

Performance Partnering Guide & FAQs



Foreword

Performance conversations are not new at Unitec. People are already involved in establishing agreed expectations and priorities with their manager and have regular catch-ups to discuss progress and get support.

From early 2017, the Unitec Performance Partnering framework has guided these conversations, and created a consistent approach to the way we talk about performance and capability.

Performance Partnering ensures everyone can see how the work they do makes an important contribution to the achievement of our purpose as stated in our strategy [Manaakitia te Rito](#):

Led by Te Noho Kotahitanga we manaaki the success of our learners and communities

It provides the tools to set individual goals for the year ahead, with regular check-ins every 90 days or at the end of a semester, allowing for changes in the plan as the year unfolds.

Through our commitment to Performance Partnering we can all move confidently together to make lives better through teaching and learning, and use our values to guide our thinking, decision making and actions.

He kai kei aku ringa.

There is food at the end of my hands.

Introduction

How to use this guide

This guide gives an overview of the Performance Partnering process and the resources available to support you.

If this is the first time you have worked through the process, we recommend you check out the links to tools and information as you complete each stage.

Who is the guide for

This guide is for everyone involved in the Performance Partnering process with tools for people leaders and individuals.

Where to go for more information

Check out the Performance Partnering portal for resources to support your development:

performancepartnering.unitec.ac.nz

Contents

Our Story

Unitec Performance Partnering

The Unitec Takitahi

Step 1: Align Team Priorities

- People leader information and team briefing session guide
- Team member information

Step 2: Create an Individual Plan

- How to complete the ACHIEVE section
- How to complete the DEVELOP section
- How to complete the ENJOY section
- How to complete the PARTNER section
- Preparing for your ADEP Align Conversation
- The Align conversation

Step 3: Partnering Conversations

Step 4: Review Achievements

FAQs

Manaakitia te Rito

Manaakitia te Rito, our three-year Renewal Strategy which launched in 2019, puts students and communities at the heart of what we do.

The foundation of our Renewal Strategy is our commitment to Te Noho Kotahitanga, the partnership and principles which express our commitment to Te Tiriti o Waitangi and underpin the values and kaupapa of our organisation.

Unitec's focus on successful renewal will not only manaaki the success of our learners and our wider communities but also strengthen us as we navigate upcoming sector change and better understand what it means for all of us.

Our Purpose



Unitec Performance Partnering

Performance Partnering is a way to help us to set plans and communicate them so that everyone can access and understand our Unitec priorities and take aligned action.

Why we have introduced Performance Partnering

To achieve Our Purpose we need new ways to connect and align our individual efforts.

Meaningful performance conversations are worth doing – they give us clear direction and support us in lifting and sustaining our performance.

How does Performance Partnering work?

Once established, we will work through each step within these time frames.



Performance Partnering involves all of these elements:



ALIGN TEAM*priorities*

Translating the organisational performance targets into team priorities to make sure you are contributing to achieving our Unitec Purpose.



CREATE AN *individual plan*

Finding your way for the year ahead by defining the important goals you want to **achieve**; the competencies, knowledge and capabilities you want to **develop**; what makes work **enjoyable** for you; and how you will use the values as a guide to **partner** with others.



PARTNERING *conversations*

Having regular two-way check-ins to provide an opportunity to recognise learning and success.



REVIEW *achievements*

Closing the loop by recognising learning and achievements against your ADEP plan.

MAHI KOTAHITANGA Heading in a shared direction

Imagine you wanted to sail across the sea. You would know where you wanted to go, but there would be many things about the journey that would be unknown. You would want to be sure you had the navigational aids to help you get to your planned destination.

The **Takitahi weave** has been developed as a woven representation of the Unitec Renewal Strategy to help us navigate us on our journey towards realising our Purpose.

