

Employee Name: _____ Review Date: _____

Position: _____ Last Review Date: _____

Division: _____ Next Scheduled Review: _____

Review Period: _____ Reviewer: _____

INTRODUCTION

It is our Company policy that each Team member meets with a Senior Manager or Director to review the performance levels they have delivered against the expectation from the Company that was specified in the Employment Contract and Schedule of Duties

Scheduled Reviews

- The first of the scheduled reviews is just prior to the probationary period
- The next of the scheduled reviews is just prior to the end of the first year of employment
- Then scheduled reviews are due at the end of each 6 month period thereafter

Unscheduled Reviews / Performance Management

- There may be times throughout the employment whereby the delivery of performance is not to an acceptable standard and as part of the Performance Management process, more regular reviews are scheduled
- Unscheduled reviews are generally the result of a lack of performance, poor punctuality, lack of attendance, unwillingness to embrace Company values, systems, policies or procedures; or issues surrounding the Employee's attitude towards work, Clients or other Staff

PERFORMANCE REVIEW PROCESS

During the review, the Employee will be provided ample opportunity to provide feedback to Management of their concerns. Employee concerns / feedback may include discussion around:

The Employees satisfaction with the role, Company & environment:

- Training – Internal & External
- Systems, Policies & Procedures
- Resources, equipment, environment
- Interaction with colleagues – issues & concerns
- Reassessing performance indicators
- Employees Goals – short term, medium & long term goals

Management will also provide feedback and share any concerns with the Employee around:

- Their attendance, punctuality, and hours
- Their interaction and impact with colleagues
- Their interaction and impact with other stakeholders – Clients, Renters, Suppliers etc
- Their grasp, understanding and ability to deliver an acceptable level of performance as set against the schedule of duties
- The willingness to embrace the Company's values, systems, policies & procedures
- The ability to set targets (goals) and whether or not these have been achieved
- Their ability to manage their workload and meet performance requirements

The summary of this performance review is to ensure that you have a structured opportunity to reflect on your work. It is an opportunity to receive and discuss feedback on your performance and is intended to be a fair representation of the views of both the Employee and the Employer

PERFORMANCE REVIEWS ARE PRIVATE & CONFIDENTIAL

The information discussed within the review is to remain confidential. Any breach of the privacy of the attendees, particularly surrounding specific points of discussion could lead to Performance Management actions, a reprimand or in the most serious cases of breach it may lead to termination of employment

HOW THE REVIEW WILL BE CONDUCTED

- Performance reviews will take place during work hours and scheduled at a mutually convenient time that suits both parties
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General Questions (open discussion)

1./ Do you have a written Schedule of Duties? And if so when was the last time you referred back to the Schedule to reconfirm that you are performing all the tasks that have been set out for the role?

2./ Are there any areas / points in your original Employment Contract, or Schedule of Duties that you would like to discuss to seek further clarification on the Company's expectations?

Pre-review Questions

3./ In general terms - Can you please state your understanding of your main duties & responsibilities, and provide an overview on how well you feel you are performing in the role?

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4./ What have been 3 of your major achievements (professional achievements) since your last review, or within the last 6 months?

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5./ Can you share some points that you like about working with this Company? Similarly can you share what you dislike and can you offer any suggestions to resolve the issues?

<i>Likes</i>	<i>Dislikes</i>
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6./ What elements of your job interest you the most, and which elements you like the least?

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7./ Do you believe any action could be taken to improve your performance?

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8./ What are 3 things that the Company can do to improve your performance & continue your professional development?

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ACTION PLAN & TAKE AWAY POINTS - Employee

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ACTION PLAN & TAKE AWAY POINTS - Employer / Reviewer / Company

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Employee's Signature _____ Date ____ / ____ / ____

Reviewer's Signature _____ Date ____ / ____ / ____

Director's Signature _____ Date ____ / ____ / ____

DISCUSSION POINT - Future Annual Leave Plans

DISCUSSION POINT - Changes to Job Description

DISCUSSION POINT - Employee's Comments

DISCUSSION POINT - Reviewer's Comments

9./ Does the Company provide adequate resources, equipment, tools, software and training to streamline your role? What else could we provide to make your role easier & more efficient?

