



# ABC Know Your Rights Fact Sheet

## Performance Management System

### What is the Performance Management system?

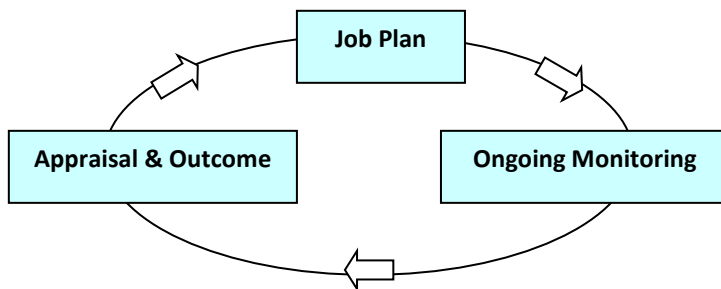
Performance Management (PM) is the system the ABC uses to design jobs, monitor performance, define training and development opportunities and govern salary progression. For more information please refer to Part G of the ABC Enterprise Agreement 2016-2019, the Performance Management Guidelines, the Job Role Templates and the Work Level Standards – all searchable on the ABC Intranet or from your local organiser.

### Do I have to participate in PM?

If you are an ongoing employee, an employee engaged on Nominated Long Term Specified Task Employment, an employee engaged on Nominated Long Fixed Term Employment or an employee on Phased Retirement Employment, then you are required to participate in the PM system (cl.23.1.1).

### How does it work?

1. At the beginning of each 12 month *Performance Cycle*, your *Job Plan* is set for the upcoming 12 months
2. Over the next 12 months your performance and development are monitored and you are provided with regular feedback. You can be promoted in this time.
3. At the end of the 12 month period, you have your Appraisal at which time you receive an *Appraisal Outcome* for your work performance over the previous 12 months and you set your Job Plan for the next 12 months.



Common problems staff may encounter with the PM system include overdue appraisals, disputes about pay or Job Plans and not understanding how the system works.

### Help is available if you need it:

MEAA has put together a series of fact sheets to help you understand PM better. Other fact sheets in this series include Job Plans, Individual Development Plans, Preparing for your Appraisal and Resolving PM Disputes.

### Terms that you NEED to know:

**Performance Cycle:** the 12 month period over which your work is formally evaluated.

**Job Plan:** the document that states your performance requirements and agreed learning activities.

**Appraisal:** the process to evaluate your work and development during a performance cycle.

**Appraisal Outcome:** the evaluation rating given to you as a result of your appraisal.

**Appraisal Due Date:** the date on which your appraisal meeting is due. This date is 1 March for all ABC divisions except ABC Commercial which is 1 July. It is also the date which any salary increments are back-paid to.

**Reconsideration:** the first process by which an employee who is unhappy with their Appraisal Outcome may seek to have it reviewed. The ABC Delegate will make a determination in this process.

**Appeal:** the second process by which an employee who is unhappy with their Appraisal Outcome may seek to have it changed. An Appeal will be conducted by ABC People who will make a recommendation for a determination in this process.

**ABC Delegate:** the ABC manager authorised to sign off on your Appraisal Outcome. Usually your manager's manager.

**To get copies your copies of MEAA fact sheets on PM  
please speak to your local union delegate or call MEAA on 1300 656 512.**

Your MEAA is as strong as you make it. To join, contact MEAA Member Central on 1300 65 65 13 or visit [www.meaa.org/join](http://www.meaa.org/join) | Authorised by Katelin McLnerney, director – MEAA Media



# ABC Know Your Rights Fact Sheet

## Preparing For Your Appraisal

### What is an Appraisal?

The appraisal process refers to the meeting(s) in which you and your manager evaluate your work performance and development activities over the previous 12 months (cl.23.4). Pending this evaluation your manager will give you a rating which determines what pay point you will progress to (cl.23.5.2). Your appraisal is also the time when you and your manager set the following years Job Plan.

### When should you have your Appraisal?

You and your manager must have your first appraisal meeting on or before your Appraisal Due Date (cl.23.2.2). Your manager must give you at least one week's notice of this meeting and provide you with a copy of the previous year's Job Plan prior to your meeting.