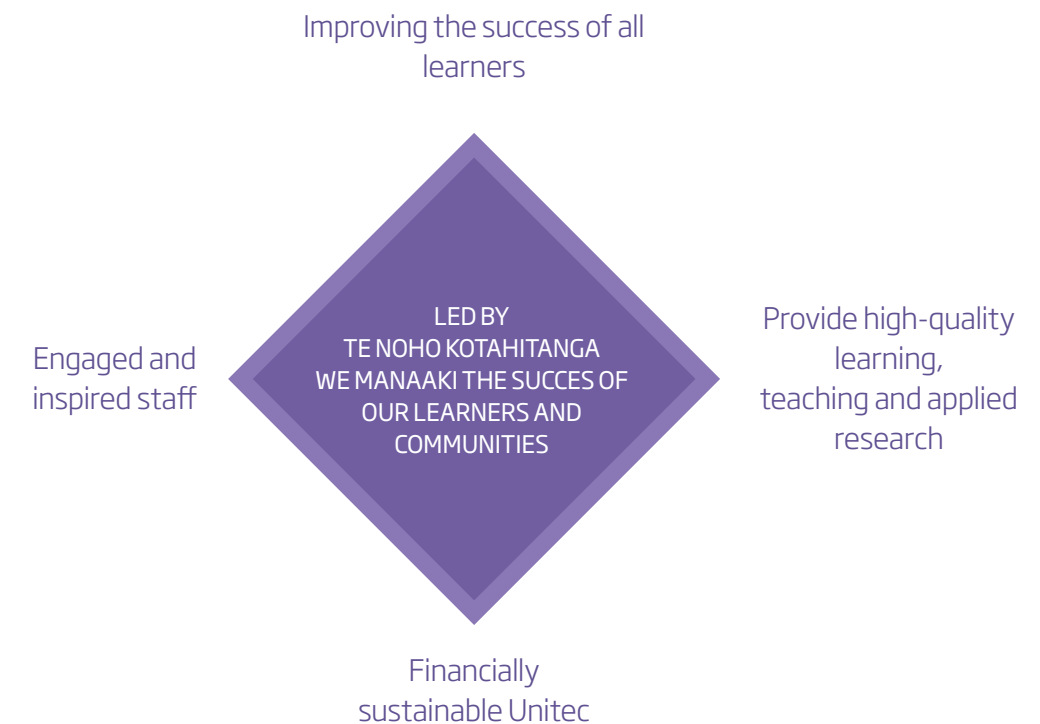
By first weaving over one strand, then the other strand, Takitahi represents synergy, cohesion and strength. Each and every strand - and each of our values and goals - needs to be woven together in unity to create the weave.

He waka eke noa

We are all on the same waka contributing to the success of our students and our organisation.

The Unitec Takitahi

Each year the Unitec Executive Team check our progress, reset our course and make the strategic priorities for the year ahead available for everyone in the [Unitec Takitahi](#). The Unitec Takitahi is an important guide for the course you will chart with your own teams, through your own [Team Takatahi](#)



Step 1: Align Team Priorities



The **Team Takitahi** is a visual tool that shows very clearly what is important and why.

IF YOU MANAGE A TEAM

You can use the Team Takitahi to align your team and keep everyone moving confidently forwards.

A Team Takitahi makes it easy to understand the team's purpose and priorities for the year, builds unity within the team, enables clear communication and improves your ability to respond to change.

Building your Team Takitahi is best done using the Unitec Takitahi as a starting point and the relevant annual business plan (Network, Practice Pathway group, or service group).

Completing your Team Takitahi may take a few meetings to refine and polish. When complete, it shows how the team uniquely contributes to the Unitec Aspiration (think of this as the purpose or the core reason for your team) and the top four or five priorities for the year ahead.

This information helps everyone see how they can personally contribute.

For more detailed instructions on how to complete your Team Takitahi, [click here](#). For the Team Takitahi Template, [click here](#).

TEAM BRIEFING

Sharing your Team Takitahi with the people interested in your focus for the coming year – including your Executive Team member and the wider team – helps to ensure everyone is working together.

You will want to share the Team Takitahi across the broader team early, so it can be used to help inform the development of individual plans.

Once you have worked together to create your Team Takitahi and shared this with your wider team, you'll be ready to craft your individual ADEP plan.

Step 1: Align Team Priorities



A Team Takitahi makes it easy to understand the team's purpose and priorities for the year, builds unity within the team, enables clear communication and improves your ability to respond to change.

