

# Preparing for performance and development conversations

## QUICK REFERENCE GUIDE FOR EMPLOYEES

Performance management and development conversations are the primary channel for employees to clarify what is expected of you and then track your progress and achievements at work. While it is mandated that all employees in the South Australian (SA) Public Sector participate in a performance management and development review at least twice per year, informal conversations can and should take place day-to-day and throughout the course of the year. Your Manager may initiate some of these conversations periodically but there is no reason why you can't also initiate them to help clarify expectations, priorities or where you might need specific support or development. Either way, good quality preparation is essential in order for you to take ownership for shaping and delivering on your performance and development plan.

### BENEFITS OF PREPARING FOR PERFORMANCE AND DEVELOPMENT CONVERSATIONS

- Helps you to achieve the performance and growth that you are looking for in your role and within the SA Public Sector.
- Clarifies your thinking and identify key questions that you want to work through with your Manager  
It provides you with the opportunity to shape and influence your performance objectives, potentially highlighting areas where you can make new contributions and play to your strengths.
- Helps your Manager understand your perspective and what support and resources you need from them to help you perform to your best  
Puts you in charge of your performance and development by taking ownership and actively participating.

### WHEN TO PREPARE

Good preparation is key to getting the most out of performance management and development conversations. You will likely need to invest more time in preparation when you are new to a role, when you initially establish your performance and development plan, or for your performance management and development reviews. Once you have established a structure and rhythm to your conversations with your Manager you will tend to find that this becomes easier and quicker during the year. Some key situations where you might need to do some preparation include:

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- If you have recently joined the organisation; all new public sector employees are required to draft an initial performance and development plan within the first 90 days of employment
- In the lead up to formal performance management and development review meetings that are conducted at least twice per year
- As part of your normal preparation for one-to-one meetings with your Manager during the year
- At the key milestones during extended projects/ programs of work or formal project implementation reviews
- After important meetings, key events or incidents that take place, to identify any specific learning points or actions that need to be taken
- When something changes in your personal situation which could impact on your contribution at work.

## WHAT IS NEEDED - INPUTS TO PERFORMANCE AND DEVELOPMENT CONVERSATIONS

Here are some key reference materials and inputs that will assist you in preparing and having focused performance management and development conversations:

- Role description – this outlines the overall scope of performance for your role.  
Goals/Objectives – these outline the specific performance outcomes and priorities that you have agreed with your Manager at the beginning of the annual performance cycle.
- Standards – these include the Code of Ethics for the South Australian Public Sector, the SA Public Sector Values, and any other competencies or standards that have been defined for your role and your agency.
- Relevant data – objective data from specific measures identified for each goal/objective that has been agreed, ideally in a quantitative form e.g. number of cases handled, projects delivered on time, cost savings achieved.
- Key examples – some examples of specific achievements you have made or challenges you are experiencing in your day-to-day work.
- Feedback from relevant parties - e.g. from other managers, customers, stakeholders, team members, colleagues in different departments. Using multiple sources of feedback will make your self-assessment of performance more robust and representative.

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### HOW TO PREPARE

The flow of an annual performance cycle means that there are some conversations which have more emphasis on forward planning, and others that are more about reviewing progress against plans that you have agreed and put in place.

For forward planning conversations:

- Familiarise yourself with other plans which are already agreed and in place for your organisation such as the strategic plan, business plan, operational plans and your Manager's performance plan or objectives.
- Reflect on what you bring to the table – your individual strengths, the way you tend to learn best, and what your longer term career goals are. For more guidance on these, see the quick reference guide here.
- Draft some objectives for yourself using the S.M.A.R.T. framework and share these with you your Manager prior to your formal Performance and Development Planning meeting. For more detail on how to set S.M.A.R.T. objectives, see the quick reference guide here.
- Consider the resources and support you will need in order to deliver on these objectives and where you may need inputs or guidance from your Manager.
- Think about development activities that will be relevant to support you in achieving the objectives you drafted – what on the job experience or practise, learning from others, or formal training will be relevant?
- Any other changes that your job role that you may want to explore with your Manager.

