

Annual Staff Review Part A - to be filled in by employee before review

Employee: _____ Interview date: _____

A structured approach to staff evaluation and development is a useful management tool. For the employee it provides the opportunity for feedback on performance; for both management and the employee it is a tool for staff development. This evaluation and development procedure ensures that there is an annual formal component. However this does not replace continuous communication between supervisors and employees. Please bring completed form to the review.

1. What work achievements of the last 12 months would you like to highlight?

2. Job Satisfaction rating

Low					Medium					High
X	X	X	X	X	X	X	X	X	X	X

If low job satisfaction has been indicated, comment on how you think this could be improved.

3. Are there any recurring types of problems which prevent you from carrying out duties and responsibilities efficiently and effectively?

4. Are there any problems in the organisational structure which relate to your position and how it interrelates with other positions/sections?

5. Can you make any suggestions which would assist in overcoming the problems you have identified in the above questions?

6. What are your well developed skills, and your under-developed skills?

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7. Read through your action plan from the previous review; which actions have been achieved & which have not been completed (include reasons)?

Attach another page if you need to

8. Read through your Staff Development Plan Performance Objectives set at the previous review; which objectives have been achieved & which have not been completed (include reasons)?

The Victorian Local Authorities Interim Award 1991 states that progression of a staff member from one level to the next within a band shall not be automatic but shall be dependant upon the achievement of all of the following:

- (a) The acquisition and satisfactory utilisation of new or enhance skills if required by the employer and as is determined in accordance with staff Development Scheme Clause;
- (b) The meeting of performance objectives as determined in accordance with the Staff Development Scheme;
- (c) Satisfactory service over the preceding 12 months.

9. Do you believe you should be advanced to the next level in your band? If so, please list why.

**Annual Staff Review Part B
Questionnaire For Employee's Supervisor**

Employee _____

Interview date _____

Supervisor: _____

- 1. Please list the work achievements of the employee over the last 12 months. Include any relevant details.**

- 2. Please comment on the general performance of the employee over the last 12 months.**

- 3. Please list those skills of the employee you consider well developed. How could these be further enhanced?**

4. Please list those skills of the employee you consider under developed. How could these be improved?

5. Has the employee satisfactorily fulfilled the measurable outcomes/ training requirements of the Position Description and Action Plan to be completed for you and/or in partnership with you?

6. If applicable please comment on the quarterly progress of the employee in the completion of measurable outcomes and action plan items.

7. Other comments

Annual Staff Review Part C – to be filled in during review by supervisor

Employee _____ Review due: _____ (Note see question 6 below)

Interview Date _____

Position title: _____ Present Band: _____ Level: _____

1. **Discuss the Part A information brought by the employee to the review. Compare notes with the responses in the Questionnaire for supervisors (part B) List in the Action Plan any actions that are agreed need to be taken.**
 - **Together review last year's Action Plan. What percent of the actions were achieved? _____%.**
(transfer relevant actions into the current year's Action Plan)
 - **Together review the achievement of performance objectives set in the employees Staff Development Plan for last year. What proportion were achieved satisfactorily? _____%.**
2. **Does the Employee currently have an agreed, signed Position Description?**
_____ (If not this must be arranged)
3. **Are any changes needed to the Position Description?** _____
4. **Develop agreed performance objectives for the Staff Development Plan for the coming year together, based in part on the previous year. Performance objectives should be easily measurable targets and should set largely within the power of the individual to achieve, although some should be challenging. Satisfactory performance does not mean achievement of all objectives. Achievement of all objectives would be outstanding.**
5. **Do you or the employee see the need for additional training in order to meet the performance objectives in the Staff Development Plan for the coming year? If so list these in the Action Plan.**
6. **Has the employee taken any leave without pay, or paid leave longer than 3 months since their last review? _____ If so the date review due and date any increment becomes payable should be extended by the duration of the leave without pay or the excess over 3 months of paid leave.**

Checklist:

- Signed Position Description on file.
- Staff Development Plan Performance Objectives agreed and signed by both and dated and attached.
- Action Plan signed by both parties and dated and attached.

Annual Review Part C (continued)

Supervisor's summary and recommendation:

Performance *has/has not* been satisfactory.
I *do/do not* recommend progression within the band.

Supervisor's signature: _____ Dated: _____

Employee's comments:

Employee's signature: _____ Dated: _____

(If the employee wishes to lodge an appeal against the evaluation or the process of the review the Grievance procedure should be used)

Executive Officer's decision re: progression

(The appropriate executive officer is required to satisfy themselves that the interview process has been properly conducted and recorded and note for implementation staff development and action plans agreed by the supervisor and employee)

Approval is/is not given for progression to level ___ within band ___

Signed: _____ Dated: _____

Paymaster informed on date: _____ Next Annual Review due: _____

Annual Staff Review Part E:

MEMO

TO: Paymaster

FROM: Manager

RE: Progression of Staff Member

As a result of a recent Annual Staff Review please note that as of

...../ /200... I have approved the progression of

..... from band level to level

Please ensure the resultant pay changes are implemented effective from

.../.../200...

Thankyou

Manager.

**Cc: Employee
Supervisor**