AS A TEAM MEMBER

You can use the Team Takitahi to align your individual efforts to the purpose and priorities of the team.

Once you have attended a Team Takitahi Briefing you'll be ready to craft your Individual ADEP Plan.



Step 2: Create an Individual Plan

Like a map for a long journey that breaks your trip into all the different cities you plan to visit on your way to your destination, an Individual ADEP plan summarises the big focus areas for the year.

The elements of the Individual ADEP Plan are:

- **ACHIEVE:**
Based on your team's performance targets and priorities set your individual goals for the year ahead.
- **DEVELOP:**
The skills, knowledge and capabilities you need to develop as agreed with your people leader.
- **ENJOY:**
A summary of what makes work enjoyable for you.
- **PARTNER:**
How you will use the values as a guide to partner with others.

For the Individual ADEP Plan Template [click here](#).



Step 2: Create an Individual Plan

ACHIEVE

Rather than a detailed list of everything you will undertake, the ACHIEVE section of your ADEP Plan is where you record your top four individual goals for the year.



Why is this important?

The ACHIEVE section of your Individual ADEP Plan helps define your most important focus areas and ensures your work is aligned with your team priorities.

For more detailed instructions on how to complete your ACHIEVE section and set SMARTA individual goals [click here](#). SMARTA goals are: Specific, Measurable, Achievable, Relevant, Timed and Agreed.

DEVELOP

Your development is a priority. We all need to explore and adopt new approaches to teaching and learning, and in order to achieve all our measures of success we will each need to be committed to our own development.



To define your development priorities, use the 70:20:10 principle. That means about 70% of your development will come from the work you do; partnering and mentoring with peers and others will account for about 20%, and the remainder will come from more formal development (completing qualifications, courses, etc).

Start with your current role and your ACHIEVE goals and also consider your career goals and future aspirations. Think about how you prefer to learn; the opportunities in your role; projects that would help you to acquire new knowledge and skills and people who can support your development. Then consider the opportunities available for more formal development.

For more information, go to [Create an Individual Plan](#)

For further information about Professional Development @ Unitec and our inhouse offerings, [click here](#).

Step 2: Create an Individual Plan

PREPARING FOR YOUR ADEP ALIGN CONVERSATION

Before having an ADEP Align conversation with your people leader, take a few minutes to complete the ACHIEVE and DEVELOP sections in your Individual ADEP Template. To access the Individual ADEP Plan template [click here](#).

You will also need to jot down your thoughts in the ENJOY and PARTNER sections:

Use the [Enjoy](#) and [Partner](#) sections of the [ADEP Plan guidelines](#) to consider what makes work and the workplace enjoyable for you and how you will use the values to partner with others.

Now you are ready to talk through your draft Individual ADEP plan to make sure it is aligned to the team priorities.



Step 2: Create an Individual Plan

ALIGN CONVERSATION

The Align Conversation

The purpose of an Align conversation is to understand each other's drivers and expectations. During the Align conversation goals are agreed. This conversation creates a framework for your future partnering.

Why is this important?

When people understand what's important to each other and clarify expectations, they develop higher levels of trust. This sets the foundation for a relationship that is more likely to strengthen when under pressure, rather than to drift apart or fracture.

The Conversation

The best Align Conversations are two-way, and they help to get issues out in the open. Here are three ways to be ready for the conversation.

1. Jot your thoughts down before you meet
2. Expect to have some differences of viewpoint
3. Treat it as two colleagues trying to set each other up to Achieve, Develop, Enjoy and Partner for success.

Use these prompts to make your first conversation successful:

- Actively listen to each other's views
- Find common ground and explore differences
- Write your agreements into the Individual ADEP Plan
- Aim for four to six SMARTA individual goals that will support you to achieve the team priorities. .

How to have an ALIGN Conversation

Use the Align Conversation tips as a guide for your discussion. Finalise your plan and agree on your focus for the next period with your people leader. Submit your completed signed off plan to People & Safety by uploading it to PeopleSoft through Staff Self Service - [click here](#) for instructions.

Set up Regular Check-ins

Regular check-ins will ideally happen every 90 days, however, every role and team will have its own business cycle and this will help you to define the best timing for you to catch up and revisit the plan.

