



THE UNIVERSITY OF
MELBOURNE

PERFORMANCE AND DEVELOPMENT FRAMEWORK

PREPARING FOR YOUR 2020
PDF CONVERSATION



Overview

This Guide should be read in conjunction with the PDF Guide for Professional Employees.

As we approach the end of the 2020 Performance year, your Manager will be preparing to review the performance of their team as well as set new goals and objectives for 2021.

The 2020 Performance year has presented our workforce with unprecedented challenges due to the COVID 19 pandemic the virtual work environment, shifting priorities and in many cases juggling personal and work commitments more than ever before.

The 2020 PDF will run with no changes to timeframes or rating descriptors. This guide is to support staff to prepare for their 2020 PDF conversation.

This guide will assist you in understanding how you can best prepare for your PDF conversation; preparing for a conversation in a context where performance indicators or performance opportunities may have significantly changed; and where you can get further assistance.

PERFORMANCE RELATIVE TO OPPORTUNITY (PRO)

Applying the principle of PRO ensures a fair and equitable approach to the achievements of staff relative to the opportunities available.

The consideration of PRO does not assume or expect lesser standards of performance, rather assessing achievements in the context of personal or work circumstances that may have had an adverse effect.

The COVID-19 pandemic will have both short and long term effect on individual achievements and it is important to take this into account. The impacts will differ for individuals.

Impacts may include, but are not limited to:

- care giving responsibilities
- home schooling
- changed flexible working arrangements
- self-isolating and unable to work
- medical conditions (including mental health considerations) and/or
- significant changes to workload

Before your PDF meeting you may want to prepare and be ready to discuss the specific impacts of your particular personal circumstances on your work achievements

Examples:

You had additional caring responsibilities for an elderly relative in 2020. You were unable to take on all the work responsibility you normally would. Your manager takes this into account when assessing goals and achievements in determining your overall Year End Rating by acknowledging the achievements that were made, the informal support you provided to team members during 2020 and the steps put in place to manage personal and work responsibilities.

You have not progressed 2 goals due to changed and competing priorities as a result of COVID-19. In 2020 you provided support to Pandemic Reset activities and took on additional informal duties to keep colleagues socially connected. The informal activities did not form part of an agreed goal, however the impact and your proactive actions to support the team is acknowledged by your manager in determining the overall Year End Rating.

Before the conversation - preparation

Preparation

Ensure you have allowed yourself enough time before the discussion to prepare your evidence portfolio. It is recommended you read the PDF Guidelines for Professional Employees to help prepare.

Think about what you have achieved in the past 12 months.

- Your key contributions to the team, division, or the University;
- What development you have undertaken;
- Revisit the goals set through the year (if relevant);
- Where no goals were set together, ask them to consider what goals they worked towards through the year. When doing so, think about: **What was the goal and what was the achievement/outcome?**
- Any other factors that contribute to your performance.

Make notes for the discussion and gather a range of documents that can be used to substantiate your performance and achievements.

Your individual circumstances

The circumstances and challenges of virtual working will be different for each person and it is important that your manager is aware of your individual circumstances. Be sure to discuss your circumstances with your manager. These might include:

What factors impacted performance were out of your control?

- Work may have had to pivot
- Projects may have been paused
- Technology challenges
- Unplanned work may have taken precedence
- Difficulty maintaining BAU activity/processes due to the environment

Goals may not have been set prior to commencement of remote working, or goals may have changed. If this is the case, you should agree with your manager in advance what is being assessed. Consideration should be given to your overall performance across the year and assessment made against your achievements and how this contributed to division and University success.

Consider your contributions to initiatives that became a priority during the year.

What initiative or innovative ideas and actions during the year contributed to customer or team success, connection, or process improvement?

How did you go about your work? What behaviours did you demonstrate and the impact on others?

Did you take proactive steps to develop your capability or network which improved your performance or that of the team or University?

Give consideration to Performance Relative to Opportunity.

Face to face conversations

If you are unable to participate in a Zoom call from a private setting and would prefer to conduct the discussion face-to-face, you are able to request your manager arrange access to a space on campus for this purpose.

Virtual PDF Conversations

While all of us are now very used to remote working some of our remote ways of working will be even more important during a PDF conversation.

Be present. Make sure that you have the time blocked out in your calendar, with a buffer either side. Be present and engaged in the conversation.

Be seen. Zoom fatigue is real, but for a PDF conversation using video will be important, it's much more personal. Because there are no context cues it can be easy to have misunderstandings. Pay close attention to body language – both yours and your manager's.

Be a good listener. Don't talk over the other person. Listen with the intent to understand. Encourage back and forth communication and take the time to make sure things are not lost in translation.

Be on time. Join the meeting on time and be sure to have all your supporting documentation on hand and ready for the discussion.

Prepare. Being prepared and articulate can help reduce anxieties and miscommunication.

During the PDF conversation

Controlling anxiety

This has been a challenging year and there may be increased levels of anxiety about performance reviews. Try to relax and keep things in perspective. Remember, your performance rating will not impact on other organisational activities such as Professional Services Review. PDF is about performance relative to goals and opportunities; Professional Services Review is about the organisation structure and position requirements going forward.

Please reach out to your HR team or consult the EAP [Benestar](#) if you would like support.

TOP TIPS

- Prepare in advance
- Understand and communicate your individual circumstances
- Understand varying opportunity in the current environment
- Remember your performance rating will not impact on other organisational activities such as PSR

Further questions or need support?

Contact your [local HR team](#) for more information or support.