### When should you be told your Appraisal Outcome?

You should be advised of your Appraisal Outcome within 1 month of the Appraisal Due Date and no later than 2 months other than for delays due to leave (cl.23.7.5). You will be given a rating of U, UP, M, E or P (cl.23.7.2).

### What you should do prior to your Appraisal?

**For the previous performance cycle:** it is important that you carefully review the Job Plan from the previous year. Additional work that you did which is not written on the Job Plan should be brought to the attention of your manager in the meeting especially if you are seeking a rating of E, a reclassification or a reward for multiskilling. **For the upcoming performance cycle:** it is important that you consider what learning and development activities you would like to pursue and put together a draft plan for your manager to consider. Given that some of these activities may require additional resources, we encourage you to submit this draft to your manager prior to the appraisal meeting as this will give them more time to follow up your requests. Please note that training plans need to be realistic and the more preparation you do the more likely you are to get a positive outcome. For more information about preparing your learning and development plan, please refer to the separate union fact sheet on Individual Development Plan. Copies are available from your local union delegates.

### What should happen in your appraisal?

You and your manager should engage in a positive and constructive dialogue about your work and development during the performance cycle being appraised. Your manager should consider any information you raise and endeavour to get back to you promptly should follow-up be required. You should also engage in a positive and constructive dialogue about the year ahead and what work and development opportunities will be made available to you.

### What can and can't you be appraised against?

You must be appraised against the Performance Requirements in your Job Plan. Your manager must also consider the relevant Work Level Standards.

### Overdue Appraisals

If your appraisal outcomes are not finalised within a reasonable time after the Appraisal Due Date then you will need to lodge a formal complaint in accordance with cl.60 of the ABC Enterprise Agreement. Alternatively you can contact your union and we can make representations on your behalf either individually or as part of a collective representation. For more information please call MEAA on 1300 656 512.

**Know Your Rights Fact Sheets are also available on:** The Performance Management System, Job Plans, Individual Development Plans and Resolving PM Disputes.



# ABC Know Your Rights Fact Sheet

## Individual Development Plans

For more information about Appraisals please refer to Part G of the ABC Enterprise Agreement 2016-2019 and the ABC PM Guidelines or call MEAA to speak to your local organiser on 1300 656 512.

### What is an Individual Development Plan?

The Individual Development Plan is the section of your Job Plan which documents agreed development activities planned for you during the year.

### Do I need to have one?

Yes, if you are an ongoing employee, an employee engaged on Nominated Long Term Specified Task Employment, an employee engaged on Nominated Long Fixed Term Employment or an employee on Phased Retirement employment (cl.23.1.1). The Individual Development Plan accounts for 50% of your Job Plan. It is one of the significant gains secured for ABC employees during employment agreement negotiations.

### What development opportunities may be available to me?

Learning can occur in many different ways such as but are not limited to:

- Structured learning in a classroom environment – i.e. courses
- Informal learning such as on-the-job training, observation shifts, etc
- Mentoring arrangements
- Blended learning which is a mix of face to face and online learning
- Internal placement, in other roles, departments or divisions
- External placement or secondments to related organisations such as Production Companies
- Job Rotations
- Leave without pay to undertake external placements
- Study leave

### Are Individual Development Plans enforceable?

Yes. They form part of the Job Plan and it is an Agreement requirement that all employees specified above have an Individual Development Plan.

### What if my manager says no to my requests?

It is important that your manager clearly explain to you the reasons why any requested learning and development requests are knocked back. Whilst it may not be possible to fulfill all of your requests the ABC has a legal obligation to provide you with some learning and development activities during the performance cycle.

### When should I consider learning and development?

You should definitely put some energy into drafting a learning and development plan in the first couple of months of the year ahead of your appraisal meeting. That way you have time to research opportunities that may be available in and outside your area as well as study leave.

**More Know Your Rights Fact Sheets are available** on The Performance Management System, Job Plans, Preparing for your Appraisal and Resolving PM Disputes. For further information please contact your local union delegate or call MEAA on 1300 656 512.

