



Performance Planning and Review (Performance Partnering) Policy

Purpose

The purpose of this policy is to set out the principles that apply to the planning and review of staff performance, and the requirements of managers and staff in relation to these. This is necessary to ensure that the planning and review of performance is carried out in a consistent, transparent and equitable manner. It is also necessary to ensure the ongoing alignment of staff performance and capability with the needs of the individual, their team and Unitec as a whole.

This policy is not intended to address the management of performance issues ie. where the standards of performance, behaviour and compliance are not met by staff, as this is already covered by existing Disciplinary & Performance Management Policy.

Scope

This is a Unitec wide policy and applies to all permanent staff, and all fixed term staff who have been contracted for a cumulative period of 12 months or more.

This policy does not apply to fixed term staff who have been contracted for a cumulative period of less than 12 months, casual or hourly paid staff, or to independent contractors engaged on a contract for service, or the employees of contractors.

Policy Statement(s)

1. Principles

- **Based on the values of Te Noho Kotahitanga** – Unitec intends that all performance planning and review conversations, activities and processes are guided by the values of Te Noho Kotahitanga
- **Accountability** - Unitec supports and encourages all staff to take ownership of, and responsibility for their performance and development, supported by their manager.
- **Partnership** – Unitec intends that performance planning and review conversations are based on a partnership model, where the conversation is two-way, and goals and achievements are discussed, agreed and signed off by both the staff member and their manager.
- **Consistency** – Unitec's approach to performance planning and review is consistently applied across all areas of Unitec
- **Alignment** – Unitec's approach focuses on ensuring alignment of performance and development goals from the individual level through to the team and organisational level

2. The Performance Partnering Framework

- The Performance Partnering Framework is Unitec's mechanism for performance planning and review. It sets out the annual cycle of activity relating to the planning and review of performance and comprises four elements:

a. Alignment of Team Purpose

- Unitec purpose and strategic priorities are reviewed and reset by the Executive Leadership Team for the beginning of each calendar year. The Executive Leadership Team set their action plan for the year based on this.
- Leadership teams across Unitec, led by the Heads of Schools/Directors, review and reset their purpose, priorities and team action plans for the beginning of each calendar year, to align with the Unitec purpose and priorities as set by the ELT.

b. Development of Individual Plans

- Every staff member to whom this policy applies is required to have an annual Individual Plan in place that includes:
 - Individual goals for the year, aligned to team goals and Unitec strategic priorities
 - Development needs and professional development goals aligned to Unitec-wide development priorities and competencies
 - Consideration of the factors that are critical to ongoing enjoyment of the staff member's role and sustainability of performance
 - Consideration of how they will partner with their manager and across Unitec to achieve their goals in a manner aligned with the values of Te Noho Kotahitanga
- The individual plan must be agreed and signed off by both the staff member and their people manager.

c. Regular Performance Conversations

- All staff are expected to meet with their people manager regularly throughout the year, and at a minimum every 90 days, to review progress against the Individual Plan, recognise achievements and review or update goals as necessary. This is also an opportunity for ongoing feedback and regular coaching to assist performance and development.

d. Review of Achievements

- Every staff member to whom this policy applies is required to undertake an annual Review of Achievements that includes:
 - An evaluation of achievements against the individual and development goals set in the Individual Plan
 - An evaluation as to how effectively the staff member has demonstrated the values of Te Noho Kotahitanga in partnering with others
 - Assigning an overall level of achievement based on set criteria against the goals set in the Individual Plan
- The Review of Achievements must be agreed and signed off by both the staff member and their people manager.

3. Link to Remuneration

- The Review of Achievements will be one of the factors taken into consideration by Unitec management as part of the annual remuneration review and promotions processes. This does not in any way guarantee any remuneration increase or promotion as there are many factors contributing to this.
- There is an endorsement/calibration process in place to ensure the robust, consistent application of levels of evaluation across the Review of Achievements process.

