Work-in-progress Feedback

These guidelines are intended as a work-in-progress and will continue to be informed by feedback from managers and staff members. Ideas about and suggestions for improvement of the document can be forwarded using Appendix 6 of this current version.

Additional Copies

Additional copies can be purchased from the DETE Human Resources directorate, telephone (08) 8226 1352, facsimile (08) 8410 3912. This document is also available for downloading from the Web site at <http://www.nexus.edu.au/groups/hr/performance.htm>.
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Introduction

The *Performance management policy* has been revised to reflect the changed composition of the Department of Education, Training and Employment (DETE). These guidelines support the implementation of the amended policy in schools, children's services, Technical and Further Education (TAFE) institutes, support service centres, district offices, state office units and services of the department.

In many worksites, performance management is accepted practice and the implementation of the new policy will simply involve a review and reinvigoration of processes.

The key elements of effective performance management include:
♦ a clear role or duty statement or job and person specification
♦ induction
♦ performance plan
♦ personal development plan
♦ recognition
♦ feedback and review
♦ grievance procedures
♦ addressing underperformance.

Owing to the diverse nature of the work of the different sectors of the department it has been necessary to produce broad guidelines with the intention that local procedures and sector specific models will be customised to local need.

In an attempt to be inclusive, it has been necessary to use general terms such as ‘staff member’, ‘manager’ and ‘worksite’ to reflect broad relationships and roles.

The guidelines do not describe in detail how to carry out various performance management processes.

Managers can develop their skills further through existing training and development programs such as those delivered by the South Australian Centre for Leaders in Education, the Training and Development Unit, Performance Management project officers and institutes of TAFE.

In addition, specific models, training packages and coordinated training strategies support the needs of schools, children’s services, TAFE institutes, district services and directorates. In this way, the department supports consistent, yet localised, performance management practices.
Managers and staff in DETE have engaged in performance management since the introduction of the *Performance management policy* in 1994. Review and release of the revised *Performance management policy* gives all managers and staff the opportunity to revisit their performance management processes and practices.

The department’s policy provides an overarching, mandated performance management context beneath which the performance management guidelines sit. These guidelines are a set of tools to which managers and staff refer when implementing performance management policy.

The guidelines are intended for all managers and staff in the department, including:
- teachers
- lecturers
- principals
- directors
- school services officers
- government services employees
- early childhood workers
- Aboriginal education workers
- Public Sector Management Act employees
- educational managers
- assistant lecturers
- hourly paid instructors
- printers
- trade persons
- drivers
- stores employees
- metal trades employees
- TAFE child care coordinators
- TAFE child care workers
- family day care workers.
Performance Management — A Mutual Obligation and a Two-way Process

What is Performance Management?

Performance management is a process by which staff members are able to clarify work objectives and learning is promoted. Skills are developed in order to contribute to the broader goals of the organisation.

Through successful performance management:
♦ contributions are valued and recognised
♦ employees are enabled to manage change in their work
♦ quality feedback focuses on continuous improvement
♦ professional and personal development are supported and extended.

The aim is to create a work environment which enables and supports employees.

Performance management of staff is part of the core business of managers. It is important therefore that managers commit time to implement performance management processes. Although managers have overall responsibility for performance management, sometimes it is necessary to delegate this responsibility to other line managers. It is important that managers and staff members understand the performance management relationships that have been established for a worksite. Managers must ensure that all staff receive regular feedback and performance recognition.

Mutual obligation is a key component of performance management. Managers are obliged to ensure that performance management processes are in place and operating effectively. Staff members are obliged to be involved in performance management processes that enable them to be effective in their work. The process to be adopted should be agreed by both parties. Staff members have a right to expect that appropriate performance management processes are provided for their development.

A Two-way Process

Quality performance management is a two-way process where:
♦ staff members work together with the organisation to identify goals for improvement
♦ professional and personal needs and organisational needs are jointly taken into account
♦ participants focus not only on the goals for improvement but also on improving the communication channels and the performance management process itself.
Performance Management — A Mutual Obligation and a Two-way Process

Through explicit processes, negotiation and mutual agreement, the department’s goals and objectives are more effectively met, worksite core business and priorities are reinforced and more effectively achieved, and staff members are enabled and involved.

Individual staff members develop skills and knowledge in identified areas. They are supported in planning for personal and career aspirations.

Managers support and extend staff members by working with them to consider feedback on performance. In turn, staff members support and extend managers to better manage the process.

Performance management processes are most successful where both staff and managers are involved actively.

Effectively managing underperformance is crucial to maintaining performance standards. The manner in which leaders manage underperformance is observed closely by all staff members and affects their attitudes and perceptions of the worksite. It is important, therefore, for the manager to manage underperformance firmly, confidentially and kindly.

Performance Management in Teams

Current organisational thinking acknowledges the effectiveness of teams in achieving quality and success. Many staff members appreciate the opportunity to work collaboratively and report increased job satisfaction and development due to the diverse perspectives gained from working in teams.

Shared responsibility for the work unit’s performance has the potential to support and extend individuals. It works on the premise that no individual success occurs unless the unit or worksite as a whole succeeds. Team approaches require considerable time spent in the establishment of ground rules and establishing trust between group members.

The challenge is for the team to progress past group affirmation, recognition and support and to develop the challenging climate of performance improvement to extend the team’s achievement.

There are aspects of the performance management process that can be managed in existing working and learning teams. However, the individual staff member should still have access to quality feedback on individual performance.

Some suggestions for ways to incorporate performance management into teams are the following:

♦ Team objectives and indicators of success are collaboratively developed. Individual staff members commit to their roles and share objectives and indicators of success with the team and/or line manager.

