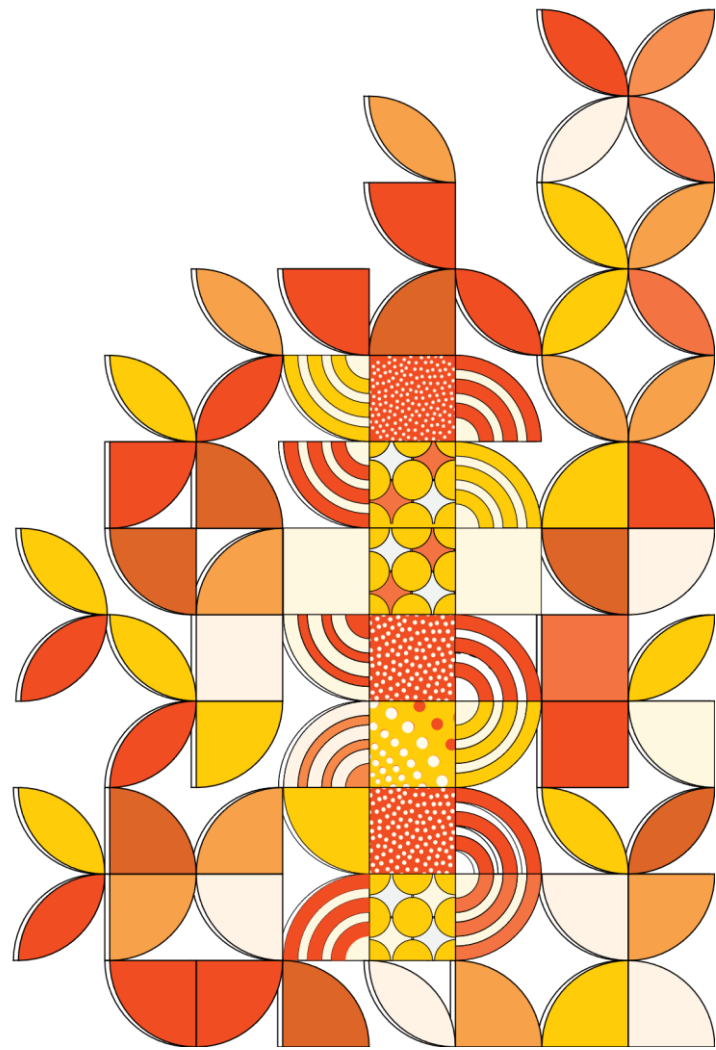


Performance Management Procedure



SECTION 1

Purpose

1. The Institute of Health and Management (IHM) is committed to ensuring the success of its employees. Through the performance management process, a constant line of communication will be established, beginning with the onboarding process, and continuing throughout the duration of the employment relationship. The performance management process provides an avenue to review performance and establish goals for the next review process.

Scope

2. This This procedure applies to all full-time, part-time, and ongoing casual employees.

Definitions

3. Definitions for key terms are presented in the [Glossary of Terms](#).

Suite documents & Systems

4. This Policy is linked to the following:
 - a) Performance Management policy
 - b) MyHCI(Elmo) HRMS
 - c) See also Associated Information listed in the 'Related Internal Documents' in Section 3 below.

SECTION 2

Procedure

5. An effective performance management system is essential for nurturing employee growth and attaining organisational objectives. In the realm of IHM, performance evaluation occurs via the MyHCI (ELMO) Portal, ensuring a structured approach to performance assessment.
6. Onboarding employees will receive a copy of their position description (PD) along with their employment agreement through MyHCI (ELMO) Portal, setting out the accountabilities required within the roles and Key Performance Indicators (KPI) to be measured. They will receive individual briefings on each aspect of their position descriptions from their immediate manager as part of their induction process.
7. The managers / team leaders / employees will undergo training conducted by the internal learning and development team on how to conduct a performance appraisal using the MyHCI (ELMO) Portal for performance planning discussion, goal setting, strategic checkpoints for goal alignment, progress assessments, providing constructive feedback, and fostering collaborative discussions between manager and employee to meet professional development needs. Training videos about the monthly and annual performance review are available for the employees in the MyHCI (ELMO) learning for anytime reference.
8. Performance appraisal enables work performance to be reviewed based on capabilities and the achievement of specific performance objectives. At IHM, the performance review is conducted in Monthly reviews, one Annual appraisal Review and a probationary review for the beginners.
9. **Probation Review**
The probationary review for new staff spans six months and includes the following phases:
 - 9.1 **Planning and Objective Phase:**

- a) Collaboratively setting the Goal/ key performance indicator (KPIs) for the Job role, Measures for each KPI, development objectives, and competencies.
- b) Addressing training needs and identifying development opportunities to foster employee growth.

9.2 Action Phase:

- a) The action phase consists of two checkpoints. These strategic check points between manager and employee at the end of Month-2 and Month-4 foster collaborative discussions.
- b) The checkpoints provide invaluable opportunities for goal alignment, progress assessment, and constructive feedback, ensuring a dynamic and proactive approach to performance improvement throughout the probation period.

