



Uniting Church in Australia  
SYNOD OF VICTORIA AND TASMANIA

# **Performance Planning & Development (PPD)**

## **A Guideline for Congregations**

## 1. Introduction

As an employer, we express the ethos of Christianity to love one another, to live justly and to seek the reconciliation and renewal of all creation by respecting ourselves and all whom we serve and employ. We strive to do so by:

- being inclusive
- acting and advocating for a just society
- working for peace and justice in the World
- having an openness to the wisdom of people of other faiths and views
- implementing environmentally sustainable practices.

UCA values justice, inclusion, compassion, shared leadership, respect, integrity, wise stewardship and innovation. By applying this ethos and these values through the management and engagement of all staff, the Synod strives to develop a work environment and culture which:

- provides meaningful and rewarding work for all
- is committed to child safety
- values and respects individual difference
- acknowledges, and where possible rewards, performance excellence
- provides a safe place for feedback and review
- gives appropriate support and encouragement
- is committed to productivity and efficiency
- promotes a healthy and sustainable work life balance
- supports and fosters professional growth and development.

### 1.1. Intention

The aim of the Performance, Planning and Development process is to enhance performance, nurture aspirations and demonstrate appreciation of the skills and abilities people bring to the workplace. It is intended to be a positive experience and is designed to support a flourishing work culture, where employees can be energised through participation, and where organisational systems and structures support individuals and teams.

This process provides an opportunity for:

- Performance: reflecting on the achievements and challenges of the past year
- Planning: planning aligned to congregation goals and strategies
- Development: exploring learning and development options

### 1.2. Focus Areas

- Review of previous year's achievements or contributions
- Alignment between current work performance and position descriptions, annual plans and performance expectations
- Working within the ethos and values of the Uniting Church in Australia
- Contribution to teamwork and team outcomes
- Competency ratings covering a range of competencies both technical, professional, managerial and interpersonal
- Work planning for the next PPD cycle
- Learning and development needs and plans
- Employee satisfaction and work/life balance
- Workplace environment and context.

## **2. Guidelines for staff members**

Performance planning and development is part of the ongoing process to ensure the organisation meets its overall goals and that employees are clear about the part they play.

Conversations about performance, planning and development can enhance self-awareness and help identify areas requiring clarification and support.

Prepare well for the PPD meeting. Consider each section in the template and make notes ready for discussion. Guiding questions include:

- have additional and ongoing responsibilities been required during the last 12 months?
- is the position description accurate and the role purpose clear?
- are additional competencies required?
- is interaction required with a broader range of people?
- is ongoing training and development available for staff working with children?
- is any new knowledge required?

A constructive performance conversation includes recognition of strengths and achievements as well as developmental input. Where areas for improvement are raised it is important to listen carefully, clarify with your manager exactly what is required of you, and to make sure that expectations are documented clearly in the PPD template. These expectations may form the basis of an agreed learning and development plan.

## **3. Guidelines for managers**

Employees generally attend the workplace with the best intentions. PPDs should not contain any surprises. In particular any performance issues or problems should not be raised for the first time at a PPD discussion. Performance issues should be addressed as they arise or as part of regular supervision and not 'saved' for this process.

Some staff may be anxious about this process. Managers have a responsibility to ensure that the process is positive and constructive from the outset.

Ensure the PPD meeting is held in a private, quiet environment and that there are no interruptions. The time for the PPD discussion should be scheduled not less than one week in advance. It is important that discussions are not rushed. It is recommended that you allow about one hour.

### **3.1. Discussion tips**

Introduce the discussion with a general question about how the staff member feels about their work for the last year, and what they feel has been the greatest or most satisfying workplace achievement. Listen carefully and allow employees plenty of opportunity to express their views.

Clear and positive acknowledgement of the staff member's achievements will assist planning for the next 12 months.

If performance outcomes do not always live up to your expectations it is important that you communicate this sensitively. Clear and specific feedback about how performance could be improved and areas for development that may assist is important. Make sure employees have the opportunity to contribute to developing solutions and/or creating learning plans.

It is also important to ensure that the PPD process covers the whole job and the full 12 month review period. This helps to ensure that the process is fair and that any particular problem area does not overshadow the PPD process.

#### 4. Roles & responsibilities

Who	Actions
(a) Manager*	<ul style="list-style-type: none"> <li>• provide the staff member with a copy of the relevant position description</li> <li>• provide the staff member with a PPD form</li> <li>• arrange a time for the PPD meeting giving notice of at least one week</li> <li>• make notes for discussion in each section of the PPD form</li> </ul>
(b) Staff member	<ul style="list-style-type: none"> <li>• list key responsibilities from their position description in PPD form</li> <li>• make notes for discussion in each section of the PPD form</li> </ul>
(c) Manager and Staff member	<ul style="list-style-type: none"> <li>• meet as arranged in a quiet setting which is free from interruptions</li> <li>• discuss each section of the PPD form taking into consideration notes of both manager and staff member</li> </ul>
(d) Manager	<ul style="list-style-type: none"> <li>• take into account employee perspective in each section and incorporates into the form</li> </ul>
(e) Manager and Staff member	<ul style="list-style-type: none"> <li>• sign the completed form</li> <li>• if for any reason the staff member does not sign the form then this should be noted by the manager together with reasons for lack of staff member signature</li> <li>• agree on the next review date</li> </ul>
(f) Manager	<ul style="list-style-type: none"> <li>• provide staff member with a copy of the signed PPD form</li> </ul>

\* The term 'manager' is used in a generic sense and may have another title including Director, Team Leader or Coordinator.