♦ The team negotiates and conducts some of the data collection processes and shares findings with the team and/or line manager.
Performance Management — A Mutual Obligation and a Two-way Process

♦ The team meets to discuss progress on objectives, to identify problems and barriers and to provide feedback to each other. This is done in the spirit of team improvement and according to a set of mutually agreed rules of conduct.

Individual team members also meet with the line manager or team leader to review individual progress including a review of their contribution to the team.
Key skills in the Performance Management Cycle:
- observing
- listening
- giving feedback
- receiving feedback
- self-evaluation
- critical reflection
- action research
- data and information management
- performance assessment
- writing statements about performance.

Courses which develop these skills include:

- **Developing Professionals**
  SA Centre for Leaders in Education, Hindmarsh for existing and aspiring leaders in schools and children’s services.

- **The ASO Manager’s Toolkit**
  Training and Development Unit, Hindmarsh, for ASO managers in departmental district and state offices.

- **Performance Management Skills** and **Writing Statements about Performance** delivered by the Performance Management project officers. Watch Xpress for details or call Employee Services on 8226 1352.

- **TAFE institutes** offer a variety of training about performance management. Contact your nearest institute to discuss your needs.

The Performance Management Cycle incorporates the elements of:
- Performance Planning
- Personal Development Plan
- Gathering Information
- Feedback and Review

**Performance Planning**

**Personal Development Plan**

**Feedback and Review**

**Gathering Information**

Important considerations are regular reviews and flexibility.

Flexibility is needed to take into account:
- tenure of position
- experience of staff member
- identified professional needs and capacities.

Aspects of the cycle may be managed in teams or with individuals.

**How might the cycle be managed?**

- Planning Meeting
- Feedback and Review Meetings
- Annual Review
Key Elements of a Performance Management Framework

**Role or Duty Statement**

**Job and Person Specification**

It is expected that every staff member will have an explicit and up-to-date role or duty statement or job and person specification.

With the exception of teachers in schools, work expectations for all staff are in the form of job and person specifications which describe the outcomes required of the position. They are a formal outline of the role describing:
- the place of the position within the worksite
- its function
- the collection of duties, responsibilities and results expected
- working and reporting relationships.

While there are no job and person specifications for teachers in schools, there is a document derived from the Education Act and its subordinate regulations which defines the role of a teacher in the schooling sector. It is entitled *The roles and responsibilities of teachers* (EDSA 1992).

As a part of performance management processes the role or duty statement and job and person specification serve the following functions:
- to assist with induction and training
- to provide a basis for review and discussion of a staff member’s performance
- to provide base information when considering reclassification or career goals.

Job and person specifications are usually written or updated when a position is being created or refilled due to a vacancy.

For all PSM Act staff and seconded teachers, job and person specifications are written normally by managers in conjunction with the directorate Human Resources consultant. The job and person specification is forwarded to the Classification Committee for classification advice and then to the delegated officer for endorsement.

In schools, this is done in consultation with the Personnel Advisory Committee (PAC) prior to advertising the position.

Once a staff member is in a position, it is important that the job and person specification is reviewed regularly as part of the performance management process to determine whether it still accurately describes the position and reflects the worksite priorities and timelines. This can be done collaboratively between the manager and the staff member and will be informed by ongoing feedback and review processes.
Key Elements of a Performance Management Framework

Role or Duty Statement
Job and Person Specification

It will be necessary for managers to develop job and person specifications for some employees in existing or new positions. It is useful to start with generic job and person specifications but these should be adapted to reflect the local context and needs of the worksite. Relevant resources are listed in the left-hand column to assist with this process. Care must be taken to:

♦ describe positions in outcome terms
♦ ensure that staff consultation is an integral part of the job design process
♦ avoid discriminatory and unnecessary requirements and so limit the pool of applicants
♦ ensure that requirements and levels of responsibility are commensurate with the level of remuneration
♦ seek appropriate authorisation.

Job and person specification preparation must be in line with equal opportunity principles as outlined in the handbook Merit selection principles, policy and procedures (DECS 1997).

A document which provides a framework for the teaching profession is Teachers’ work (EDSA 1992). It is one of the reference points which identifies the core areas or dimensions of the work of the profession. Copies of Teachers’ work are available in all schools and preschools, and from Human Resources. Other reference points which provide frameworks for the work of the individual practitioner include the generic and school-based role statements for teachers.

For principals, Educational leadership — the work of leaders in our schools (DECS 1994) provides an additional resource for addressing issues specific to these positions.

For advanced skills teachers (ASTs) or those aspiring to be ASTs in a school setting, the AST criteria may be more useful for setting development objectives.

The criteria for advanced skills lecturers (ASLs) are outlined in a ‘guidelines’ folder held by Human Resource Units within institutes. The role of principal lecturer is described in the TAFE Act Interim Award 1992 and should be read with the Enterprise Bargaining Agreement of 1996.

Classifications Standards (Office for the Commissioner for Public Employment 1996) is used as a guideline for producing job and person specifications for PSM Act employees. The whats, whys and hows of outcome job specifications (Department of Personnel and Industrial Relations 1990) provides additional information for writing job and person specifications.
Key Elements of a Performance Management Framework

Induction

Effective induction processes explain expectations of employees, particularly where work locations and/or roles have changed.

Effective induction:
- informs new staff members about their role, working relationships and expected outcomes
- provides support for a smooth transition into the new workplace and role
- clarifies expectations, processes and practices thereby decreasing the anxiety which accompanies uncertainty
- increases the capacity to respond to challenge and increases employee health and well-being
- enables the staff member to identify and undertake new learning
- supports the establishment of working relationships with work colleagues and the manager.

Managers have a responsibility to ensure staff members new to a worksite or role participate in an induction program.

