



Department of **Education**

## Questions and Answers – Employee Performance

June 2016

### **BACKGROUND**

*These questions and answers contain information on performance management and development processes used by the Department of Education and should be read in conjunction with the Employee Performance policy and procedures, the relevant Industrial Instrument and the Performance Management Standard.*

#### **1. What does the Employee Performance policy cover?**

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The Employee Performance policy and procedures apply to all employees and cover all aspects of employee performance, including substandard performance.

Guidelines are included to assist employees and line managers in the application of an effective performance management process (Appendix A - GOOD PRACTICE IN PERFORMANCE MANAGEMENT).

Procedures for principals are included.

Procedures for teachers align to the Australian Teacher Performance and Development Framework and the Australian Professional Standards for Teachers.

Procedures for substandard performance provide detailed information for both employees and line managers about the process and its application.

#### **2. How is the Employee Performance policy supported?**

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Support resources are available for all employees and line managers on both the HRM Web and Workforce website – see Employee Performance policy.

Further information is available from:

- Workforce Policy and Coordination Directorate (9264 5155) for assistance in implementing the policy or accessing resources

- Labour Relations (9264 5126) for assistance in dealing with unsatisfactory performance
- Standards and Integrity Directorate (9264 4740) for assistance with discipline-related enquiries.

Registration for workshops for school leaders addressing the *Australian Professional Standards for Teachers*, building a performance culture, classroom observation and effective feedback for teachers may be booked through [PLIS](#).

Up to two days of funded professional learning tailored to the needs of school leadership teams, in relation to effective performance management, can be delivered at schools. Contact [Paul.Heenan@education.wa.edu.au](mailto:Paul.Heenan@education.wa.edu.au)

Support materials, including FAQs and a performance management template for teachers, are available on the performance management page of the [HRM Web](#).

### **3. What is performance management?**

Performance management is a collaborative process that links Departmental objectives with individual performance, clarifies job expectations and supports employees to be more effective in their role. It is an opportunity for growth and development where an employee can reflect on their career goals and appropriate professional development can be identified. Performance management provides an opportunity to reflect on and improve work practices and processes.

### **4. How can an employee prepare for a performance management meeting?**

The performance management and development process should be viewed as an opportunity to further an employee's career aspirations as well as to clarify job expectations.

To ensure that the employee gains the most out of the process, they should be encouraged to prepare for their performance management meeting by reflecting on their current understanding of their role and work priorities, their work performance, achievement of outcomes and any barriers they may view as affecting their performance.

They should bring to the meeting evidence that demonstrates achievement of outcomes and delivery of performance at a satisfactory level.

Employees may also consider their medium and long-term career goals and be encouraged to identify developmental opportunities that may assist them in reaching those goals.

### **5. What makes an effective performance management meeting?**

A successful performance management process is a collaborative process in which the employee actively and positively participates. An effective performance management meeting enhances employee motivation and capacity by:

- providing greater role clarity around work expectations and priorities
- providing constructive feedback on performance outcomes
- identifying areas of strength and those that require improvement
- selecting support and development to enable employees to achieve identified improvement goals
- demonstrating a clear alignment between individual performance with the key goals and strategic objectives of the Department and school
- discussing career aspirations
- giving appropriate recognition.

## **6. Why is substandard performance part of the same suite of information as performance management?**

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Employee performance may be placed on a continuum from excellent through to substandard. The policy and procedures reflect this.

The policy and procedures facilitate management and development of the full spectrum of employee performance.

## **7. Is performance management compulsory?**

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Yes. Performance management in the public sector is required by legislation, specifically sections 9(a) and 29(i) of the Public Sector Management Act 1994.

The Performance Management Standard also requires that:

*“The performance of all employees is fairly assessed to achieve the work-related requirements of the public sector body while paying proper regard to employee interests.”*

As the Performance Management Standard applies to the performance management of all employees in the public sector, all employees in the Department of Education, regardless of their roles or levels, must participate in a performance management process.

## **8. Does the policy apply to all staff?**

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Yes. The Employee Performance policy applies to all categories of staff employed by the Department, as identified by section 235(1) of the School Education Act 1999 (the SE Act).

In addition to the policy, section 239 of the SE Act imports section 79 of the Public Sector Management Act 1994 (the PSM Act) for members of the teaching staff and other officers. As a result, section 79 of the PSM Act is the relevant legislation for public service officers, other officers and teaching staff.