Step 3: Partnering Conversations

PARTNERING CHECK-INS

Check-in conversations occur on a regular basis to recognise learning and success, and realign or sharpen expectations.

In a busy and changeable environment, it is important to share expectations and to have frequent and open conversations so these stay aligned. This sets you up for success and minimises the risks of misunderstandings and wasted effort.

STAYING ALIGNED

The key to sustaining a strong collaborative relationship is to schedule regular times to discuss what is working well and what needs to change.



Step 4: Review Achievements

REVIEW ACHIEVEMENTS

The final step in our annual cycle is the Review.

A review conversation is an important way to close the loop and celebrate all your accomplishments.

It is an opportunity to reflect on your progress against your Individual ADEP Plan:

- What goals did you ACHIEVE?
- What skills, knowledge and capabilities did you DEVELOP?
- What made work ENJOYABLE for you?
- How did you use the values to PARTNER with others?

For more information and templates about the **Review process** [click here](#) to access:

- Review of Achievements Template
- Review of Achievements Guidelines
- Review of Achievements Checklist for Completion
- Instructions for Team Members Submitting Your Review Form
- Instructions for Managers: Viewing Team Review Forms



FAQs

1. What is Performance Partnering?

- » A four-step process to enable us to set individual plans that are aligned with organisational performance targets, identify individual development needs, regularly connect to ensure progress is on track, and review achievements.

2. Why do we need Performance Partnering?

- » The process will provide a consistent approach and common language for talking about performance and development. It will enable staff to be clear about expectations; to understand how they contribute to broader organisational goals, stay current and enable more targeted development; and to ensure regular feedback and support to achieve individual, team and organisational goals.

3. Who should participate in Performance Partnering? Is everyone at Unitec required to participate?

- » The expectation is that all staff employed for at least 12 months will engage in Performance Partnering.

4. What's the process for new employees joining mid-way through the year?

- » If a new employee is starting prior to 1 October, the expectation would be that they would work with their manager to agree their ADEP plan and then agree regular times to meet for check-in conversations throughout the remainder of the year. Employees starting after 1 October in any given year are not required to submit an ADEP plan for that year; instead, they are encouraged to familiarise themselves with the Performance Partnering process in preparation for the following year.

5. Is Performance Partnering our performance management process?

- » Yes, however, if performance concerns or misconduct is identified during this process, it is expected that these will be managed outside of this process with HR support as required.

FAQs

6. How do I deal with performance issues?

- » Performance issues should be addressed if and when they arise, not held over for discussion at check-in conversations.

7. How does this process link to other Unitec processes (e.g., Senior Lecturer Promotion, Early Childhood Education portfolio, etc.) so as to avoid unnecessarily duplicating efforts?

- » These processes are not currently linked, however where there is an opportunity to record development progress or capture achievements as an input to other processes this should be incorporated.

8. How does this process apply to staff who are on collective agreements?

- » The Performance Partnering process applies to all Unitec employees who are employed for at least 12 months; it is consistent with and complementary to our collective agreements.

9. How do we treat industry professionals/contractors?

- » They will have performance targets set and reviewed as part of their contract.

10. How often should we be having check-in conversations? Is there flexibility around the timing?

- » Check-in conversations are intended to be held roughly every 90 days. However, it is acknowledged that the frequency of conversations may be different and the performance partnering cycle may be longer or shorter for different parts of the business. Of course, you are encouraged to meet more frequently if it makes sense to do so.

11. How will my performance be assessed?

- » The Review of Achievements will involve a review of all four components of the ADEP plan; you will be assessed on the achievement of your objectives (the A of ADEP) and the demonstration of values in your partnering with others (the P of ADEP).

FAQs

12. How is Te Noho Kotahitanga reflected or incorporated in the Performance Partnering process?

- » The five values of Te Noho Kotahitanga are implicit in everything we do at Unitec and underpin the way that we partner with others and make decisions. The way that values are demonstrated through behaviour should be a key consideration in setting goals and having conversations around partnering. The Review of Achievements will also include an evaluation of how effectively you have demonstrated the values in partnering with others.