An effective induction program is built around the particular context of the worksite. It involves a multifaceted approach which will usually incorporate the following activities:
- orientation tour of the workplace
- meetings with the line manager which allow careful explanation of work expectations and responsibilities
- reference material such as a booklet or checklist which summarises the important information, policies, structures and procedures relevant to the worksite
- identification of key people to support the employee through the transition period
- introductions to all staff members, explanations of their roles and responsibilities and opportunities to socialise and get to know them
- an audit of training needs and provision of access to relevant training opportunities
- frequent meetings with the line manager to review the progress of the employee through the transition period
- an outline of occupational health, safety and welfare matters
- an introduction to worksite performance management processes
- an outline of grievance procedures.

Relevant resources which support the design of an induction program, and induction programs available to some employee groups are listed in the left-hand column.
Key Elements of a Performance Management Framework

Planning for performance and personal development is a key element in a performance management framework. Many planning formats will incorporate the two elements into one planning document. Examples of some tools for planning are included in the left-hand column on the next page and are best customised to suit individual and worksite needs. The schema below shows the relationship between the two elements.

**Performance Plan**

*Organisational and work unit goals are partly determined by other information such as a Partnerships 21 plan, annual operational plan or statement of purpose. The performance plan establishes the link between organisational or work unit goals and agreed indicators of individual performance.*

**Key questions to assist with planning**

♦ For what part of the worksite plan or team/unit plan am I accountable?
♦ What will I do to implement the plan?
♦ How will I work with other members of the team?
♦ What action will I take to achieve my performance objectives?
♦ What criteria will be used to measure my success?

**Personal Development Plan**

*The personal development plan provides an outline of action to be taken by the individual to develop skills and knowledge to meet the performance plan objectives. It also incorporates individual career goals.*

**Key questions to assist with planning**

♦ Do I have the skills and knowledge to do the job that is described for me right now?
♦ Are there changes coming for which I need to prepare?
♦ Where do I want my career to be in the future?
♦ What might the organisation do to support me?
♦ What are the agreed processes for planning that I need to utilise?
Key Elements of a Performance Management Framework

Performance Plan

A staff member and manager meet at the beginning of the Performance Management Cycle to agree on the focus for the staff member’s work during the year.

Starting points will be:
♦ the role or duty statement, job description or job and person specification
♦ the annual worksite priorities
♦ previous performance statements, plans and performance assessments if they exist.

Specific objectives are agreed for the coming cycle, which will usually be for a year. Objectives are best when they are:
♦ clear and concise about what is to be achieved
♦ measurable
♦ challenging — neither too comfortable nor unrealistic
♦ flexible, as they may need amending.

Where objectives span more than a year it is helpful to identify markers to assess progress at the annual review. Objectives are written in outcome terms.

There can be no hard and fast rules about how many objectives should be set. However, as a broad guide, six or more objectives might suggest that activities rather than objectives are being identified. Fewer than three might make it difficult to include appropriate objectives to cover worksite priorities.

The manager works with the staff member to ensure that he or she:
♦ understands what his or her objectives involve
♦ is in a position to achieve the outcomes
♦ understands when and how he or she will be reviewed
♦ has objectives which relate to the objectives in the worksite plan.

Where it is likely that factors outside the staff member’s control may affect his or her capacity to address outcomes, this should be discussed with the staff member at the outset.

Once objectives are agreed, performance indicators are established. These indicators define the measures of success in achieving the outcomes.

When developed collaboratively, indicators are more likely to:
♦ be appropriate for the requirement of the job
♦ reflect the realities of the work context and conditions
♦ be understood by both staff member and manager
♦ be accepted by both staff member and manager.

Indicators should be written in clear language describing the specific behaviour, actions and results required for work performance to meet expectations.
Key Elements of a Performance Management Framework

When writing indicators for success it is important to:
♦ use specific terms which describe the verifiable features of the performance
♦ describe performance expectations in terms such as student learning outcomes, timeliness, cost, quality, quantity, customer satisfaction, independent initiative, or any other relevant verifiable measure
♦ specify the acceptable margin for error, where appropriate
♦ refer to any specific conditions under which the performance is expected to be accomplished (e.g., assuming all information is received on time).
Key Elements of a Performance Management Framework

**Personal Development Plan**

The personal development plan is that part of the planning that relates directly to the staff member’s personal development needs. The personal development plan may be incorporated as a part of an overall performance plan as is the usual practice in schools and children’s services or may be a separate tool to document the performance-related personal development objective.

Skill areas may be identified by the staff member or the manager and may arise from performance reviews, changed work conditions, or predicted future needs and interests.

The personal development plan’s overall purpose is to support and extend the growth and development of staff members in order to build motivation, commitment and enhance job satisfaction. In this way the individual, worksite or unit and the department as a whole, benefit from new skills, knowledge and experience. This development also ensures that staff skills continue to match the job requirements.

The personal development plan may be used to describe:
- plans for performance which are related to the position
- plans for career development
- plans for preparing for new functions needed in the near future
- training and development activities to be undertaken to enhance skills and knowledge
- expected outcomes of the above actions.

Personal development plans should be considered with the needs of the department and the needs of the staff member in mind.
Key Elements of a Performance Management Framework

Recognition

An important function of the feedback and review elements of the Performance Management Cycle is to provide recognition which explicitly acknowledges achievements.

Recognition is fundamental to maintaining positive motivation and job satisfaction. Recognition supports staff to identify behaviour which contributes positively to the achievement of worksite goals.

Recognition may be given for individual or team achievements. It is valued when it is seen as genuine, appropriately timed, and the giver viewed as credible and informed.

Meetings will provide a personal forum for managers to recognise the employee’s successes and achievements. They will also become a source of information for managers about staff achievements and so managers may want to acknowledge successes outside these meetings where appropriate.

When recognising performance, sensitive balance needs to be achieved between personal preferences, cultural factors, fairness and consistency of approach.

