

Questions & Answers (Q&As)

Leaders - Performance Partnerships

Self-reflection and annual review

What are my responsibilities as leader?

During the self-reflection and annual review stage, you are required to ensure your direct reports complete a self-reflection in Culture Amp. As a leader, you'll be notified when your employees have completed their self-reflections via email from Culture Amp.

Once the employee's self-reflection has been completed, you will:

- Write each direct report's performance review. When you complete the performance review, make sure to review your employee's current and past self-reflections, goals, feedback received from others and any notes you may have about them.
- Assign an overall performance rating.
- Once the calibration with Senior Leaders has been completed, Leaders will then meet with their direct reports to share outcomes. This includes their performance rating, contributions, impact, strengths and development areas. **Do not** share outcomes of the review until after the calibration has taken place, this is to ensure that performance is evaluated fairly and consistently across the organisation. We will let you know when it is time to share the performance reviews with your direct reports.
- You will also receive a notification when you can share the documented performance reviews with direct reports via Culture Amp at your 1-on-1s (mid-late August).

What is the purpose of performance reviews?

The purpose of the performance review is:

- Develop and build a culture of trusted and genuine partnerships.
- Provide feedback for performance improvement and development and recognise performance contributions of your direct reports.
- For employees not paid under an award, it informs one component of the remuneration review. Other contributing factors include organisational financial performance, as well as the market position of the role.
- Support succession planning and talent mapping.

Will all employees need a performance review?

All employees within enabling functions and Community Solutions Group are to have a performance review completed.

Home and Community, and Work Divisional Leaders, Operational Leaders and above, will also be required to complete a performance review. Some new employees, still in a probationary period, will not need a performance review until their probationary period is completed. The guidelines for new employees are:

1. New employees in their probation period and who commenced between the April 1 and June 30 do not require a performance review or rating in Culture Amp.
2. New employees in their probation period and who commenced prior to April 1, will require a performance review and rating in Culture Amp.

This is because new employees in category 2, and who are not paid under an award, are eligible for a remuneration review. A performance rating in Culture Amp is one of the components in determining remuneration outcomes.

How should performance ratings be applied?

The expectation is for *the majority of* employees to receive the performance rating of **Strong Performance**. The Strong Performance rating means the employee has delivered on their job responsibilities, fully met performance expectations, demonstrated our values and made meaningful contributions.

Leaders need to provide evidence of additional contributions / deliverables over and above what is expected to demonstrate why an individual has been rated as **Leading Performance** or **Sets a New Standard**. Examples might be achieving significantly greater sales than had been set for individual sales target KPIs, coverage of two positions due to a vacancy for an extended period, or proactively identifying and implementing improvements that have an impact on Endeavour Foundation’s success.

Individuals who are not yet meeting all expectations (e.g. who require feedback and support with delivering specific expectations) and/or who have recently transitioned into a new role should be rated as **Building Performance**. Whilst individuals on a formalised Improving Performance Plan would be rated as **Improvement Needed**.

Ratings descriptors are available in Culture Amp and outlined below:

<p>Improvement needed: goals and objectives have not been met in the agreed timeframe. Role responsibilities and/or agreed outcomes have not been delivered.</p>	<p>Building performance: objectives are still in progress/ some objectives achieved. Building proficiency in role</p>	<p>Strong performance: achieved majority of agreed objectives and met deadlines (unless objectives deferred or delayed for business reasons). Met expectations of role</p>	<p>Leading performance: accomplished all agreed objectives within agreed timeframes and made additional contributions. Delivered more than expected in some areas</p>	<p>Sets a new standard: work delivered is of an exceptional standard; delivered more than expected and/or faster than expected in most areas. Identified improvements and proactively implemented them</p>
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How do I share the outcome of the performance review with my direct report?

