

Performance and Development Agreement Report

Employees and managers should complete this together and treat it as confidential, with access restricted to the signatories (copies may be provided to relevant management/ delegates and People and Culture as required).



People and Culture

Prior to meeting – the employee and manager should review the performance and development discussions fact sheets available on the intranet and seek advice from People and Culture if required.

Employee details

Employee name	
Employee number	
Position title/s	
Work unit/s	
Manager name/s	
Date of discussion	

Reflections on the last 12 months

Performance against key responsibilities/duties and agreed actions from last 12 months

Refer to Statement of Duties and performance and development discussions fact sheets. Add additional fields as required.

Include comments on achievements and areas for improvement.

1	
2	
3	
4	
5	
6	
Reflection Personal behaviour, contribution to positive team culture and living our <u>CARE Values</u>	
Reflection Execution of specific role/work area responsibilities/obligations (eg safety & quality, WHS, child safety, mandatory reporting, confidentiality, cybersecurity)	

Learning and development

Mandatory training completed	<input type="checkbox"/> Yes – please list: <input type="checkbox"/> No - outline what actions will be undertaken to rectify this in the 'Opportunities for development in the next 12 months' section.
Comments on any learning and development undertaken	

Overall Comments

Overall comments – Manager	
Overall comments – Employee	

Planning for the next 12 months

Agreed actions and opportunities for development in the next 12 months

Document any agreed actions, development activities or mandatory training to be completed for the next 12 months, including timeframes for action/objective to be met, how the manager will support the action and a review date to monitor progress. Make sure each action is clear, achievable, specific about the standard expected, appropriate for role and classification. Add additional fields as required.

1	
2	
3	
4	
5	
6	
What actions can be taken to contribute to positive team culture, and living our CARE Values?	

General Comments

General comments – Manager	
General comments – Employee	

Leave planning

This section can be used to document discussion of leave considerations. For example, excess leave balances and Long Service Leave and Annual Leave planning. If required, refer to leave management resources on the intranet, or seek advice from People and Culture.

--



Sign off

Employee		Date	
Manager		Date	
Delegate <i>If manager does not have delegation</i>		Date	

Next steps

Determine the date of next discussion.

Date of next discussion	
--------------------------------	--

Manager to retain signed document and provide a copy to the employee.

Contact People and Culture

If you have any HR related queries, visit the [service portal](#) or call 1300 812 535.