Recognition may take the form of personal notes and comments that affirm observed successes, acknowledgment in meetings and celebratory events such as a shared lunch.

More formal recognition may take the form of:

- written reports on performance
- encouragement and support for applications for promotion positions
- published acknowledgment though newsletters, professional journals and Xpress
- public celebrations of achievement
- special roles and projects being created which acknowledge the skills and expertise of an individual or team and reward initiatives by providing time and resources for their continued achievement
- awards and ceremonies.
Key Elements of a Performance Management Framework

**Feedback and Review**

Feedback and Review enable staff and managers to acknowledge good practice and identify areas for improvement, learning and development opportunities.

Staff members have a right to structured verbal and written feedback regarding their performance against agreed outcomes. Feedback will be given at least annually. If staff members are concerned about their performance then they can initiate a meeting with their manager.

Managers have a responsibility to work with staff to provide fair and accurate reviews and performance assessments. These should be linked to the explicit expectations outlined in the performance plan and based on identified information and data collection from a range of sources. It is important that the data collection processes are mutually agreed.

A performance review may also be requested by staff to verify achievement or identify focus development areas in preparation for a formal report or performance assessment.

**Gathering Information on Performance**

So that feedback is based on verifiable, work-related behaviour and results, it is necessary to agree on methods of gathering information about performance at the initial performance planning and ongoing review stages. The most appropriate methods need to be chosen to give the best information in answer to the question: How will success be measured?

The methods of gathering information about performance may be qualitative or quantitative and include:

- observation
- structured dialogue
- questionnaire
- student achievement data
- client data
- self-assessment
- peer assessment
- team assessment
- manager assessment
- program or project analysis
- product or outcome analysis
- feedback from external sources
- demonstrated evidence of achievements
- publications and public presentations
- media and anecdotal feedback.

Information may be gathered by the staff member, work colleagues, the manager or a combination of these.
Key Elements of a Performance Management Framework

Giving Feedback on Performance
As part of the Performance Management Cycle feedback is given in regular meetings. Both the staff member and manager prepare for these sessions by collecting and collating the agreed performance data and spending some time analysing and reviewing the data prior to the session.

Skilled listening and questioning are required to support and encourage staff members to reflect on and analyse their own performance.

Feedback given by the manager should be:
♦ descriptive and specific
♦ based on observations, results and verifiable data
♦ focused on behaviour
♦ appropriately timed and as close as possible to any agreed event (eg an observation)
♦ appropriate to the individual
♦ constructive.

When giving feedback it is important to:
♦ explore alternatives, not offer solutions
♦ build on the positive aspects of the employee’s work
♦ be sensitive to its reception and respect the preferences of the employee.

It is not appropriate to give feedback when:
♦ not enough is known about the circumstances
♦ it is not possible to follow up afterwards
♦ the feedback is about something the employee has no power to change
♦ the employee is dealing with a personal crisis (this needs to be managed according to the specific circumstances of the situation)
♦ the intention is to ‘get’ the employee
♦ the time and place are inappropriate.

The manager models ‘two-way’ performance management. These sessions may provide managers with feedback about how their work helps or hinders the staff member’s effectiveness.

At feedback and review meetings the staff member and the manager exchange performance-related information gathered throughout the Performance Management Cycle. At these meetings time is taken to consider:
♦ achievements
♦ training needs
♦ problems or issues
♦ progress towards the performance objectives and anticipated outcomes
♦ suggestions for improvements.

This enables the staff member and manager to refocus objectives.

A reflective report may be a useful tool for the staff member to reflect on achievements, analyse progress against the performance indicators and analyse results in preparation for performance reviews.
Key Elements of a Performance Management Framework

Staff members should receive a written summary of the outcomes of the feedback and review meeting. Feedback and review meetings are also used to prepare for a formal review of staff performance. Written summaries can be used for performance assessment for the purpose of:

- reclassification, transfer, increase in time
- practicum report, teacher registration, probation release, contract teacher report, verifications for placement, school choice, promotion to AST, fifth year AST reassessment
- referee statement, applications.

The annual review session is used to provide a formal summative report of the employee’s achievements against the agreed outcomes.

Confidentiality and Documentation

Crucial to successful feedback and review is adherence to confidentiality and thorough documentation practices.

In the performance management context, it is the responsibility of all staff members involved to maintain confidentiality. Documentation is jointly owned by employees and managers. Both parties should have signed copies of all documents. This should be maintained in a secure file. No consideration should be given to documents which are not shared. Information contained in the documents is to be used only for the purpose of performance management unless agreed by both parties.

Documentation practices should be consistent with the ‘Information Privacy Principles’, and should follow the principles of procedural fairness (p 5 in Grievance resolution policy for employees) and principles of good management.

In situations of conflict, managers sometimes keep a record of interactions with an employee (eg of conversations and incidents) unknown to that employee. In line with the ‘Information Privacy Principles’ any such records should be treated in the same manner as the performance management documentation and not be a secret from the employee (see appendices 4 and 5).

Information Privacy Principles

Excerpt from Circular No 12 Department Of Premier and Cabinet are included in the Administrative instructions and guidelines Section 1, p 216 paragraph 148 and are available on the Legal and Policy Framework disk.

Included in the appendices:

- General Disposal Schedule No 15
  10/11/98-10/11/03
- State Records Disposal Schedule 1418 for Teachers
- General Disposal Schedule No 15 for TAFE
  www.learnsa.net/rmp/info/GDS15Intro.htm
Key Elements of a Performance Management Framework

Grievance Procedures

All staff have a right as well as a responsibility to be involved in performance management processes that further organisational goals as well as personal goals.

If staff have concerns about the nature and manner in which performance management processes are conducted or that there is no access to performance management processes, it is necessary to address the concerns.