Wages staff are not covered by section 79 of the PSM Act and are subject to what is referred to as ‘common law’.

The *Employee Performance* policy is consistent with requirements of the *Performance Management Standard*.

## **9. What is meant by “proper assessment” according to the *Performance Management Standard*?**

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The *Performance Management Standard* provides a number of explanatory notes as a guide. These should be considered as ancillary to the Standard and not part of the Standard itself.

The Standard requires that a proper assessment of an employee’s performance is to take into account both the work-related requirements of the job and identified employee interests.

However, the explanatory notes acknowledge that whilst the Standard requires the employing authority to identify employee interests, it does not oblige the employer to assent to them. They assist the employing authority to make an informed assessment about employee performance by taking such interests into consideration. Employee interests could include:

- career considerations
- professional development needs
- personal circumstances.

## **10. Is a formal performance management process required for staff on short-term contracts?**

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It is useful to maintain a record of performance even if a contract expires within one or two terms as the employee concerned may be re-employed or seek re-employment within the Department.

This record may not be a fully developed performance management process as this would not be feasible given the duration of the contract. Any record of an employee’s performance, including an employee on a short-term contract, must be communicated to the employee who should be able to make a response, should they wish to do so.

Copies of relevant documentation relating to short-term employees (as with permanent employees) must be retained by the line manager or worksite.

## **11. Are principals subject to a formal performance management process?**

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Yes. The *Principal Performance Review* process at 3.2, page five of the *Employee Performance Procedures* outlines expectations for all principals.

Appendix B and C of the *Employee Performance Procedures* provide further information.

## **12. Can an employee's performance be assessed in such a way that they are unaware of it?**

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No. The *Performance Management Standard* requires that employees are informed about how their performance is assessed and that this assessment is documented.

## **13. When should a performance management process start and finish?**

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This is at the discretion of the line manager. In most school-based situations, staff have an initial performance management planning meeting during Term 1. Review meetings are usually held some time towards the end of the school year. Variation to the duration and length of the cycle depends on particular school/worksite circumstances. Availability of student performance data may also be a factor in the timing of meetings.

## **14. How often should performance management meetings be scheduled?**

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As a minimum, all employees should participate in an annual performance management process with their line manager. At the conclusion of the cycle, managers should meet with their employees to discuss performance outcomes.

An annual review is a requirement for teachers, support staff and non-IPS principals.

The *Principal Performance Review* process at 3.2, page five of procedures outlines expectations for all principals. Further details are at Appendix B.

Various factors may influence the frequency of performance management meetings, including:

- previous performance management meeting outcomes
- any issues that impact on an employee's performance
- changes in line manager
- changes in an employee's role.

The performance and development process should include an annual planning meeting, where the employee's duties and goals for the coming year are discussed with them by their line manager. This discussion should identify professional learning and support. Any specific matters, such as deadlines or resources to be provided, should be discussed at this time with the employee.

In addition to formal performance management meetings, line managers should also provide regular and timely feedback to employees, plus guidance to them about their work, their careers and professional development. These discussions may be formal or informal in nature.

An annual review should be held to discuss how well the employee has achieved their goals.

See Appendix A of Employee Performance Procedures for a description of good practice.

### **15. When can formal performance management processes be scheduled for teachers?**

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Performance management is part of an individual's work. Performance management meetings may be held at various times, including outside the normal school day, during Duties Other Than Teaching (DOTT), during class time with teacher relief, through a combination of these options, or as otherwise agreed between the principal and the teacher(s). There is no priority or restrictions on when performance management may be conducted.

If a principal/line manager has any questions in regard to this, further advice can be obtained from Labour Relations (9264 5126).

### **16. Is classroom observation required for the performance management and development of teachers?**

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Yes. Line managers are required to observe and evaluate teachers' classroom practice and provide feedback.

The Employee Performance Procedures require that line managers: "use a variety of evidence in providing performance feedback that includes, **as a minimum**: data showing impact on student outcomes; **information based on direct observation of teaching**; and evidence of collaboration with colleagues."

The *Australian Teacher Performance and Development Framework* aligns to the *Australian Professional Standards for Teachers* and cites research that shows the impact of classroom observation on improving practice.

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Observation of this kind provides an opportunity for ongoing constructive feedback and determination of teachers' development needs. This can be carried out on a regular ongoing basis as a standard part of teachers' performance assessments; as part of their development plan; or as part of a substandard performance process.

