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**Unit 8: Develop & Manage Performance Management Processes**

Unit of Competency – BSBHRM512

Performance Evidence

**Workplace Assessment**

**There are 3 Parts to this assessment**.

Part 1 is to be completed after finishing Topic 1 “Develop integrated performance-management processes”,

Part 2 is to be completed after finishing Topic 2 “Facilitate the implementation of performance-management processes”,

Part 3 is to be completed after finishing Topic 3 “Coordinate individual or group learning and development”.

**Key Components of a Positive Development System**

**(Based on The Proteus Performer)**

**Promote and Market**

Scheduled training & information sessions

**Develop Position Descriptions**

Using Generic KPI’s for all staff

**Management Evaluation**

Management Evaluation forms to be completed

**Staff Evaluation**

Employee Evaluation forms to be completed

**Conduct Interview**

2 weeks after the forms have been distributed

**Develop Professional Development Plans**

Include any personal and professional development outcomes from the interview with employee

**Develop Departmental Action Plans**

Transfer information from Personal Action and Development Plans into Departmental Plans

**System Links into**

**Organisational Strategic Planning**

Using Action and Professional Development Plans as a basis for strategic planning

**Part 1 – Developing a Performance Development Process**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the first topic *‘*Develop integrated performance-management processes’*.*

In Part 1, we will look at implementing stages 1 and 2 of the Performance Development System. You are required to complete steps 1 and 2.

**Step 1 – Promote to Market**

You are the head of the committee within your organisation that has been appointed to develop and then introduce a new Performance Development system.

In the past, Performance Development has been a very negative experience and therefore you know that there is going to be a level of resistance from some people.

### You have been given 6-months to have it up and running.

|  |  |
| --- | --- |
| **Establish a Committee**  Identify the position of each person on the committee. |  |
| **Action Plan**  Put together a monthly plan of action for the 6-month period for how you will market and promote Performance Development | Month 1  Month 2  Month 3  Month 4  Month 5  Month 6 |
| **Handling Objection**  What objections are you likely to experience?  How are you going to handle the staff who oppose the new system? |  |
| **Tracking**  What measurement tools will you use to ensure that you are on track? |  |
| **Other Considerations**  What other things need to happen to improve staff morale and to assist in making the environment a more positive one in which to work? |  |

**Step 2 – Develop Position Descriptions**

Using generic KPI’s for all staff, develop 6 Key Result Areas for the team.

|  |
| --- |
| KRA |
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |
| 6. |

*Please return online and continue with Topic 2 –* Facilitate the implementation of performance-management processes*.*

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**Part 2 – Implement Performance Development Process**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the second topic *‘*Facilitate the implementation of performance-management processes’*.*

In this Part, we will look at implementing stages 3 of the Performance Development System. You are required to complete steps 1-3.

To complete this assessment you will need to document parts of your preparation for upcoming Performance Review’s taking place in your team. You will need to work with your manager and the HR Department as you progress through this assessment. Please note, for this assessment you will be required to perform a performance review with a member of staff.

**Step 1 - Staff Evaluation**

Send the following staff evaluation form to a staff member and ask them to complete it.

|  |  |  |  |
| --- | --- | --- | --- |
| **KRA** | **What have been your major achievements in this area?** | **What have been the major obstacles that hindered you in this area?** | **What ideas and solutions do you have to overcome these obstacles?** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |
| 6 |  |  |  |

**Step 2 - Management Evaluation**

As the manager you will also need to complete an evaluation form for the staff member.

|  |  |  |  |
| --- | --- | --- | --- |
| **KRA** | **What have been their major achievements in this area?** | **What Improvement do you think they can make in this area?** | **What recommendations do you have for them?** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |
| 6 |  |  |  |

**Step 3 - Conduct Performance Review**

Here you are required to conduct a performance review using the information obtained in steps 1 and 2.

This should be conducted 2 weeks after the forms have been distributed.

**Question 1**

What are the key insights from your meeting?

**Your Response:**

**Question 2**

Have you identified a position within the team the staff member could be developed for succession planning?

**Your Response:**

*Please return online and continue with Topic 3 –* Coordinate individual or group learning and development*.*

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**Part 3 – Co-ordinate Learning & Development**

**ASSESSMENT INSTRUCTIONS**

You should have now read the content and completed the short answer questions for the fourth topic *‘*Coordinate individual or group learning and development’*.*

In this Part, we will look at implementing stages 4 of the Performance Development System and create a succession plan for your position and your team. You will be required to complete steps 1 - 4.

**Step 1 – Develop Professional Development Plan**

Based on the performance review. Create a learning and development plan for the individual for each of the 6 KRAs.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **KRAs** | **Suggested Development** | **Timeframes** | **Action To Make It Happen** | **Approval & Communication** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |

Please note, depending on your position within your organization you might like to transfer the information from these individual action plans into the Departmental plans. Alternative you might like to forward this information onto your manager.

**Step 2 – Succession Plan For Your Position**

Assuming you are retiring in 12 months' time, develop a succession plan for your current position:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Position** | **Strategy** | **Candidate** | **Internal/ External** | **Date Ready** | **Development Plan** |
|  |  |  |  |  |  |

**Step 3 – Succession Plan For Your Team**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Position** | **Strategy** | **Candidate** | **Internal/ External** | **Date Ready** | **Development Plan** |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |
| 5. |  |  |  |  |  |
| 6. |  |  |  |  |  |

**Step 4 - Manager’s Sign Off**

Once you have completed the above meet with your manager to gain feedback and get sign off for this Unit. *Please note, your manager must provide written feedback in the space below*

If you are unable to meet with your manager there are 2 other options available for sign off:

1. Attend a Proteus Implementation Day
2. Arrange an appointment with your Proteus Coach

|  |  |  |
| --- | --- | --- |
| **Develop & Manage Performance Management Processes – Workplace Assessment** | **Yes** | **No** |
| Did the student develop, implement, monitor and review an organisational performance management process which supports business goals including analysing the organisational strategic and operational plan? |  |  |
| Did the student design methods for the development of key performance indicators and formal performance management sessions by line managers? |  |  |
| Did the student consult with stakeholders to gain support? |  |  |
| Did the student design, develop, coordinate and implement individual and group learning and development? |  |  |
| Did the student train line managers and other relevant people to manage performance? |  |  |
| Did the student provide support to line managers to effectively manage performance issues, including dispute resolution and termination of employment? |  |  |
| Did the student develop approaches to improve performance and address identified performance gaps? |  |  |
| **Feedback – Skills Performance** |  |  |
| What feedback can you give you the staff member regarding the standard of their performance in these skills listed above? (50-100 words). Please consider areas of success and areas of development. | | |

**Managers Name:**

**Managers Job Title:**

**Managers Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date:**

**ASSESSMENT INSTRUCTIONS**

This is the end of the Workplace Assessment.

Please now go online to the topic menu for ‘Unit 8 – Develop and manage performance management processes’ and click on the box **‘Workplace Assessment’** to submit your Workplace Assessment.

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**Grading and Feedback.**

Feedback will be provided for each question through the Online Learning System. You will receive an email notification of feedback being posted.

If there are any required changes you will be given an opportunity to resubmit.

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