Concerns are addressed through grievance procedures consistent with department policy and procedures. According to the nature and seriousness of the grievance, a staff member may elect to deal with it in one or more of the following ways:

♦ a personal resolution
♦ an expression of concern, either verbally or in writing to the manager
♦ a formal grievance to the manager’s line manager
♦ contacting other agencies such as a union, the Equal Opportunity Commission, Employee Ombudsman or the Commonwealth Human Rights and Equal Opportunity Commission.

In most cases resolution of the grievance will be most appropriately handled at the local level, at least in the first instance.

The levels of grievance are explained in the Grievance resolution policy for employees (DETE 1998). This policy is supported by Grievance procedures for employees in children’s services and school sector and by the Complaint resolution policy and procedures (DETAFE 1997).
Key Elements of a Performance Management Framework

Addressing Underperformance

Both staff members and managers have a responsibility to actively address performance concerns as they arise.

Early detection of underperformance is desirable. Performance issues are most easily addressed and resolved when they are attended to in their early stages and will have progressively greater negative impact if they are left unaddressed.

Where performance concerns have been identified by the manager, staff members should be informed as soon as possible and be given the opportunity to improve performance. This may require additional support and the provision of appropriate training.

It is important to adopt a problem-solving approach to get to the core of the problem and find solutions. The manager and staff member should work together to define the issues. Proceedings and agreements need to be documented, signed and owned by both parties.

Part of the problem-solving approach is to define the problem, determine a clear, concrete and strategic goal for improvement and identify potential blocks to change.

Open and professional discussions enable the staff member and manager to:

- identify the concerns and articulate the desired goal(s) for improvement
- identify potential causes for underperformance
- identify appropriate support mechanisms
- plan a course of action with indicators of success
- review progress against the goals for improvement.

If the cause of underperformance is identified as unrelated to work it may be necessary to refer the staff member to an employee assistance program (EAP). The manager should not attempt to resolve personal difficulties but should encourage the staff member to seek outside professional help. Options for support may involve taking leave or flexible working arrangements while the person works through the issue.

Where interpersonal conflict with other employees is a cause of underperformance it may be necessary to:

- draw the employees’ attention to the Code of Conduct for public employees so that they are aware of their obligations when interacting with other staff
- employ conflict resolution or mediation strategies
- seek the assistance of a trained facilitator.
Where the work itself is the cause of underperformance it may be necessary to check:
- the level of induction received
- understanding of the tasks involved and the goals to be achieved
- the level of training in specialised tasks and processes
- that the work involves sufficient challenge
- the job design
- that job expectations are consistent with the job and person specification the group dynamics of the worksite.

**Strategies**
Appropriate strategies to address underperformance may involve all or some of the following.

Performance plans may have to be modified to more realistically reflect the performance skills and needs of staff.

**Professional development** strategies which may be considered by managers and employees include:
- coaching.
- mentoring
- work shadowing.

These may be particularly useful if the manager and staff member are located at different worksites.

**Training** may be necessary where it has been identified that the employee lacks the necessary knowledge or skill to carry out the requirements of the position. Steps in training include:
- clarifying expected outcomes and explaining individual outcomes in detail
- demonstrating or giving examples for achieving these
- identifying the existing skills or knowledge of the employee and the new skills or knowledge that need to be developed
- identifying the most appropriate mechanism for developing the skills or knowledge
- assisting the employee to perform tasks associated with the required outcomes
- monitoring and evaluating performance and giving regular feedback.

Identifying and providing opportunities for staff to participate in training programs is an important aspect of performance management.

Training may be assisted by the allocation of a ‘coach’ or ‘mentor’ to work with the employee.

**Redirection** may be sufficient for addressing underperformance if the staff member has the necessary skills but has received minimal induction, transferred from a different team or worksite or is unclear about the role. Redirection involves:
- clarification of the purposes, roles and expectations of the position including the broader responsibilities to the worksite
- identifying and documenting work priorities and objectives.
Key Elements of a Performance Management Framework

Addressing Underperformance

Where the staff member has expressed boredom or dissatisfaction with the job, negotiation of new responsibilities or opportunities, which may involve work on a new project or with a new team, may restore motivation.

Review dates and performance targets should be set during the joint action planning sessions. Once sufficient progress is made towards resolving the performance issue, development is recognised and the extra measures can end.

If, however, the staff member’s performance does not improve prior to the review dates and the person continues to fail to meet the required standards after a reasonable period of counselling and support, it will be necessary to progress to more formal procedures. Human Resources personnel should be consulted.
The following generic performance standards may be used as a framework for annual reporting and other accountability requirements. They form the basis of the self-assessment checklist included in this document under the heading 'Monitoring Performance Standards'.

**Policy**

- All staff are aware of, and have access to, a copy of the *Performance management policy* (DETE 2000).
- The worksite has negotiated performance management procedures.
- The agreed performance management procedures reflect the local context and the diversity of employee backgrounds.
- These procedures have been determined using the worksite’s agreed decision making processes.
- The procedures are published and have been distributed to all staff.

**Induction**

- All staff members new to the worksite participate in an induction program.
- All staff members whose roles change at their current worksite participate in an appropriate induction program.

**Roles or Duty Statements and Job and Person Specifications**

All staff members have either a clearly defined and documented role and duty statement or job and person specification which describes the outcomes required of their position.

**Performance Planning**

All staff members have clearly defined and documented performance objectives related to their roles and responsibilities and the worksite priorities for development.

**Personal Development Plan**

All staff members have identified and documented personal learning goals related to priorities for personal development.
Performance Standards

Feedback and Review

♦ All staff members meet regularly with their line managers to discuss issues related to performance, professional learning and personal growth.
♦ The worksite manager meets regularly with his or her line manager to discuss issues related to performance, professional learning and personal growth.
♦ All staff members are provided with constructive feedback on their performance.
♦ Documentation of these meetings and of the feedback is kept by both employee and line manager.
♦ Written feedback is provided at least annually to all staff.

