Demystifying Performance and Development Planning

Performance and Development Planning (PDP)

Strategic Priority 6: Maintaining Capability and Capacity of Staff
Learning Outcomes

At the conclusion of this session participants will be able to:

• Describe Performance and Development Planning (PDP) processes for nurses and midwives within MNHHS

• Outline strategies and processes for aligning own development goals to the PDP processes

• Outline strategies and processes to support others in completing the PDP documentation

• Describe the benefits of a consistent approach to PDP for nurses and midwives within MNHHS
The career development of a nurse or midwife is based on individual, organisational & professional imperatives & includes short & long-term goals.

The professional career development of the nurse/midwife is ‘uniquely personal yet aligned to the directions of the nursing & midwifery profession & responsive to community & organisational expectations’. Following registration, nurses & midwives embark on the pathway of continuous career development to maintain & enhance standards of practice & professional growth.

Continuing Professional Development (CPD) is “… the means by which members of the profession maintain, improve & broaden their knowledge, expertise & competence & develop the personal & professional qualities required throughout their professional lives” (NMBA, 2010: 1).

Orientation & Induction

Orientation is the process by which new employees are provided with the opportunity to gain knowledge & understanding of Metro North HHS as an organisation, including its mission, strategic objectives & scope of the operation & specific legislative, mandatory & requisite training & assessment.

Transition Processes

Transition is the period of learning & adjustment in which the new staff member acquires the skills, knowledge & values required to become an effective member of the health care team. This applies to:

- new employees
- new graduates (registered & enrolled)
- re-entry & refresher nurses & midwives
- any nurse/midwife transferring from one area of practice to an unfamiliar area of practice.

Education goals during this period need to take into account the individual’s level of experience, skills & knowledge as they enter a specific practice area.

Workplace Learning – “… involves the process of reasoned learning towards desirable outcomes for the individual & the organisation. These outcomes should foster the sustained development of both the individual & the organisation, within the present & future context of organisational goals & individual career development” (Kitto, et al., 2014: 1).

Supported by:
- Preceptorship & Clinical Supervision
- Mentoring; Clinical Supervision; Succession Management; & Leadership

Metro North Hospital & Health Service Performance & Development Planning (PDP) System

Model adapted from the QH Queensland Health Nursing and Midwifery Lifelong Learning Model by the MNHHS Nursing & Midwifery Education & Workforce Development Committee – Subgroup: Scope of Practice
PDP Requirements

Covered under HR Policy G9

- Clarify the work standards and behaviours expected of employees
- Focus on mutual responsibility and regular conversations
- Legislated under:
  - Hospital and Health Boards Act (2011)
  - Public Service Act (2008)

Key elements

- Set and clarify expectations
- Regular two way conversations (at least every 6 months)
- Plan and review plans and performance
- Develop capability
- Recognise performance achievements
- Resolve performance issues
PDP Timeframes

Initiate Agreement
• New starters initiate PDP no later than 3 months after commencement
• Negotiate and implement PDP Agreement using agreed standards and indicators

6 Month Review
• Mid term review and discussion

12 Month Appraisal and Initiate New PDP
• Formal annual review
• Achievement against Key Performance Indicators is appraised
• Performance goals and development needs are determined for the next year

Ask the employee to evaluate own performance and achievement of performance targets
What is PDP about?

- PDP provides an opportunity for you to:
  - Talk with your team leader about how you are performing in the role
  - Discuss what helps and hinders you in performing your role
  - Consider how you want to improve
  - Set professional short, medium and long term career goals
  - Gain feedback from the Team Leader about your performance and how you could improve

This is influenced by the organisational context
What is the process?

1. Review current PDP (if applicable) – ideally, start one month before your current PDP expires.

2. Review Role Description, Service Profile, NMBA Standards for Practice and other relevant documents

3. Draft new PDP

4. Meet with your Team Leader to discuss draft PDP and get feedback on your performance

5. If necessary, make changes to your PDP and finalise

6. Sign off by you, Team Leader and Professional Lead e.g. NUM.

7. Schedule 6 month PDP review meeting

8. Start working towards your PDP
Developing your new PDP

1. It’s all about me….

• Read your Role Description and other documents

• Then think about your job…
  – What are my major tasks?
  – What are my major responsibilities within the team?
  – Do I have any portfolio’s?
  – What are my goals for this current year to help me meet these work based expectations?
  – How will I demonstrate I am meeting these goals?
  – What would I like to get better at doing in my job?
  – Align these to your role description, service profile etc
Developing your new PDP
2. It’s also about the team and the organisation

• Think about your Unit and the Organisation
  – What are the strategic directions / plans for my organisation? (Service Profile is helpful here)
  – What is the main focus of my team?
  – Which of these am I meeting?
  – What are some changes we can expect in the next 12 months?
  – How are junior staff and students supported? (succession management, developing the profession).