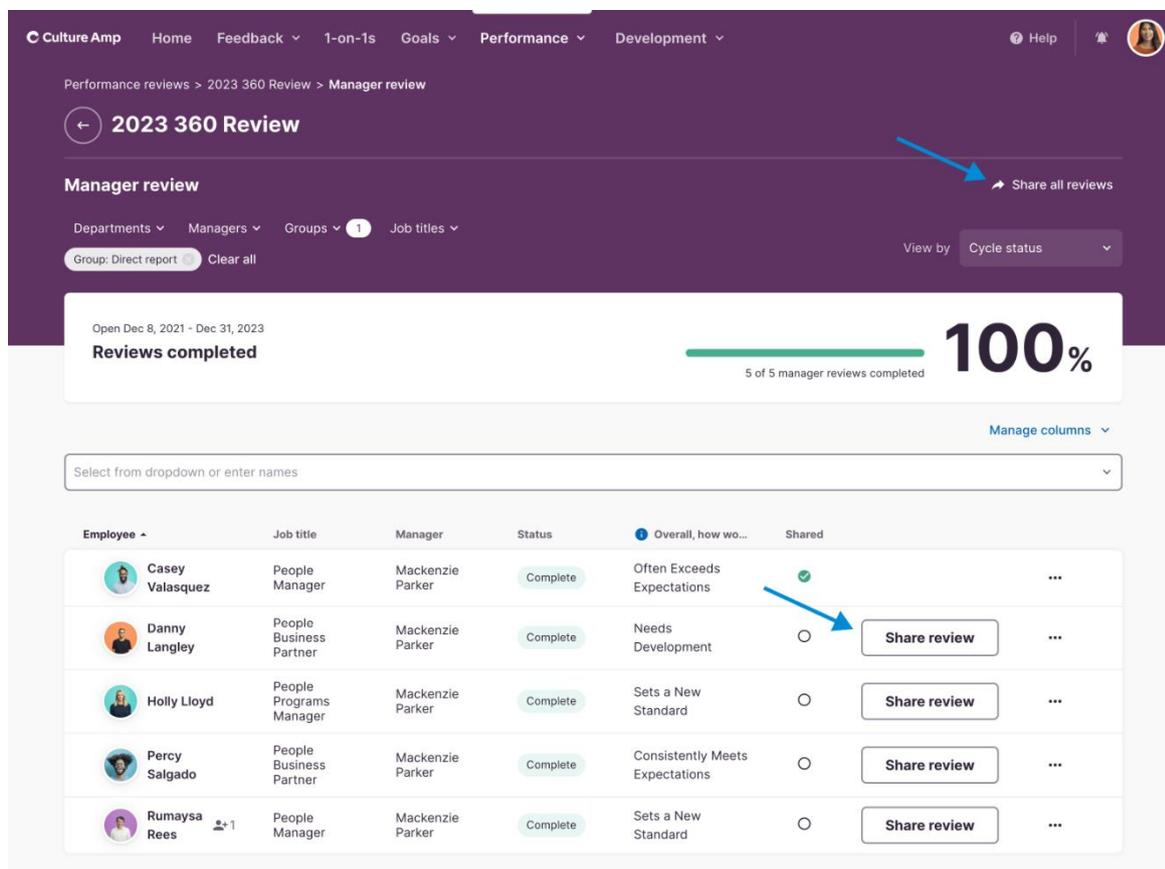
All leaders are to deliver performance reviews verbally via a conversation. Once the performance rating calibration process is finalised, the People and Wellbeing team will advise you when it's time to share performance outcomes verbally and review responses in Culture Amp with your direct reports.

Sharing responses to open-ended questions helps the employee learn and grow as well as create a sense of accomplishment. Culture Amp recommend performance ratings to be verbally communicated rather than shared via the system; for this reason, they are not included in the shared review.

Once I have communicated the ratings, how do I share the narrative/commentary sections of the review in Culture Amp?

Once you have communicated the ratings, you can share the narrative/commentary sections of the review in Culture Amp using the steps below:

1. Find reviews by navigating to *Performance > Reviews*
2. Select a review under either the *Current* or *Past* sections
3. You can start to share your review by selecting the *Share manager reviews* tile:
 - a. To share the review per direct report, select the *Share review* button against the associated row
 - b. To share all reviews with all direct reports, select the *Share all reviews* option:



Performance reviews > 2023 360 Review > Manager review

← 2023 360 Review

Manager review

Departments ▾ Managers ▾ Groups ▾ 1 Job titles ▾

Group: Direct report Clear all

View by Cycle status ▾

Open Dec 8, 2021 - Dec 31, 2023

Reviews completed

5 of 5 manager reviews completed

100%

Manage columns ▾

Select from dropdown or enter names

Employee	Job title	Manager	Status	Overall, how wo...	Shared
Casey Valasquez	People Manager	Mackenzie Parker	Complete	Often Exceeds Expectations	<input checked="" type="checkbox"/>
Danny Langley	People Business Partner	Mackenzie Parker	Complete	Needs Development	<input type="checkbox"/> Share review
Holly Lloyd	People Programs Manager	Mackenzie Parker	Complete	Sets a New Standard	<input type="checkbox"/> Share review
Percy Salgado	People Business Partner	Mackenzie Parker	Complete	Consistently Meets Expectations	<input type="checkbox"/> Share review
Rumaysa Rees	People Manager	Mackenzie Parker	Complete	Sets a New Standard	<input type="checkbox"/> Share review

Once shared, your direct report will receive an email allowing them to access each of the questions from the review marked as "*may be shared*".

If *Review Acknowledgements* have been included in the performance review cycle, your direct report will also be able to mark their review as "*acknowledged*" following the review conversation they have with you.

It's important to note that the ability to acknowledge a review is only made available if the review has been shared with the employee. No notifications are sent out when your employee marks the review as acknowledged.