9.3 Buddy Review:

- a) During the Buddy Review Phase, an assigned team members provide constructive feedback on colleague's performance, fostering a culture of collaboration and continuous improvement.
- b) Buddy members would be decided by the reporting manager and peer can be any one from any department throughout the organisation. The assigned buddy member will have to rate the colleague based on a set of questionnaires.

9.4 Self-Scoring Phase:

- a) In this phase, employees will be prompted to complete a self-assessment, encouraging timely participation.
- b) This self-assessment encompasses rating performance, recording accomplishments, and pinpointing challenges.

9.5 Manager Scoring Phase:

- a) In this phase, managers conduct a review of the employee's self-assessment, gaining valuable insights into the employee's perspective. They then offer feedback and comments, thereby finalising the review process.

9.6 Approval Phase

- a) Following the manager's scoring, the People & Culture Team will proceed to review and approve the performance review assessments.

9.7 Complete Phase:

- a) The system will generate a probation review report summarising the employee's and manager's scores. This report helps with decision-making processes which could include determining whether to continue probation, modify its conditions, or recommend for confirmed employment.

10. If the employee completes the probation review within any of the annual checkpoints (see 11.2), they will enter the subsequent checkpoint in the annual review cycle. If the employee completed the probation period in October, they will only be considered in the next annual review cycle (see 11.1).

11. Annual Performance Review

11.1 The annual review cycle commences on 15th January, ensuring a well-organised start and all review activities will conclude by 31st December. The phases, encompassing **planning** (see 9.2), **self-scoring** (see 9.5), **manager scoring** (see 9.6), **approval** (See 9.7), and **completion** (see 9.8), will remain unchanged.

11.2 **Implementation and Monitoring Phase:** Following the Planning Phase, strategic Checkpoints will occur in April, June, and October to facilitate discussions on aligning goals, tracking progress, and providing constructive feedback.

11.3 Peer Review: Following Implementation Phase, team members, chosen by reporting managers, provide constructive feedback on colleagues' performance via MyHCI (ELMO), fostering a culture of continuous improvement.

11.4 Approval Phase-Second Level Manager: After the Manager Scoring Phase, second-level managers review and endorse performance assessments through MyHCI (ELMO), ensuring a thorough evaluation process and enhancing the fairness of assessments.

12. Monthly Performance Review

12.1 Monthly performance evaluations provide valuable opportunities to assess progress, address challenges, align with KPIs, provide constructive feedback, and set new goals.

12.2 The phases, encompassing **Action Phase for allowing for goal / measure setting, self-scoring** (see 9.5), **manager scoring** (see 9.6), and **completion** (see 9.8), will remain unchanged.

12.3 This will help the employees in verifying their alignment with KPIs by conducting self-assessments and assigning ratings for each KPI. Subsequently, managers provide ratings for each team member monthly.

13. Managing Underperformance

13.1 If a team member is not meeting the expectations or partially meeting the expectations, an exclusive meeting will be organised between manager and the team member to address the current situation, identify concerns, and collectively agree on steps for improvement.

13.2 Managers are required to assign relevant training or courses to enhance the performance of the underperforming team members through MyHCI (ELMO) Portal.

13.3 A reasonable period for performance improvement will be provided facilitating multiple conversations between manager and team members. All the formal conversations will be captured in the MyHCI performance conversations.

13.4 If the performance has improved to a satisfactory level, acknowledge the resolution of the issue, and discuss strategies for sustaining the improvements.

13.5 If an employee's performance doesn't improve after a reasonable timeframe and feedback, consistent underperformance over a two-month period may result in conclusion of employment.

SECTION 3

Associated Information

Related Internal Documents	Performance Management Policy Recruitment, Selection and Appointment Policy Staff Professional Development Policy Staff Professional Development Procedure
Related Legislation, Standards, and Codes	HESF (2021). Higher Education Standard Framework Domain 6: Governance and accountability Fair Work Act 2009 Equal opportunity Act 2010
Date Approved	15.07.2024
Date of Effect	16.07.2024
Date of Next Review	30.06.2027

Approval Authority	Executive Management Committee
Responsibility for implementation	People and Culture Department All managers with direct responsibility for staff
Document Custodian	People and Culture Manager
IHM Doc ID	IHM - PMP1 – 3.0

Change History

Version Control		
Change Summary	Date	Short description of change, incl version number, changes, who considered, approved etc
Version 1.1	23/11/2013	<ul style="list-style-type: none"> New Policy approved by the Board of Directors
Version 2.0	28/04/2023	<ul style="list-style-type: none"> Policy and Procedure are separated in two separate documents Definitions added Editorial and formatting changes have been made Approval Authority changed from Quality Assurance and Risk Management Committee to Executive Management Committee Version 2 approved by the Executive Management Committee on 28/04/2023
Version 2.1	29/11/2023	<ul style="list-style-type: none"> The definitions have been relocated to the IHM glossary and the template has been updated.
Version 3.0	15/07/2024	<ul style="list-style-type: none"> Reviewed and Updated Major update on the performance management procedure based on MyHCI ELMO software