Briefing Paper 1: MyPerformance MyCareer - online system

History of development of the online template

Over the past two years, consultation with leaders, managers and staff including key feedback from the focus groups has assisted the design of the online system.

- The workplanning process within RMIT comprises of Planning and Objective Setting, Mid-Year Review and Year-End Review this remains the same and aligns to the annual University planning cycle.
- The basic structure of the template includes important components of objective setting, KPI comments, appraisal and development. The structure of the template does mirror in part the existing workplanning forms in some aspects. Some variance does occur in the design to align to specific academic, TAFE, professional and executive requirements. The inclusion of the online Behavioural Capability Framework is an important change.
- The system has been built to include appraisal scales which will not be mandatory in 2012, but creates the expectation that RMIT will progress and use effectively appraisal scales within the next couple of years.

Some issues and concerns raised have been addressed by the following:

1. *Keep the process simplified as much as possible*
   - The online template will provide a quicker alternative and more effective system by streamlining preparation and form completion. Many managers deal with lengthy descriptive workplans. The template and training will encourage staff and managers to produce more succinct references to record conversation.
   - There are plenty of opportunities for comment, but also options to select ‘quick’ drop down appraisal scales at end of year. Expectation around input of comments ie mid year is not onerous with only two fields to be filled out by the manager and staff member to update on progress.
   - The ability to track the status of each workplan is an important benefit for managers.
   - Each change to the template is recorded, and ESS will alert manager or prompt around any outstanding actions.

2. *I do not want the system to dictate what I do*

   No fields in the system are mandatory (including mid year review) except signatory sign off that a discussion has taken place at objective setting and end of year review. Staff may include as much or as little as they want especially in the first year. Training will assist with good practice with the form. RMIT is a large organisation and the goal has always been to accommodate as many needs as possible – as a result the system is flexible.
3. **Concerns about privacy**

Organisational reporting is kept to a minimal level and is focussed on status reporting to track how staff are progressing through planning, mid year and end of year cycles. A concern is the privacy of staff records. The University will not be able to organisationally report or provide summaries on personal feedback/ comments between staff member and manager to maintain that confidentiality. There will be tight requirements on who can access information. Communication of privacy protocols will be widely circulated, as compliant with the provisions of the *Information Privacy Act 2000* (VIC).

4. **Criticism of 'compliance overload' – proliferation of questions not related to performance but are basic University responsibilities of all staff**

An enhancement in functionality is the ability to create organisational and also team based cascaded objectives. In order to simplify the template there has been an attempt to remove the ‘overload’ of references to non-performance based questions. The use of cascading objectives will still create flexibility to include compliance based objectives but these requirements are not hard wired into the template and can change from year to year.

5. **Absence and lack of clarity how to effectively use value statements in discussions**

The development of the Behavioural Capability Framework is in direct response to University feedback from staff and managers to create a behavioural based reference that provides greater description and guidance. This Framework will replace the reference to the University values, and provide more detail for staff and managers to consider. Training planned for later this year will provide all managers with the chance to practice behavioural feedback and expectations using RMIT’s documents.

6. **The lack of history of workplanning as an employment record**

Ability of staff and managers to view previous workplans and create a personal history and career reference for staff with the on-line system. Objectives and development needs, career aspirations are able to be copied from one year to the other.

7. **Academic template not fully aligned with career promotion**

Academic descriptors in workplan revised and aligned to academic promotion criteria. Development plan removed and career plan revised. Merging of the objectives section to include development activities as part of normal teaching practice and research work. References to ‘performance indicators’ retained in TAFE and Professional Staff workplans but ‘indicator’ references changed in Academic workplan to create further flexibility in how the form is interpreted and completed.

8. **Keeping it ‘alive’ a living record of discussion and work status**

Ability to take notes and provide an update to your workplan as objectives, or development needs are completed during the course of the year.
9. **Leave management and planning is difficult**

   There is more visibility with leave with up to date balances visible in the template.

10. **Leave in ESS is cumbersome and concern of SAP being used for on-line performance**

    With the recent upgrade of SAP - several related projects are underway. Relaunch and improve MSS, review of appraiser reporting lines, partnership with ITS in relation to security protocols, attachments and user ability considerations.