Recognition

♦ Staff contributions are recognised and acknowledged during performance feedback and review meetings.
♦ Written reports and performance assessments (eg AST1 assessment, referee statement, teacher contract report, work report) reflect quality information and a quality process.
♦ The worksite has well understood, transparent and fair methods for recognising the achievements of all staff.

Grievance Procedures

All staff members are aware of grievance procedures should they have concerns relating to performance management processes.

Addressing Underperformance

♦ Teaching staff members are aware of the 'Managing Significant Underperformance' process.
♦ Non-teaching staff members are aware of existing disciplinary processes.
Monitoring Performance Standards

Through the annual reporting process, worksites will be asked to evaluate their performance management practices against the essential key elements of a Performance Management Framework. The following self-assessment checklist may be used by managers to assist with a review of current worksite performance management practice and inform planning for improvement.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Policy</strong></td>
<td>All staff members are aware of, and have access to, a copy of the Performance management policy (DETE 2000).</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>The worksite has negotiated performance management procedures.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>The agreed performance management procedures reflect the local context and the diversity of employee backgrounds.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>These procedures have been determined using the worksite's agreed decision making processes.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>The procedures are published and have been discussed and distributed to all staff.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Induction</strong></td>
<td>All staff members new to the worksite participate in an induction program.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>All staff members whose roles change at their current worksite participate in an appropriate induction program.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Roles or Duty Statements and Job and Person Specifications</strong></td>
<td>All staff members have either a clearly defined and documented role and duty statement or job and person specification which describes the outcomes required of their position.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Performance Planning</strong></td>
<td>All staff members have clearly defined and documented performance objectives related to their roles and responsibilities and the worksite priorities for development.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Personal Development Plan</strong></td>
<td>All staff members have identified and documented personal learning goals related to priorities for personal development.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Feedback and Review</strong></td>
<td>All staff members meet regularly with their line managers to discuss issues related to performance, professional learning and personal growth.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>The worksite manager meets regularly with his or her line manager to discuss issues related to performance, professional learning and personal growth.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>All staff members are provided with constructive feedback on their performance.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Documentation of these meetings and of the feedback is kept by both employee and line manager.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Written feedback is provided at least annually to all staff.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Recognition</strong></td>
<td>Staff contributions are recognised and acknowledged during performance feedback and review meetings.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Written reports and performance assessments (e.g. AST1 assessment, referee statement, teacher contract report, work report) reflect quality information and a quality process.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>The worksite has well understood, transparent and fair methods for recognising the achievements of all staff.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Grievance Procedures</strong></td>
<td>All staff members are aware of grievance procedures should they have concerns relating to performance management processes.</td>
<td>☐</td>
</tr>
<tr>
<td><strong>Addressing Underperformance</strong></td>
<td>Teaching staff members are aware of the ‘Managing Significant Underperformance’ process.</td>
<td>☐</td>
</tr>
<tr>
<td></td>
<td>Non-teaching staff members are aware of existing disciplinary processes.</td>
<td>☐</td>
</tr>
</tbody>
</table>
Appendices

Contents

Appendix 1: Generic Performance Plan Proforma
Appendix 2: Generic Performance Plan Review Proforma
Appendix 3: Generic Personal Development Plan Proforma
Appendix 4: Confidentiality and Documentation
Appendix 5: Information Privacy Principles, Freedom of Information Act and Implications for Documentation
Appendix 6: Feedback Sheet

Generic Proformas

The following generic proformas provide a reference point against which managers and employees can adjust existing performance plans and personal development plans. Alternatively, these proformas can form the basis of new performance and personal development plans in worksites where such proformas do not exist currently.

The proformas incorporate all factors crucial to effective performance planning and personal development planning.

♦ The generic Performance Plan proforma links staff members’ performance objectives with worksite priorities and strategic directions. It provides a structure within which staff members classify their specific areas of accountability, outline their performance objectives, identify the actions they will take to achieve their objectives and specify the criteria against which they will measure performance.

♦ The generic Performance Plan Review proforma facilitates reflection, and documents both the actions taken and the extent to which staff members achieve their objectives. It provides a specific opportunity for managers to acknowledge and recognise staff performance.

♦ The generic Personal Development Plan proforma links the role or duty statement or job and person specification with the staff member’s skills, experience and knowledge. It also prompts career planning and enables staff members to give feedback to managers.

It is expected that managers and staff will adapt proformas to suit the local context and individual needs. Space allocated to each aspect should be adjusted for more or less information and to make the form fit one or two pages as required.
# Appendix 1: Generic Performance Plan Proforma

<table>
<thead>
<tr>
<th>Name</th>
<th>…………………………………………………………………………</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Department strategic directions as they relate to this worksite</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Worksite strategic directions/priorities</strong></td>
</tr>
<tr>
<td></td>
<td>(Refer to statement of purpose, strategic plan/operational plan)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Aspects of the worksite strategic directions/priorities for which I am accountable</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>My performance objectives/outcomes (as they relate to the worksite)</strong></td>
</tr>
<tr>
<td></td>
<td>(eg decreasing the number of complaints about service by X%, using IT to increase work efficiency, complaints about incorrect salary payments are reduced by X%, increasing number of ASTs in school, increasing parent participation in my literary program, develop three-way interviews for X% of class, negotiate criteria for success with students for all subject areas)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Continued
## Appendix 1: Generic Performance Plan Proforma

<table>
<thead>
<tr>
<th>Name .................................................................................</th>
</tr>
</thead>
</table>