### Handy Hints

- **Don't be afraid to ask for development opportunities.** The ABC Strategic Plan states that developing ABC people is an organisational priority and essential in a multiplatform environment. The ABC Board has committed \$10 million to staff development and needs to budget and plan ABC activities accordingly.
- **Do your homework.** Don't wait for your manager to take the lead. Show your manager that you are serious about your career by putting in the time and effort to draft your plan prior to your Appraisal.
- **Be flexible.** It may not be possible for your manager to grant you your request this time around, so think about ways you might be able to implement your plan over a longer period of time.
- **Think about how the development opportunities can benefit the ABC as well as you.** Mutually beneficial development opportunities are more likely to be approved.

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# ABC Know Your Rights Fact Sheet

## Job Plans

An important change secured for ABC staff as part of your new employment agreement, was the commitment to streamline the ABC PM system and simplify the paperwork. You will now be able to use the following jargon reduced form to complete your Appraisals.

### THE PERFORMANCE AGREEMENT:

**The ABC Delegate** – this is the manager authorised to sign off on your Appraisal Outcome. Who the delegate is should be made known to you and written in Part 1 of the form before you sign off on your paperwork.

**Part 2: A change from previous years** - you no longer tick to Agree or Disagree with your Appraisal. This change brings the form into line with the long-standing provision that ABC management can set a Job Plan without your agreement. In the past, a space was provided to note your reasons for not agreeing. This change does not effect your ability to lodge a Reconsideration or Appeal.



#### Redbook Performance Agreement 2018/2019

Content Maker  
Technologist  
Admin / Professional

1. Employee Information			
Employee Name	Click here to enter text	Job Title	Click here to enter text
Employee No.	Click here to enter text	SAP Position No.	Click here to enter text
Classification	Choose classification	Location	Click here to enter text
Current Salary	Choose band	Pt. Enter point	Department
Emp. Type	Choose employment status	Team	Click here to enter text
Manager Name	Click here to enter text	Manager Title	Click here to enter text
Delegate Name	Click here to enter text	Delegate Title	Click here to enter text
Cycle Starts	Click here to enter date	Appraisal Due Date	1 March 2019

2. Job Plan
(Part A. Performance Requirements and Part B. Individual Development Plan)
Your Job Plan is set at your current band.

3. Appraisal Outcomes				
Manager writes up and recommendation completed following the Appraisal & Planning Meeting				
The performance rating and salary outcome options can be found in the <a href="#">ABC Enterprise Agreement 2016-2019</a> .				
Rating	Choose rating	See appraisal page for Rating Key	(band 9 only – insert salary)	(2% top of band only – insert amount)
Salary Outcome	Choose outcome	Choose band	Pt. Enter point	\$ . Enter salary
Manager Sign-Off	Date		Click here to enter date	

4. Approval		
Delegate Sign-Off	Date	Click here to enter date

*If Delegate approves alternative to Manager's recommendation, state reasons in space provided on Appraisal page*

Following Delegate approval, Manager to advise Employee of Appraisal Outcomes and email a copy of the signed document to the National Pay & Entitlements Centre (NPEC) ([national.pay@abc.net.au](mailto:national.pay@abc.net.au)).

**Performance Cycle** – this field shows the performance cycle to which your Job Plan (both the Performance Requirements and the Individual Development Plan) apply to. This is the paperwork that you will be appraised against in 2012.

**Appraisal Outcome and Approval** – Parts 3 & 4 will be filled in after your appraisal meeting(s). The ABC Delegate must sign Part 4 before you can be formally advised of your Appraisal Outcome.

# YOUR JOB PLAN IS COMPRISED OF TWO EQUAL PARTS:

## PART A: PERFORMANCE REQUIREMENTS

**Objectives** – the goals, targets and standards to be achieved over the performance cycle. Objectives must be S.M.A.R.T (specific, measurable, achievable, realistic and time-bound). Example: Originate a minimum of 10 ideas per year which result in local stories being broadcast/published.”

Job Plan	
This Job Plan is set at <span>Choose band.</span>	
A. Performance Requirements	
Objectives	Measures (Optional)
Goals, targets or standards to focus on over the performance cycle. Objectives should be SMART: Specific, Measurable, Achievable, Realistic, Time-bound.	Agreed yardsticks or indicators of performance against the Objectives - only needed when they are not self-evident in the Objectives.
1. <insert heading> <insert objective/s>	<insert measures>
2.	
3.	
4.	
5.	