13. Does Performance Partnering impact my remuneration or bonuses?

- » Performance Partnering focuses on enhancing communication and clarity within your role, building on individual and team performance, and supporting staff development that is aligned with organisational and team priorities. Staff remuneration packages are part of a separate process that occurs at a different time of year. The outcomes of Performance Partnering will assist as one of the considerations in the salary and bonus processes as applicable.

14. Where do I find tools, resources and templates?

- » All tools, resources and templates can be found at the Performance Partnering Portal (performancepartnering.unitec.ac.nz).

15. Where do I find information on development activities?

- » Check the Professional Development page on the Nest - (Home > Working @ Unitec > Professional Development) - for current internal offerings. You and your manager can work together to identify other development opportunities, keeping in mind that development should be about much more than formal training.

16. Where do I find information on my team takitahi?

- » Your manager should have shared this with your team through workshops or briefings early in the year. If not, check with your manager.

FAQs

17. Who is involved in the development of team takitahi?

- » This will vary; areas of the organisation will approach this in different ways. Typically, for any given team, you would expect the leaders of that team to drive this activity

18. How many goals should I have?

- » 4-6 individual SMARTA goals are the ideal (SMARTA = specific, measurable, achievable, relevant, timed, agreed). It is particularly important that your goals are clearly measurable.

19. What happens if my manager changes during the year?

- » We would expect that your new manager would meet with you and you would share your ADEP plan and then pick up the ongoing check-in conversations in line with the agreed operating rhythm.

20. What happens if my manager and I don't agree on any aspect of my ADEP plan?

- » Partnering should be key to the conversations you have, and we would expect most differences of opinion to be worked through in this way.

21. What do I do if my manager is not engaging in Performance Partnering?

- » In the first instance, you should approach your manager directly and seek to understand what the barriers are and try to work through these. If this is not successful and they still are not engaging in the process, you can escalate this to your manager's manager if you have concerns.

22. Who is responsible for scheduling performance conversations?

- » When you agree your ADEP plan, you should agree how you will partner with your manager, including who will set up check-in conversations.

FAQs

23. Who is responsible for capturing the key points of performance conversations?

- » At the beginning of the year, you will need to document what is agreed into your ADEP plan, and you should take responsibility for capturing the key points and getting these signed off by your manager. Any changes to your ADEP plan agreed with your manager in the course of check-in conversations will also need to be captured.

24. Who has access to my ADEP plan and where is it stored?

- » Once your ADEP plan is agreed at the beginning of the year, you will need to submit a copy of this to People & Safety by uploading it to PeopleSoft through Staff Self Service - [click here for instructions](#) on how to do this. You and your manager will also be able to view and access a complete record of all ADEP plans you have submitted at any time - this means you can always access an up-to-date copy for your review in your check-in conversations. In addition to you and your manager, your ADEP plan will be accessible to People & Safety.

25. How do I record and submit my Review of achievements?

- » You will need to record the key points of your review conversation with your manager using the Review Achievements Form; once it has been completed you and your manager will need to sign this document and your manager will submit it to the next part of the process which involves endorsement and confirmation by the leadership team for your area and by the Executive more broadly. Once confirmed, your manager will return the completed, endorsed form to you, and you will need to submit it to People & Safety by uploading it to PeopleSoft through Staff Self Service - [click here for instructions](#).

26. How is third party feedback considered?

- » Your manager is encouraged to seek feedback from several people you have worked with and elicit feedback from them around your strengths and development areas. This will provide several viewpoints on your performance. You as an individual are encouraged to provide examples of how you've partnered with others and worked with others to achieve your objectives.

27. What happens if I don't agree with my manager's evaluation of my overall level of achievement?

- » You should raise your concerns with your manager, with supporting reasons and data if available. You also have the opportunity to raise it with your manager's manager who in most cases will also be part of the endorsement process. The ultimate decision will rest with the leadership group for your area.

28. Where can I go if I have questions or need support?

- » The Performance Partnering portal (performancepartnering.unitec.ac.nz) should be your first port of call. If you still have questions, talk to your manager.



Unitec
Institute of Technology
TE WHARE WĀNANGA O WAIRAKA