It is prudent for principals to develop a performance culture in their schools before commencing classroom observations. See the Australian Teacher Performance and Development Framework

In the context of a performance culture, teachers should be advised that observations will be undertaken (it is not necessary to advise of exact times that observations are to occur – merely that they will occur over particular days or during a specific week).

### **17. Is peer observation required as part of the performance management process for teachers?**

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Peer observation, while not mandatory, can be an important tool for improving teaching. It is important that observation is part of a whole-school approach to

improving practice within a school's planned approach to performance and development.

Research shows observation of classroom teaching, linked to timely and constructive feedback that focuses on improvement, is a particularly useful tool for teacher development and is the most commonly used form of evidence across many economically developed countries.

While Principals and other school leaders have an important role to play in observation, teachers can also obtain great benefit from observing and being observed by their peers and receiving constructive feedback.

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***18. Where a line manager has concerns about the health of one of their staff members can they still require them to participate in performance management?***

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Performance management should be delayed if there are concerns about an employee's fitness for work due to potential or actual, physical or mental health issues. The process should resume when they are declared fit for work.

Similarly, if a staff member is part way through a process of being referred to the Department's Consultant Occupational Physician, or being assessed or treated by another medical practitioner or specialist, formal performance management should be delayed. During such a process a line manager can still require the employee to carry out their role to the best of their ability and to a satisfactory standard.

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***19. Will performance management be included in school audits and what will be audited?***

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Performance management is audited through self-assessments, annual monitoring through the Employee Perceptions Survey conducted by the Public Sector Commission and internal audits undertaken by the Audit and Risk Management Branch.

Line managers need to demonstrate that, for each employee under their supervision, there is supporting performance management documentation that is capable of review.

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***20. What will happen if a line manager does not implement a performance management process?***

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Where line managers do not implement performance management processes with their employees, they will be accountable to their superordinate.

In certain circumstances, extensions may be granted that accommodate the particular workplace context and role.

Employees who have not been given the opportunity to participate in a performance management process should raise the issue with their manager or superordinate.

**21. Who has responsibility for the performance management of school support staff?**

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Usually members of the school support staff are managed by the Registrar or Business Manager; however, it is ultimately the principal's decision to determine who is to have responsibility for performance management of school support staff.

**22. Who is able to access performance management documentation within a school environment?**

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Performance management and substandard performance processes are bound by confidentiality and documentation must be maintained in a secure location.

In a school environment, documentation can be accessed by the employee, the principal/line manager and superordinate.

Where there is a change of the principal/line manager through movement of the employee or change in supervision, the new principal/line manager may access performance management (and substandard performance) documentation held at the previous school or worksite.

Officers from Labour Relations (92645126) may access employee performance data when there is an organisational reason to do so.

An employee may provide performance management information to their support person or a union member if they so wish.

**23. When an employee moves from one workplace to another, what happens to the performance management documentation?**

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A line manager's copy of an employee's performance management documentation remains at the worksite where it was conducted. Employees are at liberty to take their own copies of previous performance management processes with them to their new workplace. Line managers/principals can access performance management documentation from the previous workplace.

Employees undergoing substandard performance management processes are not ordinarily permitted to transfer. If a movement, such as a transfer or temporary deployment, does occur or is required (for example in situations when a fixed-term position occupied by a permanent teacher comes to an end and the employee requires an alternative placement, or when a teacher is subject to redeployment), then all relevant documentation may be requested by the new principal/line manager.

**24. How should the employee's performance goals be determined for the Performance Management Plan?**

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The principal/line manager and the employee should work together to develop performance goals linked to the:

- employee's role and duties or relevant Job Description Form (if applicable)
- Departmental, school or workplace goals
- employee's current development needs
- professional learning to be undertaken.

The Employee Performance Procedures for teachers align to the *Australian Professional Standards for Teachers*.

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Principals, or their nominees, are required to:

- *"identify and document performance and development goals linked to the Standards, directed at developing each teacher's performance through building capacity, growing professional knowledge, and developing skills."*

See Appendix A for more details in developing goals and identifying support and professional learning.

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## ***25. Can an employee request an alternative principal/line manager for performance management?***

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Performance management is designed to take place between the employee and their principal/line manager who is best placed to guide and discuss the employee's specific role and responsibilities.

Where an employee has concerns about undertaking performance management with their principal/line manager, they must first discuss these concerns with their principal/line manager, who will then refer the matter to their superordinate.

