

Performance Appraisal Policy

Objective/Intent

This policy is designed to ensure that employee performance is appraised fairly and justly by giving feedback on how well his or her activities and output meet the goals of the Diocese.

Background

The Diocese recognises that employees are a key resource and important to the success of the organisation. It is important that all employees are actively involved in giving and receiving feedback and planning their ongoing development and continual improvement in performance.

In the past the appraisal of employee performance was relatively unstructured and informal. Formal performance appraisal systems or plans did not appear to be universally implemented nor followed. Often performance appraisal occurred in response to performance problems.

These factors have necessitated a review of the current practices and establishment of this policy.

Policy

It is Diocesan policy to appraise the performance of employees in writing at least once a year. Performance appraisals may be held more often when necessary to address performance issues.

The review of each employee's performance is undertaken in accordance with the attached performance management and appraisal plan.

Principles and Objectives of Performance Management

The employees of the Diocese are recognised as its key resource. It is important that all employees are actively involved in developing the activities and outputs relative to their role that will achieve the goals of the Diocese. This planning process includes planning the ongoing development and continual improvement of each employee to meet the needs of the individual and that of the Diocese.

Performance management involves planning to achieve the goals of the Diocese. Performance appraisal involves measuring, evaluating and managing work and work-related outcomes, and ongoing acquisition and development of skills. Performance management and appraisal benefits both the Diocese and its employee. The performance management appraisal process ensures all employees are working in alignment with the directions and goals of the Diocese, and provides input that can be used to inform a range of human resource management activities such as the provision of relevant training and development opportunities.

What is performance management and appraisal?

Performance management is the ongoing, formal and informal process whereby managers and employees communicate to

- Ensure the employee understands the goals of the Diocese as a whole, and those of their specific area of operation;
- Set the employees own work goals, and ensure they fit within and are part of the broader Diocesan goals;
- Identify the employees development and career goals and how these might be pursued through developmental strategies;

Performance Appraisal is the ongoing, formal and informal process whereby managers and employees communicate to

- Assess how the employee has performed against the goals previously set and ensures the employee has enough fair and just feedback to understand his/her performance, celebrate his/her achievements, and maintain or improve performance in the future.
- Identify the employee's development and career goals and how these might be pursued through developmental strategies.

Informal performance management occurs regularly, as employees and managers discuss, plan and carry out work, evaluate the results, discuss ways to improve and set in place improvement and development strategies.

Formal performance management and appraisal usually operates on a six monthly basis so that the key steps are regularly carried out.

The Performance Management Appraisal Plan

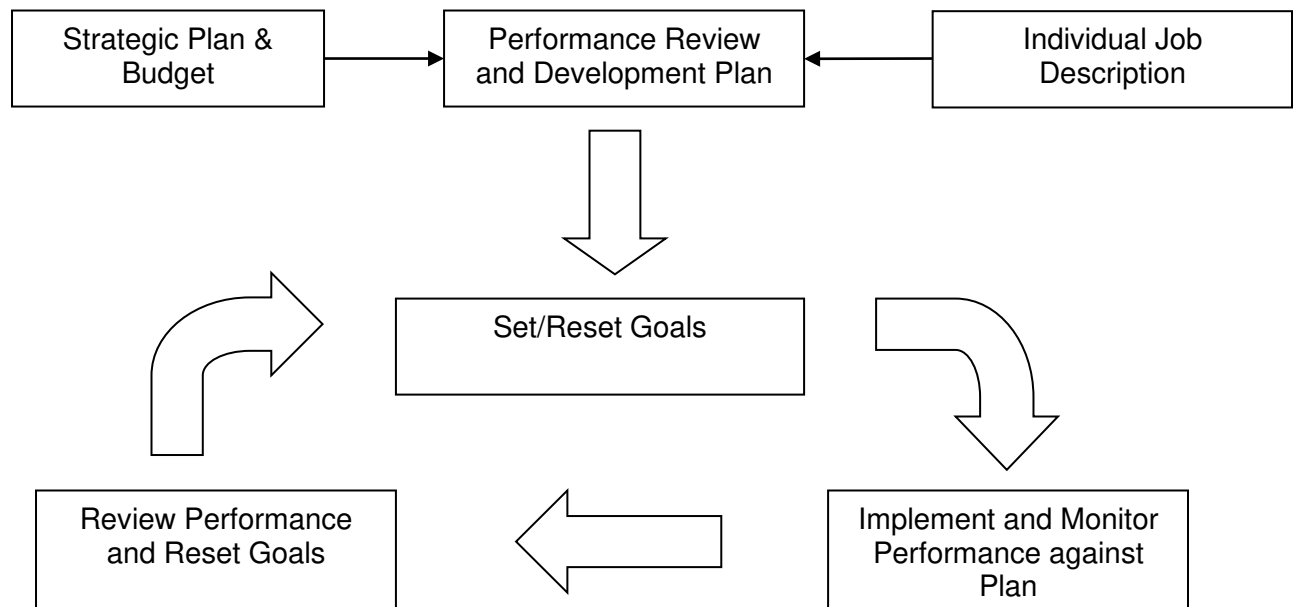
The formal review appraisal of each employee's performance is usually undertaken at least every year in June/July. The diagram below outlines the formal performance management appraisal process.