Employee Professional Development

10./ What "internal training" would you benefit from in the next 3-6 months?

11./ If the Company was prepared to co-contribute up to \$500.00 in training & development, to match you dollar for dollar, would you be interested in participating in this program? And if so, what training?

COMMUNICATION		Score 5 = outstanding / 1 = poor					Comment / Feedback It is important that the Employee completes both the Employee rating and comments prior to the appraisal
45./ You select and use the most effective methods of communication to suit the situation	Employee:	1	2	3	4	5	Employee:
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Staff Performance Review_V7May2022

Page 14 of 17



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12./ Are there any "Policies" specific to your role, that you feel either need to be revamped, updated or where more focus on training is required?

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2.

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14./ Can you identify 3 Systems, Procedures or Policies that we don't currently have in place, that you feel would benefit you and your productivity?

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Career Development / Goals – Short Term / Medium Term & Long Term

Definition of a goal: *A goal is an idea of the future or desired result that a person or a group of people envision, plan and commit to achieve. People endeavour to reach goals within a finite time by setting deadlines*

15./ Short Term Goals - <i>Identify 3 specific goals that you aim to achieve in the next 90 days, and explain how the Company is able to assist you to achieve these goals</i>	
90 Day Goals:	Expected Due Date:
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16./ Medium Term Goals - <i>Identify 3 specific goals that you aim to achieve in the next 6-12 months, and explain how the Company is able to assist you to achieve these goals</i>	
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17./ Long Term Goals - <i>Identify 3 specific goals that you aim to achieve in the next 2-5 years, and explain how the Company is able to assist you to achieve these goals</i>	
2-5 Year Goals:	Expected Due Date:
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Two Way Feedback

18./ What could you or your Supervisor / Manager do differently that could further facilitate you achieving your work objectives? Are there any other work related issues that you would like to raise about your interaction with Management?

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19./ In your previous employment, were there any systems, procedures, ideas, concepts that you can take from that experience that you feel we may benefit from?

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PROFESSIONALISM	Score					Comment / Feedback	
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34./ Takes a positive approach to conflict and is known as a problem solver	Employee:	1	2	3	4	5	Employee:
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33./ Willingness to work overtime and be available when required	Employee:	1	2	3	4	5	Employee:
	Manager:	1	2	3	4	5	
32./ Attendance and punctuality	Employee:	1	2	3	4	5	Employee:
	Manager:	1	2	3	4	5	

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20./ Do you have any plans to attend a conference, or conferences over the next 3-6-12 months? If so, which ones would they be and what do you estimate the total cost to be?

21./ If the Company was prepared to pay for either part of the costs, or the entire cost, what goals or targets (incentive program), in addition to your normal duties / goals do you propose to implement, to offset the expense

PERFORMANCE RATING

Poor	(1)	Performance is below the level that is expected of this position and is unacceptable
Needs Improvement	(2)	Does not consistently demonstrate an understanding of what the position requires
Meets Expectations	(3)	Consistently performs what the job requires and fulfils expectations
Exceeds Expectations	(4)	Exceeds the expectations of this position and level
Outstanding	(5)	Shows a performance at an exceptional level, far above what would be expected

This Performance Rating is used for the following pages

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TEAMWORK	Score					Comment / Feedback It is important that the Employee completes both the Employee rating and comments prior to the appraisal	
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Page 11 of 17

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24./ Follows up and resolves issues and prioritises work to meet the expectations of Clients	Employee: 1 2 3 4 5	Employee:
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23./ Demonstrates proficiency in job role, so that the Team and the Clients can rely on advice given	Employee: 1 2 3 4 5	Employee:
	Manager: 1 2 3 4 5	Manager:
22./ Level of job knowledge and resourcefulness in carrying out key responsibilities	Employee: 1 2 3 4 5	Employee:
	Manager: 1 2 3 4 5	Manager:

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Staff Performance Review_V7May2022

Page 10 of 17

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Employee's Signature _____ Date ____ / ____ / ____

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Director's Signature _____ Date ____ / ____ / ____



DISCUSSION POINT - Future Annual Leave Plans

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Staff Performance Review_V7May2022

Page 15 of 17



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Page 11 of 17

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Staff Performance Review_V7May2022

Page 10 of 17