The superordinate of the principal/line manager will consider the employee's concerns and determine if an alternative principal/line manager for performance management should be appointed. If a change of line management is agreed to, determination of the alternative line manager rests with the superordinate.

There is no requirement to accede to an employee's request to have a different line manager. The decision should be reasonable in the circumstances.

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## ***26. Will standards be taken into account in making judgements about whether an employee's performance is satisfactory?***

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Performance is considered within the context of the employee's role and responsibilities.

Judgements about performance standards will be made based on the outcomes of the role and the extent to which agreed performance goals are met within the context of the school or other workplace objectives.

Teachers should also refer to the industrial requirements on performance management as provided in clause 43 of the *School Education Act Employees' (Teachers and Administrators) General Agreement 2011*.

Comprehensive information on standards/competency frameworks and career pathways can be accessed at HRM Web.

Documents that provide a basis for discussion about performance standards include:

- *Australian Professional Standards for Teachers*
- *Level 3 Classroom Teacher competencies and assessment rubrics*
- *Australian Professional Standard for Principals*
- *Competency Framework for School Psychologists*
- *Competency Framework for Education Assistants (Special Needs) Practice and Learning*
- *Competency Framework for School Corporate Services Staff*.

## ***27. Should a performance management process take account of personal and career development needs?***

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The *Performance Management Standard* requires an employer to identify employee interests. Whilst the Standard does not compel employers to assent to them, it is important that staff have access to growth and development opportunities that allow for employee interests. These development opportunities need not be limited to the current role, but could take into consideration broader development opportunities that would support the individual employee's development. Employee interests include, but are not limited to:

- career considerations
- professional development needs
- personal circumstances.

## ***28. How long must performance management records be kept?***

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The retention and disposal of human resource management records in the Department must be in accordance with legislative requirements, as outlined in the *Records Management* policy.

Section 15 of the *General Disposal Authority for Human Resource Management Records* developed by the State Records Commission for the Government of Western Australia, identifies different periods required for records retention and disposal:

- performance management and substandard performance documentation (where no action is subsequently taken) to be retained for **five years**
- substandard performance where there is action taken to be retained for 71 years after employee's date of birth or 7 years after retirement, whichever is later, or 7 years after death.

### ***29. What performance management processes should be undertaken for employees having more than one line manager through working at multiple locations?***

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The line management of employees who work at different sites will vary depending upon the employee's role. Examples of this include:

- specialist music teachers may be line managed through the School of Instrumental Music;
- secondary music teachers employed directly by schools may be line managed by the school that has employed them;
- school psychologists located within a school but who also report to a professional manager;
- school chaplains employed by YouthCARE, which has overall line management responsibility through their YouthCARE Area Chaplains. Any issues with the chaplain's performance should be discussed with the YouthCARE Area Chaplain;

Teachers, support staff or other employees who work in a range of discrete, part-time positions at different locations may have a line manager at each of their part-time worksites. In this instance, a separate performance management process should be undertaken with each line manager. It is recommended that line managers of employees in situations like this consult or confer with the employee's other line manager(s), particularly at the time of carrying out a performance review.

In the instance of an employee working at multiple worksites with one line manager, only one performance management process is required. Where a line manager and professional manager are involved, discussion about how performance management will be undertaken should be made explicit.

The performance management processes will address the individual worksite's specific goals, objectives and requirements.

### ***30. Can principals/line managers outsource their performance management responsibilities to someone external to the Department?***

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No. Performance management cannot be outsourced to an individual or organisation external to the Department. It must be undertaken by the principal/line manager.

### ***31. How does performance management differ from discipline?***

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Performance management is the formal and informal continuous process of evaluating and supporting an employee's performance in the workplace. Performance management discussions and meetings are linked to school or workplace objectives and individual performance and development needs.

A discipline process is applicable where there is reason to suspect misconduct or a breach of governing legislation. Alleged breaches of discipline are investigated by the Standards and Integrity Directorate or referred back to a worksite for management at the local level. Where a breach is subsequently proven, disciplinary action may result.

### ***32. How do performance management processes and periods of probationary employment differ?***

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Performance management applies to all employees on an annual basis. Probationary employment relates to the initial period of each staff members' contract of employment with the Department.

Different probationary employment provisions apply to different categories of employees. Where a principal/line manager has concerns that a staff member is displaying poor conduct or performance, and they think the staff member may still be within their probationary period of employment, further advice and assistance should be sought from Labour Relations (9264 5126).

