



## PERFORMANCE REVIEW POLICY ERJ 6.7.1

### INTRODUCTION

Edmund Rice Justice Aotearoa New Zealand Trust's Annual Performance Review process has been designed to provide a vital link between the organisation's Business Plan, its vision and guiding principles, and individual staff members. It is also designed to ensure that goals and objectives flow from the top of the organisation to the personal objectives of each individual.

This Policy applies to permanent and part-time paid employees only. If requested, volunteer workers can participate in and have access to an annual review in order to obtain feedback regarding their position and performance.

### PURPOSE

The purpose of this policy is to ensure that a consistent approach is followed for conducting Annual Performance Reviews, and that job-related skill and knowledge, and employee competencies and behaviours, are evaluated and compared against set standards and business objectives.

### POLICY

During the first month of an employee's commencement in a role, Managers will work with the employee to develop a Performance Plan which will be updated during the Financial Year Period. The Performance Plan will outline the employee's goals and objectives for a 12-month period in line with the organisation's Business Plan.

Similarly, a Development Plan will outline the individual's development priorities for the following 12-month period, as well as reviewing any for the previous 12 months. Consideration should also be given to the individual's long-term career objectives.

The Chair will conduct a formal Annual Performance Review with each employee within the first six weeks of the new financial year for the review period from 1<sup>st</sup> July to 30<sup>th</sup> June of the previous financial year (or specified period or time frame). Progress reviews may be conducted on an informal basis more frequently throughout the financial year.

Periodic assessment and discussion of performance will be carried out throughout the course of the review period between Managers and each of their employees on an "as needed" basis.

## **AUTHORISATION**

Chair

2015

Edmund Rice Justice Aotearoa New Zealand Trust

Policy number	ERJ 6.7	Version	1
Drafted by	James Devereaux	Approved by Board	
Responsible person	ERJANZ Board	Scheduled review date	March 2017

## PERFORMANCE REVIEW PROCEDURES ERJ 6.7.1

### RESPONSIBILITIES

It is the responsibility of the **Chair** to ensure that managers and supervisors

- familiarise themselves with the performance management system objectives and procedures;
- carry out their responsibilities according to this policy.

It is the responsibility of **Employees** to:

- participate openly and honestly in planning and assessing their own performance objectives and receiving feedback from their Manager or Supervisor.

It is the responsibility of the **Board** to:

- continually review and refine the performance management system to ensure it will support the achievement of the organisation's objectives, and which will fairly and consistently evaluate each individual's performance against these objectives;
- provide ongoing development of Managers' skills that are required to effectively conduct performance reviews;
- ensure that all Managers are aware of their responsibilities in the performance management process;
- provide ongoing support and guidance to Managers with performance management issues.

## **PROCEDURES**

### **Performance Management and Performance Plan**

The Performance Plan is designed to provide the opportunity to establish targets (Indicators of Effectiveness) which provide a challenge to employees and which can be reviewed and modified in response to employee achievements.

The Manager concerned should develop a Performance Plan in conjunction with the employee within the first month of an employee commencing or during the Annual Review process. The Performance Plan is to be updated during every Annual Performance Review or as required throughout the course of the financial or performance year.

Employees should initially draft their own Performance Plan and then arrange a discussion with their Manager so that the Plan can be agreed and finalised. If a situation occurs in which the employee and Manager are unable to come to an agreement, both the employee and the Manager should attach a memo outlining their position, and forward the Performance Plan to the next-in-line Manager for a final decision.

The Performance Plan should outline goals and objectives for the following 12-month period. It is each Manager's responsibility to ensure that these are in line with the business plan. Each objective should have targets and measures documented, to allow accurate assessment.

The Performance Plan will also include an agreement of what competencies are to be demonstrated in the role.

### **Development Plan**

During the Annual Review process, or the first month of commencing employment, each employee should have a Development Plan established. The Development Plan discussion should review the individual's development over the previous 12 months, and outline the individual's broad career directions and development priorities for the following 12 months.

The Manager should consider what skills, knowledge and competencies are required to achieve the objectives outlined in the Performance Plan, and to close the gap on current and planned competencies.

### **Annual Review**

Each year in the first six weeks of the new financial or performance year, Managers must complete an Annual Performance Review interview with their employees.

The Manager must review the employee's performance against his or her agreed performance objectives, targets and measures, as well as performance against the agreed competency levels.

The individual's agreed performance objectives and competencies should be reviewed against the set performance ratings.

To ensure a degree of objectivity is apparent throughout the review process, the "next-in-line" Manager will continue to be involved in the review process and must agree with the review and sign it off.

## Link to Salary Review Process

The Annual Performance Review process can be linked to the salary review process.

People should be rewarded on the basis of their contribution to the organisation though either an annualised salary adjustment (increase in base pay) or a one-off reward – e.g. bonuses, plaques, lunches, certificates, etc.

## RELATED DOCUMENTS

- [Staff Recruitment Policy](#)
- [Professional Development Policy](#)

## AUTHORISATION

Chair

2015

Edmund Rice Justice Aotearoa New Zealand Trust

Procedure number	ERJ 6.7	Version	1
Drafted by	James Devereaux	Approved by Board	
Responsible person	ERJANZ Board	Scheduled review date	March 2017