Associated Procedures

Detailed procedures and guidelines are accessible on the Performance Partnering Portal

Responsibilities

Role	Responsibilities
Executive Leadership Team	<ul style="list-style-type: none"> • Review and reset Unitec purpose, strategic priorities and ELT action plan for the beginning of each calendar year, and communicate this out to the organisation
Head of School/Director	<ul style="list-style-type: none"> • Lead the review and reset of team purpose, priorities and action plan/s at the beginning of each calendar year to align with Unitec purpose, strategic priorities and action plan as set by the ELT • Ensure their teams are engaged and fully briefed on the reset of team purpose, priorities and action plan/s • Ensure all staff in their team understand and meet Unitec's performance planning and review (performance partnering) requirements • Take part in an endorsement/calibration process annually as part of the Review of Achievements to confirm levels of evaluation across their team
People Manager	<ul style="list-style-type: none"> • Contribute to the review and reset of team purpose, priorities and action plan/s at the beginning of each calendar year • Ensure all of their direct reports understand and meet Unitec's performance planning and review (performance partnering) requirements • Agree and sign off on Individual Plans for their direct reports in accordance with set timeframes • Meet regularly (every 90 days at a minimum) for performance conversations with each of their direct reports • Agree and sign off on the Review of Achievements for their direct reports in accordance with set timeframes • Take part in a calibration process annually as part of the Review of Achievements process to confirm levels of evaluation for their team members

Role	Responsibilities
Staff to whom this policy applies	<ul style="list-style-type: none"> • Develop their annual Individual Plan and work with their people manager to agree and sign this off in accordance with set timeframes • Work throughout the year to achieve the individual and development goals set in their Individual Plan • Meet regularly (every 90 days at a minimum) for a performance conversation with their people manager • Draft their annual Review of Achievements and work with their people manager to agree and sign this off in accordance with set timeframes
HR Business Partners	<ul style="list-style-type: none"> • Support leaders, people managers and staff to meet their performance planning and review (performance partnering) requirements
Learning & Development / HR Services	<ul style="list-style-type: none"> • Continuous improvement of the performance planning and review (performance partnering) process • Regular reporting to the Executive and Extended Leadership Teams on completion of performance planning and review (performance partnering) requirements

Definitions

Term	Means
Endorsement/Calibration	As part of the Review of Achievements process, endorsement/calibration is the process by which assigned levels of evaluation are reviewed to ensure they are being applied consistently across teams and across the organisation as a whole
Performance Partnering	<p>The Performance Partnering Framework is Unitec's mechanism for performance planning and review. It sets out the annual cycle of activity relating to the planning and review of performance and comprises four elements:</p> <ol style="list-style-type: none"> 1. Alignment of Team Purpose 2. Development of Individual Plans 3. Regular Performance Conversations 4. Review of Achievements
Individual Plan	<p>Also known as the ADEP Plan, the individual plan is an annual performance plan that sets out for each staff member:</p> <ul style="list-style-type: none"> • Individual goals for the year – what the staff member is going to achieve • Development needs & development goals for the year • Consideration of the factors critical to enjoyment of their role and the sustainability of performance • How they will partner with others to achieve their goals, demonstrating the values of Te Noho Kotahitanga
Review of Achievements	The annual process of reviewing individual achievements against the goals set in the Individual Plan

Reference Documents

- [Performance Partnering Portal \(all related procedures, guidelines, templates\)](#)
- [Disciplinary and Performance Management Policy](#)
- [Disciplinary and Performance Management Procedures](#)

Approval Details

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Consultation Scope (if appropriate)	Key stakeholders consulted in the review of this policy: <ul style="list-style-type: none"> • All Unitec staff 		
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Policy Sponsor (Has authority to approve minor amendments)	Executive Director – People & Infrastructure	Policy Owner	Human Resources
Contact Person	Learning & Development Lead	Date of Next Review	October 2023