### ***33. What sources of feedback are available to principals on their performance?***

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Principals may seek feedback on their performance via:

- 360\* feedback, including staff, parent and School Council/Board surveys
- school performance data delivered via the School Performance Monitoring System.

### ***34. A staff member does not agree with their line manager's assessment of their performance – does the line manager have to amend their comments?***

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Ultimately it is the line manager (with sufficient evidence to support their view) who assesses the performance of their employees over the duration of a performance management cycle.

All performance management processes are subject to the *Performance Management Standard*. The Standard requires that decisions throughout the process are transparent, and capable of review. This includes reasonable consideration of any difference of opinion regarding achievement of goals or other assessment of performance.

### ***35. What action should a principal/line manager take when performance concerns have been identified?***

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Principals/line managers would, in the first instance, deal with any performance concerns using the process set out in the [Employee Performance Procedures](#), plus any parts of the relevant industrial instrument applicable to the employee concerned. This always includes, as a necessary step, formally discussing performance concerns with the employee and giving the employee an opportunity to respond.

If a principal/line manager requires further assistance, or the performance concern looks like escalating towards substandard performance, fitness for work, or potential misconduct (such as disobeying a lawful directive to attend a performance management meeting) advice should be sought from Labour Relations (9264 5126).

**36. Can a principal/line manager view an employee's previous performance management and substandard performance documentation?**

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Yes. Previous performance management and substandard performance documentation may be obtained and/or viewed by a current line manager upon request. The *Employee Performance* policy sets out that, where a change occurs (either by an employee moving to a different worksite, or a change in line management at the current worksite), the new line manager has the right to access previous documentation.

**37. Can performance management information be used as part of a recruitment process?**

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No. Performance management information is not intended to be used as part of a recruitment process. The use of referees would be a more appropriate source of information.

**38. What happens to an employee's Performance Management Plan if the employee leaves their position to take another role?**

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The performance management process should be applied in a flexible way that recognises that employees are deployed in different positions from time-to-time.

Where an employee is deployed on a temporary basis into another position, either through acting arrangements or temporary deployment at the same level, within the Department, their Performance Management Plan needs to be reviewed in the context of the new role, responsibilities and workplace goals.

**39. If an employee's principal/line manager leaves that position, does the new principal/ line manager take over the employee's performance management?**

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Yes. The new line manager should take over where the previous principal/line manager left off. This may require the previous line manager to document any comments related to their assessment of the employee, or otherwise be available for contact by the new line manager.

**40. What happens if an employee does not agree with the way they have been assessed, or the outcome of the performance management assessment?**

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Concerns about the outcome of the assessment should first be discussed and addressed with the employee's principal/line manager. This should provide clarification of issues related to the assessment outcomes. If, after further discussions and attempts to resolve any differences, the employee continues to

disagree with their line manager's assessment of their performance, the line manager's assessment will remain.

To lodge a grievance, the Department's Grievance Framework should be used.

Employees also have access to the breach of standard process, if they consider the *Performance Management Standard* has been breached.

#### ***41. If a principal/line manager regards an employee's performance as unsatisfactory, when should these issues be addressed?***

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Where an employee's performance is identified as not meeting the expected standard, principals/line managers, or their nominees, will:

- refer to the *Substandard Performance Procedures*
- raise performance concerns at the earliest opportunity with the employee through a formal performance management meeting, pointing out where they are failing to meet the requirements set out in the initial performance management plan
- provide support for employee to improve
- advise affected employee in writing of the aspects of their performance not meeting expected standards
- advise affected employee of the potential consequences, which may include a range of sanctions, including termination of their employment, should their performance be found substandard.

If, following assistance and a reasonable opportunity to improve, the employee fails to improve to the required standard of performance, the principal/line manager formally briefs their superordinate that the employee's performance may be substandard.

The superordinate may then request the Director General or delegate put the allegation of substandard performance, proposed investigation and possible consequences to the employee.

Should the Director General or delegate concur and authorise an investigation, concurrent with the investigation the employee is given a further opportunity to improve their performance to attain and sustain a satisfactory standard. This includes setting specific goals, timeframes and agreed support to assist the employee to meet the required performance standard.

The process for the management of substandard performance is described in the Substandard Performance procedures.

Advice can be obtained from Labour Relations (9264 5126).

#### ***42. What happens if an employee refuses to participate in performance management and/or substandard performance?***

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If an employee refuses to participate in performance management, the employee should be given a written formal direction to participate. Contact Labour Relations (9264 5126) for assistance if this situation arises.