The Band Level which your Job Plan has been set for the upcoming cycle. You can request this be set at a higher band if you are seeking promotion to a higher band.

Measures are the indicators used to assess if you achieved your objectives. They should only be used if measure is not clear from SMART objective.

## PART B: INDIVIDUAL DEVELOPMENT PLAN

Job Plan (continued)			
B. Individual Development Plan			
Capability to develop	Development Activity	Evidence of Completion	By When
Skills/knowledge/attributes to be developed	Agreed development activities planned over the cycle		

**Individual Development Plan** – your Job Plan must state the agreed learning and development that you and your manager have agreed to as part of your Appraisal process. **It should NOT be left blank.**

You are encouraged to complete a draft of this section of the form and give it to your manager ahead of your appraisal meeting so that you both have time to research what development opportunities may be available to you. For more information about completing this section of the Job Plan, please refer to our separate fact sheet on Individual Development Plans.

### Additional fields you need to know about:

If you are seeking an E rating, a reclassification or a reward for multiskilling it is critical that you include details for any relevant work you did which was not recorded in your Job Plan during the Performance Cycle.

Delegate Comments
<i>If Delegate approves alternative rating/salary to manager's recommendation, provide reasons</i>





# ABC Know Your Rights Fact Sheet

## Resolving PM Disputes

If you encounter problems with your Job Plan or the Performance Management system, you have a number of rights available to you under your ABC Enterprise Agreement 2016-2019 that can help you to resolve the matter.

### Discuss the matter with your manager

In the first instance, you should always try to resolve matters locally by raising your concerns with your immediate manager. Not only is this common sense but it is also a requirement in your employment agreement (cl.10.1.3b and cl.60.4.1). If local discussions do not result in a resolution, you can then proceed to the more formal options.

### Ask for a Reconsideration

If you disagree with your appraisal rating, your salary outcome or the level at which your Job Plan is set, then you may ask for a Reconsideration within 14 days of receiving your formal Appraisal Outcome signed by the ABC Delegate. You will need to write to ABC People to seek a Reconsideration, stating the reasons you believe the Appraisal Outcome is wrong. Your union can assist you to write this letter and prepare support documentation.

ABC People will then consider all the relevant information, including information gathered in their own inquiries and make a recommendation to the Director of the relevant ABC division, or their delegate, as to whether the original decision should be upheld or changed. (cl 60.4.4)

The Director, or their delegate, will either reject or accept the ABC People recommendation within 30 days and advise you of their decision the matter and advise you of their decision within 7 days of receipt of your request (cl.60.4.2). If the Director rejects the recommendation from ABC People, you will be provided with clear reasons, in writing, within 30 Days.

### Lodge an Appeal

If you are still not satisfied with the outcome, you may lodge an Appeal with Fair Work (cl.60.4.7), if you can establish that the Director or delegate in making the decision breached a provision of the Agreement, allowed irrelevant matters to guide their decision, mistook the facts or failed to take into account a material consideration. You must lodge the Appeal no more than 120 days from the date the Director or delegate advised you of their decision regarding ABC People's recommendation.

**Appeals are serious matters and we strongly urge you to contact MEAA before proceeding so that we can assist you. Call 1300 65 65 13 or speak to your local House Committee delegate before proceeding.**

### Raise the matter as a Grievance

Any matters that relate to the PM system that are not directly related to your Appraisal Outcome may be dealt with informally through the Personal Grievance Resolution process (cl.59). Examples of matters which could be raised under this section of the agreement include issues relating to the reallocation of your duties, lack of reasonable development opportunities for you in your individual development plan or the manner in which the appraisal was conducted. For more information about how to lodge a personal grievance please call us.

**Call MEAA before you start this process - contact your local union delegate on 1300 656 512.**

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### Handy Hints

- **Focus on facts.** What is the black and white information that supports your claim – Work Level Standards, written documents, emails, dates, times, agreement clauses, on the record statements.
- **Write coherently.** Present your information in a logical way so that someone reading it for the first time can immediately understand what's going on. If your letter is confusing then you are making it harder for the decision-maker to support your case.
- **Seek advice from informed people.** Speak to your union as we are experienced and well equipped to help you to resolve your matter.