For review and ongoing conversations:

- Gather supporting information from the measures you have identified and any feedback those you have been working with.
- Conduct a self-assessment of your progress to date, using your role description, objectives and any relevant standards or competencies that might apply to your role (e.g. the Code of Ethics and SA Public Sector Values) as your criteria.
- Think about any questions you want to ask your Manager, areas where you need to clarify requirements, or specific tasks where you need their help to move things forward  
Reflect on any new information you have received or changes in work demands which you have recognised which could impact on your priorities.
- Prepare and specific feedback you may want to share with your Manager regarding how they work with you – either constructive or appreciative feedback. For more guidance on how to give and receive feedback, see the quick reference guide here.

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Some useful questions to ask yourself as part of your preparation for review meetings might include:

- How have I fulfilled the full scope of the accountabilities as outlined in my role description?
- What outcomes have I delivered in relation to my individual goals/ objectives? Were these on time, on budget, to the right quality?
- What does the objective evidence from the specified performance measures indicate? How does this compare to baseline measures or other relevant benchmarks?
- What have I demonstrated in terms of my behaviour in the way I have played my part? How does this fit with the Code of Ethics, SA Public Sector Values, and other competencies or standards that your agency uses?
- Have there been any situational factors which have impacted my performance in some way?
- Are the other activities or contributions that I have made to the organisation outside of my job role, goals or objectives which I need to share with my Manager?
- What impact have I made had on customers, my team members, the broader agency, other stakeholders?

## DIFFERENT TYPES OF LEARNING

There are a number of different ways that employees can develop at work, and using a combination of different approaches may be necessary to get the best outcomes. There has been a tendency in the past for people to assume that all development takes place through formal training or education, but studies into adult learning in the workplace shows a different pattern.

-  **70%** On the job experiences – about 70% of learning at work takes place on the job through solving problems, project work, secondments and other day-to-day activities. This is about learning from experience, from the challenges, problems and opportunities that the work of everyday brings. In other words, learning by trying things out for yourself and seeing what works in real situations.
-  **20%** Relationships and feedback – another 20% is self-directed learning and could include drawing on the knowledge of others in the workplace, work-shadowing, informal learning, communities of practice, personal reading, internal coaching and mentoring, and support and direction from managers and colleagues. In other words, learning vicariously from observing other people or drawing down on their experience.
-  **10%** 10% formal training – only about 10 % of learning occurs through formal learning, whether a face-to-face workshop or online course.

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The implication of this is that there are likely to be a wide range of development activities that can be identified within the scope of your current job, contacts, and resources in your organisation before formal training. These are also more likely to lead to practical transfer of learning which enhances your job performance.

### LEARNING STYLES

Not everyone will take in new information and learn in the same way. Some people find that having visual cues, diagrams, or pictures to be the best way to grasp new concepts and how they fit together. Others prefer to talk through new approaches with other people who have experience in using them. Some like to read about the theory and summarise the key points for themselves before putting things into practice. Others prefer to be “hands on” and jumping straight in to try things out for themselves so they can learn by trial and error. It is useful to identify your most effective style of learning so that you can incorporate this into your development plan.

Where possible, it is better to have at least some activities that correspond to your learning style so you are energised and motivated to take these forward. Otherwise, you may tend to look at your development plan as a series of chores rather than stimulating activities. There are a number of structured questionnaires and profiling tools available that can help draw out someone’s learning style if you are having trouble pin-pointing what works best for you. Ask your Human Resources team for advice as to how you can do this.

### KEY POINTS

- Performance management and development conversations are important for enabling performance, both for you as an individual employee and the organisation as a whole.
- To develop a meaningful performance and development plan and have good quality conversations with your Manager, you need to invest some time to prepare. This puts you in charge of your performance and development.
- Understanding your individual strengths, preferred learning style and career goals for the future will assist you in making your performance and development plan unique and relevant to you as an individual.
- You need to have both specific examples and relevant data in order to conduct a structured self-assessment of your performance. Gathering input from multiple sources helps you to make this more robust and representative of your overall contribution.