Where an employee fails to comply with such a written direction, then the matter becomes a disciplinary issue and should be referred to the Standards and Integrity Directorate.

An employee is not obliged to participate in the investigation phase of the substandard performance process. However, in such a case, the employee should be advised that the process will continue without their participation and a decision made on the information available.

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***43. Do employees have specific time frames within which to respond during any investigation initiated by the Director General?***

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Yes. An employee has:

- 10 working days in which to admit or deny an allegation of substandard performance
- a further 10 working days to respond to the investigation report and any proposed sanctions.

Should there be specific circumstances that necessitate the employee to request more time, the request should be made in writing as soon as possible.

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***44. Is there a definitive performance improvement period in the Substandard Procedures?***

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The Substandard Procedures do not include a defined improvement period. Any period or degree of improvement is managed within the process outlined above, following the commencement of an investigation.

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***45. What happens if an employee does not respond to correspondence during a substandard performance process?***

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In the event that an employee chooses not to respond to correspondence during the substandard performance process, the process will continue unimpeded.

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***46. What happens in a substandard performance process if the employee goes on leave?***

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It is not advisable to approve any annual or long service leave or leave without pay applied for when an employee is progressing through a substandard performance process. This will likely have the effect of delaying or drawing out the process, to the detriment of all concerned.

The substandard performance process continues if a teacher or school support staff member proceeds on vacation leave. Should an employee going through a substandard performance process take personal or sick leave, supported by valid medical documentation, or lodges a workers' compensation claim, then the process may need to be stayed temporarily. If this were to occur, advice should be sought from Labour Relations (9264 5126).

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**47. How long does the investigation process take?**

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There is no set timeframe allocated to the investigation process. The time taken to complete an investigation will depend on the complexity and scope of issues involved.

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**48. What are the sanctions referred to in the Procedures?**

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In the case of Wages employees (not covered by s.79 of the *Public Sector Management Act 1994*), the sanctions available are either a reprimand or termination of employment.

For employees covered by the *Public Sector Management Act 1994*, Section 79(3) states that the employer can: "(a) withhold for such period as the employing authority thinks fit an increment of remuneration otherwise payable to that employee; (b) reduce the level of classification of that employee; or (c) terminate the employment in the Public Sector of that employee."

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**49. Can an employee request a support person to attend their performance management or substandard performance meeting?**

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Yes.

A support person may attend meetings as an observer only. They are not permitted to participate or represent the employee in discussions.

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**50. Who can act as an employee's support person?**

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There are no restrictions on who can be a support person for an employee.

The employee is able to choose a support person. Typically, such a person may be an Equal Opportunity Contact Officer, colleague, member of a professional association, a Union delegate/official, or a friend.

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**51. Is substandard performance and discipline managed within the same process?**

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Different processes are used for managing:

- performance that is substandard; and
- behaviour, or conduct, that constitutes a breach of discipline.

The line manager will need to determine whether the performance of the employee may be substandard or whether the employee's behaviour in carrying out their duties amounts to a potential breach of discipline.

Substandard performance is managed through the process detailed in the Substandard Performance procedures.

Examples that constitute a breach of discipline are provided in s.80 of the Public Sector Management Act 1994. In such circumstances the Staff Conduct and Discipline policy will apply.

Further information about employee conduct is contained in the following documents:

- Commissioner's Instruction No. 7 Code of Ethics
- Code of Conduct
- How to Comply with our Code of Conduct.

Further assistance to determine whether concerns on an employee's performance is substandard or whether the employee's behaviour may relate to a breach of discipline can be obtained through Labour Relations (9264 5126) and/or Standards and Integrity Directorate (9264 4740).

## **52. What does comprehensive evidence mean in relation to the management of unsatisfactory performance?**

Where interactions occur with an employee who is not meeting or sustaining a required standard or level of performance, it is expected that documented evidence be developed and may include:

- current performance management documentation, including performance plans or review documentation
- previous performance management documentation
- email exchanges between the employee and line manager
- records of professional development and support
- copies of notes, memos or diary entries
- records of classroom observation, including video material
- minutes of meetings held with the employee
- formal letters or memos written by the line manager or a superordinate
- whole-of-school planning documents, presentations or development establishing expectations or directions.

It is important to consider that these documents may be made available (or formally requested) in any investigation into the possible substandard performance of the employee and should be structured with this in mind.