### TEMPLATE 1 – Performance Agreement and Assessment Template

| EMPLOYEE | | MANAGER | | PERFORMANCE  AGREEMENT PERIOD | |
| --- | --- | --- | --- | --- | --- |
| Name |  | Name |  | From |  |
| Position |  | Position |  | To |  |
| **PART A – OUTCOMES: SETTING OBJECTIVES, MEASURES AND CAPABILITIES** | | | | | |
| **Council or work group strategic or operational goal 1** (group employee objectives or tasks under relevant council or work group goals): | | | | | |
| **Objective or task** (short description) | | **Results** (add comments to ratings as necessary) | | | |
|  | | **Overall:** achieved/ partly achieved/ not achieved | | | |
| **Measure(s)** (e.g. timeliness, accuracy, quality) | |  | | | |
| 1….. | | 1. achieved / partly achieved/ not achieved | | | |
| 2….. | | 2. achieved / partly achieved/ not achieved | | | |
| **Capabilities** (maximum of 3 per objective or task) | |  | | | |
| 1….. | | 1. demonstrated/ partly demonstrated/ not demonstrated | | | |
| 2….. | | 2. demonstrated/ partly demonstrated/ not demonstrated | | | |
| **Objective or task** | | **Results** | | | |
| ….. | | **Overall:** achieved/ partly achieved/ not achieved | | | |
| **Measure(s)** | |  | | | |
| 1….. | | 1. achieved / partly achieved/ not achieved | | | |
| **Capabilities** | |  | | | |
| 1….. | | 1 demonstrated/ partly demonstrated/ not demonstrated | | | |
| **Council or work group strategic or operational goal 2:**  ….. | | | | | |
| **Objective or task** | | **Results** (add comments to ratings as necessary) | | | |
| ….. | | **Overall:** achieved / partly achieved / not achieved | | | |
| **Measure(s)** | |  | | | |
| 1….. | | 1. achieved / partly achieved / not achieved | | | |
| 2..… | | 2. achieved / partly achieved / not achieved | | | |
| **Capabilities** | |  | | | |
| 1….. | | 1. demonstrated / partly demonstrated / not demonstrated | | | |
| 2….. | | 2. demonstrated / partly demonstrated / not demonstrated | | | |
| **PART B – DEVELOPMENT** | | | | | |
| 1. **Technical/professional skills and knowledge** | |  | | | |
| Objective: | |  | | | |
| Actions: | | Result: Actions were/ were not completed | | | |
| 1. **Capabilities** | |  | | | |
| Objective: | |  | | | |
| Actions: | | Result: Actions were/ were not completed | | | |
| Actions: | | Result: Actions were/ were not completed | | | |
| 1. **Career Progression/Development** | |  | | | |
| Objective: | |  | | | |
| Actions: | | Result: Actions were/were not completed | | | |
| Objective: | |  | | | |
| Actions: | | Result: Actions were/were not completed | | | |

### TEMPLATE 2 – Performance Agreement Sample

| EMPLOYEE | | MANAGER | | PERFORMANCE  AGREEMENT PERIOD | |
| --- | --- | --- | --- | --- | --- |
| Name | Jane Smith | Name | Terry Wong | From | 1 July 2017 |
| Position | Manager, Development Services and Planning | Position | Director, Development and Strategy | To | 30 June 2018 |
| **PART A – OUTCOMES: SETTING OBJECTIVES, MEASURES AND CAPABILITIES** | | | | | |
| **Council or work group strategic or operational goal 1:**  Council will deliver a high quality, efficient development application service to the community | | | | | |
| **Objective or task** | | **Results** | | | |
| Develop a new system for processing DA applications to improve consistency and timeliness of decisions | | **Overall:** achieved  The new system is working well, feedback from the community has been very positive | | | |
| **Measures** | |  | | | |
| 1. New system designed by 30 November; piloted by 31 March 2018; fully rolled out by 31 May 2018. | | 1. achieved  A detailed project plan was drawn up and monitored; all key milestones were achieved on time and to quality required | | | |
| 2. Sample review demonstrates consistent decision making by class of application. | | 2. achieved  Independent review confirms this measure as met. | | | |
| **Capabilities** (maximum of 3 per objective or task) | |  | | | |
| 1. Work collaboratively - Advanced | | 1. demonstrated  Jane demonstrated high level consultation and collaboration capabilities in working with internal stakeholders and the community. Feedback was excellent. | | | |
| 2. Deliver results – Adept | | 2. demonstrated | | | |
| **Council or work group strategic or operational goal 2:**  Council will manage physical assets to promote sustainable development in the region | | | | | |
| **Objective or task** | | **Results** | | | |
| Deliver a new coastal management development control plan | | **Overall:** partly achieved | | | |
| **Measures** | |  | | | |
| 1. Consultation draft of new plan provided to Council executive by 30 October 2017 | | 1 achieved | | | |
| 2. Final published and implemented by 30 June 2018. | | 2 partly achieved  The consultation draft comprehensively reflected internal stakeholder views and was approved by the executive for public consultation. The process of public consultation was delayed, and the key messages didn’t resonate with some community members, with resulting delays and some dissent for the final plan. | | | |
| **Capabilities** | |  | | | |
| 1. Plan and Prioritise - Advanced | | 1. partly demonstrated  The process of drafting the document was very good. However, the plan for organising widespread consultation was too high level and would have benefited from better targeting to different segments of the community. | | | |
| **PART B – DEVELOPMENT** | | | | | |
| 1. **Technical/professional skills and knowledge** | |  | | | |
| Objective: stay abreast of current legislative developments affecting local government | |  | | | |
| Action: read relevant publications, newsletters, etc  Action: attend information seminars. | | Result: Both actions were completed  Jane attended the series of seminars conducted by LGNSW on current reforms. | | | |
| 1. **Capabilities** | |  | | | |
| **Objective:** develop Workforce Leadership capabilities. In particular: Optimise Workforce Contribution at Adept level. | |  | | | |
| Action: develop team workplan that takes into account existing team capabilities and planned development  Action: attend external training course on staff performance management | | Results: Team workplans were developed and worked well.  Jane hasn’t yet attended the external training course – needs to be included in the new performance agreement. | | | |
| 1. **Career Progression/Development** | |  | | | |
| Objective: Jane would like to broaden her experience by working in different council areas, to give her a strong basis for progressing to senior executive level over time. | |  | | | |
| Actions: Organise 6 month rotation in another area of Council | | Result: Action is underway. A rotation opportunity has been lined up for July to December 2018. | | | |



**For further information:**

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