### Ways in which I will work with other members of the worksite/team to achieve my objectives/outcomes

<table>
<thead>
<tr>
<th>Actions I will take to achieve my objectives/outcomes</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>(eg review communication structures and processes in my team/classroom/community)</td>
<td></td>
</tr>
</tbody>
</table>

### Ways in which others can support me/resources available

### Criteria/performance indicators against which I will measure success
<table>
<thead>
<tr>
<th>Criteria/performance indicators against which I will measure success</th>
<th>Timeframes</th>
</tr>
</thead>
<tbody>
<tr>
<td>(eg reduced accident and injury reports in my unit, increased literacy levels)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff member’s signature..........................................................</th>
<th>Manager’s Signature..................................................</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date ..................................................................................</td>
<td>Date ........................................................................</td>
</tr>
</tbody>
</table>

Review date ..............................................
Appendix 2: Generic Performance Plan Review
Proforma

Name ………………………………………………………………………

Worksite strategic directions/priorities (results)

Aspects of the worksite/strategic directions/priorities for which I am accountable (results)

My performance objectives/outcomes (results)

Ways in which I have worked with other members of the worksite/team to achieve my objectives/outcomes

Actions I have taken to achieve my objectives/outcomes

Continued
# Appendix 2: Generic Performance Plan Review Proforma

<table>
<thead>
<tr>
<th>Name</th>
<th>Ways in which others have supported me</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My achievements measured against success criteria/performance indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Emerging issues</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manager’s feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff member’s signature</th>
<th>Manager’s signature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Review date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Appendix 3: Generic Personal Development Plan Proforma

<table>
<thead>
<tr>
<th>Name</th>
<th>…………………………………………………………………………</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essential skills, experience and knowledge required of the job</td>
<td>…………………………………………………………………………</td>
</tr>
<tr>
<td>Review of my current skills, experience and knowledge against essential skills, experience and knowledge</td>
<td>…………………………………………………………………………</td>
</tr>
<tr>
<td>Specific skills, experience and knowledge I will develop further</td>
<td>…………………………………………………………………………</td>
</tr>
<tr>
<td>Career goals</td>
<td>…………………………………………………………………………</td>
</tr>
<tr>
<td>Actions I will undertake to achieve these skills and career goals</td>
<td>…………………………………………………………………………</td>
</tr>
</tbody>
</table>

(eg work shadowing, skill building courses/training and development, committee involvement, professional associations)

| Timelines | ………………………………………………………………………… |

Continued
Appendix 3: Generic Personal Development Plan Proforma

<table>
<thead>
<tr>
<th>Name</th>
<th>………………………………………………………………………………</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ways in which my manager/the organisation/others can support me</td>
<td>(eg training and development, mentoring, coaching)</td>
</tr>
<tr>
<td>Feedback to my line manager about his/her performance as it relates to me</td>
<td>(focusing on observed behaviour or specific events)</td>
</tr>
<tr>
<td>My indicators of success</td>
<td></td>
</tr>
<tr>
<td>Manager’s feedback</td>
<td></td>
</tr>
</tbody>
</table>

Staff member’s signature……………………………………… Manager’s signature………………………………………

Date……………………………

Review date……………………………
Appendix 4: Confidentiality and Documentation

How should information be documented?

Guidelines are as follows:
♦ the purposes for collection of information and the use of the documentation should be clearly negotiated at the beginning of the performance management process
♦ any documentation should be shared and open with full knowledge of the staff member and the manager
♦ documented records of meetings belong to both staff member and manager and should be signed by both as a true and correct record of proceedings
♦ performance assessments such as work reports and referee statements are jointly owned by the manager and staff member
♦ there should be no surprises. Where a manager receives information which is critical of the staff member’s performance, it should be brought to the staff member’s attention at the earliest convenience
♦ files should be shared and open
♦ both the staff member and the manager should have access to or copies of files and they should be stored in a secure place.

What happens in the case of a handover to a new manager?

In accordance with the ‘Information Privacy Principles’ any information passed on should be accurate, complete and up-to-date.

The staff member should have full knowledge of the information forwarded to a new manager. It is desirable for the manager and staff member to negotiate the relevance of information to be handed on.

When making decisions about what to include, the following need to be considered:
♦ whether there are any continuing developmental issues about which the new manager needs information in order to fully support the staff member
♦ the disposal of information should be consistent with the State Records Disposal Schedule, i.e.
  — For teachers, records should be destroyed after two years after completed action unless involved in the Managing Significant Underperformance process
  — For all other employees, records relating to the performance of individual staff members should be destroyed one year after completed action.

What happens in the case of a complaint against a staff member?

When documenting a complaint made against a staff member it is essential for managers to adhere to the procedures as set down in the Administrative instructions and guidelines (AIGs) Section 2, page 25 paragraph 76, ‘Confidentiality’.
Paragraph 76 on confidentiality is quoted below.

When any written or oral complaint is received, it is necessary to identify whether the complainant intended his/her identity and/or the precise terms of the complaint to remain confidential. Where the circumstances surrounding the making of the complaint, or the terms of the complaint itself, do not make the matter clear, it will be necessary to establish whether confidentiality was intended by reverting to the complainant. If the complainant indicates confidentiality was intended in one or more respects, then the principal should indicate his/her willingness to maintain confidentiality subject to any contrary legal requirement. Such contrary legal requirement may include:

♦ Consideration by the FOI [Freedom of Information] delegate of an application for access to any documents under the Freedom of Information Act. (People have a legally enforceable right of access subject only to specifically and properly argued exemptions. The above procedure of establishing confidentiality would help the delegate to argue an exemption.)

♦ The common law requirement that an employee is entitled to be appraised fairly of the case against him/her in disciplinary proceedings.

The general terms of the complaint may be communicated to the teacher. A copy of the original complaint, or transcripts of witnesses’ statements should not be supplied.

