

Staff performance and development checklist

Position description

- All staff should be given a position description on commencement that establishes their role within the practice, including the scope and responsibilities of the role. This can then be used as a basis for ongoing evaluation and review of the position and the individual's performance in the role. In addition, a duty list should also be established that outlines the daily duties required to fulfil the role.
- Include the lines of reporting for all staff.
- Include the limits and extent of authorities for all staff.

Performance assessment (3 month)

- Performance should be assessed at least three months after commencement of employment and annually, or sooner if required, by the relevant manager.

Position description assessment

- Performance should be assessed based on compliance with the relevant position descriptions, which should be reviewed regularly according to the needs of the practice. You may need to seek the agreement of a staff member before making changes to the position description. Performance assessment should also be based on relevant training requirements and competencies.

Open discussion

- All discussions should be honest and open and allow an opportunity for both parties to discuss the relevant issues.

Performance appraisal tool

- A performance appraisal tool should be used to document the performance appraisal interview. Outcomes and future goals should be mutually agreed to at the interview and signed by both parties, and an original copy filed in the personnel file. A copy should also be given to the staff member.

Poor performance process

- In the event of poor performance, discussions should be held with the relevant staff member in a timely manner, rather than waiting until the annual assessment. Appropriate documentation of the discussion should be kept and a witness involved if required. It is generally appropriate to offer the staff member the right to have a support person at the meeting.

Appraisal records

- A record should be kept of annual appraisals and competency assessments in a staff development register.