• Complete a self-assessment against the Standards for Practice (take to meeting)
## MNHHS PERFORMANCE & DEVELOPMENT PLANNING AGREEMENT
FOR NURSING & MIDWIFERY PERSONNEL
(oc/psst/ANs)

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### Facility/Service/Work Unit

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#### 6 Month Review

**Reporting Officer’s Comments**

**Employee’s Comments**

**Employee’s satisfaction with PDP process**

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#### 12 Month Appraisal

**Reporting Officer’s Comments**

**Employee’s Comments**

**Performance Result:**

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**Conduct/MNHHS Values**

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**EMPLOYEE**

Name: __________________________
Signature: ______________________

Name: __________________________
Signature: ______________________

Name: __________________________
Signature: ______________________

**REPORTING OFFICER**

(Line Manager)

Name: __________________________
Signature: ______________________

Name: __________________________
Signature: ______________________

Name: __________________________
Signature: ______________________

**REVIEWING OFFICER**

(As required)

Name: __________________________
Signature: ______________________

Name: __________________________
Signature: ______________________

**DATE COMPLETED**

__________________________
__________________________
__________________________

1. The Reviewing Officer signs the original document(s).
2. Reporting Officer to retain original PDP Agreement. Employee to retain a copy of PDP Agreement.
3. The date of PDP Agreement completion is to be recorded on the Nursing & Midwifery facility/service database.

Addendum to be attached to this agreement by Line Managers/Preceptors:

1. Relevant competency assessment tool (rating scale)
2. Performance & Development Planning Profile Form
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6 Month Review:
- Reporting Officer’s Comments
- Employee’s Comments
- Employee’s satisfaction with PDP process
  - Extremely Dissatisfied
  - Dissatisfied
  - Neutral
  - Satisfied
  - Extremely Satisfied

12 Month Appraisal:
- Reporting Officer’s Comments
- Employee’s Comments
- Performance Result:
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REPORTING OFFICER (Line Manager)
- Name: ............
- Signature: .......

REVIEWS OFFICER (As required)
- Name: ............
- Signature: .......

DATE COMPLETED
/ / / / / /

1. The Reviewing Officer signs the original document/s.
2. Reporting Officer to retain original PDP Agreement. Employee to retain a copy of PDP Agreement.
3. The date of PDP Agreement completion is to be recorded on the Nursing & Midwifery 2009/2010/2011 database.

Addendum to be attached to this agreement by Line Managers/Preceptors:
1. Relevant competency assessment tool (rating scale)
2. Performance & Development Planning Profile Form
## MNHHS Performance & Development Planning Agreement

**For Nursing & Midwifery Personnel**

**Employee ID:**

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### 6 Month Review

- Reporting Officer's Comments
- Employee's Comments

### Employee's Satisfaction with PDF Process

- [ ] Extremely Dissatisfied
- [ ] Dissatisfied
- [ ] Neutral
- [ ] Satisfied
- [ ] Extremely Satisfied

### 12 Month Appraisal

- Reporting Officer's Comments
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### Performance Result

- [ ] Poor
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### On Completion

#### Initial Agreement

- Name: 
- Signature: 

#### 5 Month Review

- Name: 
- Signature: 

#### 12 Month Appraisal

- Name: 
- Signature: 

### Addendum to be attached to this agreement by Line Managers/Preceptors:

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### MNHHS Performance & Development Planning Agreement

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Addendum to be attached to this agreement by Line Managers/Preceptors:

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Part 1: Performance Plan

Role Description Summary

• Review Position Description & Service Profile
• Write brief summary in own words
Role Description Summary

Taken from “Purpose of Role’ in Role Description

- **Responsible for the provision of nursing/midwifery and delegated activities**
- **Responsible for the provision of nursing care that meets the NMBA Standards for Practice & other professional practice standards relevant to the position.**
- **Assumes individual accountability for actions within the position.**

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Plan Objectives

• Use Self Assessment using relevant NMBA Standards for Practice for role

• Review Role Description – ‘Key Accountabilities’ & ‘How you will be assessed’

• Select approximately three areas for further development

• All clinical staff are required to report against the provision of patient-focussed care
## Role Description Summary

*Taken from “Purpose of Role’ in Role Description*
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  Taken from  
  • Key Accountabilities  
  • Are you the right person for the Job | (Understand and comply with Policy)  
  • Demonstrated ability to provide patient-focussed care & problem solving commensurate with NMBA competency standards.  
  There is an expectation all clinical staff respond to the above objective relevant to their Job Description. | | |
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| *(Understand and comply with Policy)*  
• Demonstrated ability to provide patient-focussed care & problem solving commensurate with NMBA competency standards.  
*There is an expectation all clinical staff respond to the above objective relevant to their Job Description.* | | | |
| *(Documentation)*  
Well-developed oral and written communication skills to enable effective interaction in individual and group situations. | | | |
Key Responsibilities

• Select key elements from self assessment conducted using the relevant competency tools