The agreement about confidentiality should be documented with the complaint. The statement about not supplying a copy of the complaint or transcripts means that access should not be given in any form. It is not acceptable to show a letter of complaint to the employee or to give a copy.

This is necessary to protect the complainant in relation to the Freedom of Information Act and so in the future:

♦ avoid conflict between the complainant and the staff member
♦ avoid mentioning others who may wish to disclose information about the concern.

Managers jeopardise the anonymity of the complainant unless they closely follow the procedures set down in the AIGs.
Appendix 5: Information Privacy Principles, Freedom of Information Act and Implications for Documentation

Information Privacy Principles

Personal information is defined as ‘information or an opinion, whether true or not, from which a person’s identity is readily apparent or can be readily ascertained’. People have a right of access to their own personal information and may apply to have it amended where it is inaccurate, incomplete, out-of-date or misleading. These rights are exercised through the Freedom of Information Act.

Freedom of Information Act 1991

The Act gives members of the public a legally enforceable right of access to documents held by the Government, subject only to such restrictions as are reasonably necessary for the proper administration of the Government. Applications for access to the records of the Department of Education, Training and Employment are processed centrally through the Legislation and Legal Services Unit. If applicants are not satisfied with a determination the Act provides rights of review and appeal, including external review by the Ombudsman and/or the District Court.

Implications for documentation practices

Documentation needs to be objective, factual, specific and unambiguous. Describe what was observed and do not draw conclusions outside your professional scope. Examples of language which achieves this are given below.

<table>
<thead>
<tr>
<th>Less desirable</th>
<th>Preferable</th>
</tr>
</thead>
<tbody>
<tr>
<td>He was intimidating.</td>
<td>He shook his fist in my face and shouted ‘You’ll be sorry!’</td>
</tr>
<tr>
<td>He became violent.</td>
<td>He punched me on the arm.</td>
</tr>
<tr>
<td>Everything possible has been done.</td>
<td>List what has been done.</td>
</tr>
<tr>
<td>She is paranoid./He is a pervert.</td>
<td>Describe behaviour actually observed and allow readers to draw their own conclusions (eg ‘He wore a saucepan on his head and asked me to turn the light off because of the ultraviolet rays’).</td>
</tr>
<tr>
<td>He was always on the phone.</td>
<td>He rang ten times in two weeks.</td>
</tr>
</tbody>
</table>

Identify opinions as such, rather than present them as facts (eg ‘In my view ...’ or ‘Mrs Smith was of the opinion that ...’).

Identify hearsay (eg ‘He said that he had heard ... but did not see this himself’).

Leave out unnecessary, irrelevant information (eg do not include information about a hangman’s noose on the Hills Hoist in a note about an attendance visit).
Appendix 5: Information Privacy Principles, Freedom of Information Act and Implications for Documentation

Try to provide complete information, which is not misleading (eg ‘Police seized two magazines and two videos. He was subsequently charged with possession of child pornography’ implies that the charges related to all the seized material, when they related only to the magazines).

With regard to complaints and investigations, write in a way that makes it clear that you are keeping an open mind until all the evidence is collected. Include full names so that people can be properly consulted if there is a Freedom of Information application. Observe the Administrative instructions and guidelines (2.76) about establishing the confidentiality of complaints.

Assume that the person will read what you write. Read it through and ask yourself ‘How will I feel when I know she/he has read this? Will I wish I had written it differently? Can I justify what I have written if she/he makes a complaint?’ If you would feel uncomfortable or would find it difficult to produce evidence, rewrite it. All the following comments in department records have been released to the record subject:

‘She appears to be heavily drugged most of the time.’
‘I terminated the interview because she was incapable of being rational.’
‘She is crackers.’
‘Principal says he is a malingerer and a totally negative influence on other staff. Asked if he should put this in his report? Advised him not to.’
‘I recommend that you not meet with them as it would be a waste of time.’

Put your name on notes, not just initials, first names or signatures. Include the name of addressees (eg don’t address notes ‘to Kate from A’). Put the date on notes so that they can be put in context later.

Don’t use abbreviations not in ordinary community use; they may be misunderstood or not understood.

Do not include your own personal business in notes about department business. Do not put your home address or home/mobile telephone number on department documents. This is also relevant for school council correspondence. Notes of meetings and telephone calls kept in diaries are official documents if the information is used for work purposes. It is preferable to keep a separate contact log.

Put separate matters on separate pages where possible (eg telephone calls or meetings with different people, so that it is easier to separate out information which is about one person).

Do not add frivolous comments in the margins of memos and incoming correspondence (eg ‘rubbish’).

For further information, contact: Anne Harris
Project Officer, Freedom of Information
Legislation and Legal Services
Courier: R11/13
Ph: 8226 1607  Fax: 8410 1866
Appendix 6: Feedback Sheet

The performance management guidelines were developed to support implementation of the department’s *Performance management policy*. This edition of the guidelines is released as a work-in-progress so that they can be revised in October 2001 to accommodate feedback from users.

Please complete this feedback sheet and forward to the address below.

<table>
<thead>
<tr>
<th>Contact person (for clarification if needed)</th>
<th>Ph………………………</th>
</tr>
</thead>
</table>

**What do you see are the most valuable aspects of the performance management guidelines?**

<table>
<thead>
<tr>
<th>Please include suggested changes/additions</th>
</tr>
</thead>
</table>

**What else would you find useful in these guidelines?**

<table>
<thead>
<tr>
<th>Any other comments</th>
</tr>
</thead>
</table>

Please forward feedback to: Peter Dow or Margie Darcy
Employee Services
4th Floor, Education Centre
31 Flinders Street
R11/6
Fax: 8410 3912
E-mail: Darcy.Margie@saugov.sa.gov.au
Dow.Peter@saugov.sa.gov.au

Thank you for your time and consideration.