

- Delivers all of the requirements of the role, and
- Delivers all and exceeds some measures of the objectives set.

**Achieves requirements**

- Delivers all of the requirements of the role, and
- Delivers all measures of the objectives set.

**Below requirements**

- Delivers some of the requirements of the role, and
- Delivers some of the measures of the objectives set.
- Improvement is required.

**Unacceptable**

- Fails to deliver most of the requirements of the role, and
- Fails to achieve most measures of the objectives set.