Performance Management Appraisal benefits the individual employee and the Diocese and provides an opportunity for:

1. role clarity;
2. discussing work related problems and developing solutions;
3. formally reviewing appraising performance and achievement of agreed goals and objectives;
4. two way face to face feedback;
5. linking individual performance to broader strategic plans and key objectives;
6. discussing goals and objectives and career development;
7. recognition of good performance and achievements; and
8. identifying training and development needs.

The Performance Management Process

The following flow diagram illustrates the performance management process:



The plan covers the forthcoming year and is prepared by the employee and then discussed with their manager. The manager will then approve the plan for the coming year.

Role of the Manager and the Employee

The performance management planning process should be undertaken as a partnership between the employee and the manager with both taking active roles deriving benefits from the process.

The following provides some guidance to managers and employee on their roles in undertaking the performance management plan.

Prior to the performance management meeting the employee should;

1. Be aware of when performance will be reviewed.
2. Review business plans, budgets, job description and the last performance management review.
3. Consider performance against the last performance management review
4. Consider future performance goals
5. Consider any other issues to be discussed at the performance management review.
6. Document any adjustments required to the agreed outcomes

Suggestions for planning the appraisal.

- Reviewing, discussing, and confirming understanding of the essential functions listed on the job description, annual goals and standards of work performance.
- Recognising strengths and achievements.
- Confirming previously identified functional areas needing improvement and establishing agreement about how improvement is to be accomplished.
- Identifying areas in which education, training, or other development opportunities are needed and a strategy for developing skills, knowledge or abilities.

At the performance management review the manager and employee should;

1. Communicate in a free, open and honest manner any issues to be discussed. Communication should be constructive and non offensive with a view to positive outcomes.
2. Review performance progress against the last performance management review
3. Reset performance goals and establish new performance goals for the coming year including measures, actions, resources and timelines
4. Discuss future training and development needs for both the employee and the organisation.
5. Document the performance management review using the performance management review form.

After the performance management review the manager and employee should;

1. Follow up on any outstanding issues that arose from the result of the performance management review.
2. The manager should provide to the employee a copy of the performance management review including the agreed outcomes and ensure any required action is taken.

Conclusion

The performance management plan for the Diocese is the opportunity to confidentially discuss areas of concern and raise issues in an open, honest and constructive manner. Employees should not feel intimidated by the process, but view it as an opportunity to gain feedback on their performance in a non threatening manner. Any issues of performance should be discussed as and when they occur. Regular feedback during the period is necessary. Employees should also feel free to provide feedback to their manager on the manner in which they are being managed.