• Match these elements to the selected position description key responsibilities / skills / accountabilities
### Role Description Summary

*Taken from “Purpose of Role’ in Role Description*

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| (Understanding and comply with Policy)  
  * Demonstrated ability to provide patient-focused care & problem solving commensurate with NMBA competency standards. There is an expectation **all** clinical staff respond to the above objective relevant to their Job Description. | Criteria 1.4  
  * Complies with legislation, regulations, policies, guidelines and other standards or requirements relevant to the context of practice when making decisions | | |
| (Documentation)  
  Well-developed oral and written communication skills to enable effective interaction in individual and group situations. | Criteria 7.3  
  * Determines, documents and communicates further priorities, goals and outcomes with the relevant persons | | |
Strategies & Timeframes

• Identify strategies (actions) to achieve the selected elements
• Set achievable time frames
Performance Indicators

• How are you going to provide evidence that the objectives and responsibilities have been met

• Record the evidence of achievement of strategies throughout the year & discuss at 6 & 12 month review
### Role Description Summary

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- NMBA Criteria 1.4 Complies with legislation, regulations, policies, guidelines and other standards or requirements relevant to the context of practice when making decisions
- NMBA Criteria 6.2 Practices within own scope of practice
- NMBA Criteria 4.2 Uses a range of assessment techniques to collect relevant & accurate data
- NMBA Criteria 7.3 Determines, documents and communicates further priorities, goals and outcomes with the relevant persons
- NMBA Criteria 4.1 Conducts assessments that are holistic as well as culturally appropriate

- Familiarises self with & applies requirements for legal practice – Ongoing

- Completes Scope of Practice Learning Package – March 2016
- Allocation to a broad variety of patients with complex health needs - Ongoing
- As above

- As above

- All Mandatory & relevant Requisite skills completed
- Legal requirements for nursing care, including medication administration adhered to
- Completed SOP Learning Package
- Undertook decisions about care that are within scope of competence without consulting senior staff
- Collaboratively identified actual & potential health problems through accurate interpretation of data
- Priorities for care determined & nursing interventions performed following comprehensive & accurate assessments
- Monitored responses to interventions & adjusted care accordingly
- Communicated new information & revisions to members of the health care team, as required.
Part 2: Performance Plan

• At initial planning meeting discuss requirements of employment regarding QG Code of Conduct and MNHHS Values

• Document demonstrated evidence of compliance with QG Code of Conduct and MNHHS Values at 6 and 12 months or as required
PART 2: PERFORMANCE PLAN
Discuss how the MNHHS Values and five priorities are demonstrated in your daily activities.

<table>
<thead>
<tr>
<th>MNHHS Values</th>
<th>Typical Behaviours demonstrated (click on the below links for ideal examples)</th>
<th>6-month performance expectations</th>
<th>6-month performance expectations</th>
</tr>
</thead>
</table>
| **Respect**       | • Interpersonal savvy  
• Manages conflict  
• Communicates effectively  
• Balances stakeholders  
(Insert as observed / appropriate and provide feedback to your team member) | □ Meets expectations  
□ Does not meet expectations | □ Meets expectations  
□ Does not meet expectations |
| **Teamwork**      | • Collaborates  
• Develops talent  
• Values differences  
• Builds effective teams  
(Insert as observed / appropriate and provide feedback to your team member) | □ Meets expectations  
□ Does not meet expectations | □ Meets expectations  
□ Does not meet expectations |
| **Compassion**    | • Customer/patient focused  
• Demonstrated self-awareness  
• Manages ambiguity  
• Demonstrates resilience  
(Insert as observed / appropriate and provide feedback to your team member) | □ Meets expectations  
□ Does not meet expectations | □ Meets expectations  
□ Does not meet expectations |
| **Integrity**     | • Decision quality  
• Ensures accountability  
• Courage  
• Manages complexity  
(Insert as observed / appropriate and provide feedback to your team member) | □ Meets expectations  
□ Does not meet expectations | □ Meets expectations  
□ Does not meet expectations |
| **High Performance** | • Cultivates innovation  
• Action oriented  
• Drives results  
• Drives vision and purpose  
(Insert as observed / appropriate and provide feedback to your team member) | □ Meets expectations  
□ Does not meet expectations | □ Meets expectations  
□ Does not meet expectations |

For more information about how these competencies translate into behaviours for your role, please refer to the Metro North Capability Framework and examples of ideal behaviours for each of our Values for [early career](#) or [mid-career / middle management](#) or [senior management / executive level roles](#).
## PART 2: PERFORMANCE PLAN
Discuss how the MNHHS Values and five priorities are demonstrated in your daily activities.

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</table>
| **Respect**      | • Expresses viewpoints respectfully  
• Values others’ perspectives and points of view  
• Able to communicate clearly – written and verbal  
• Considers needs of stakeholders equally | ☐ Meets expectations  
☐ Does not meet expectations | ☐ Meets expectations  
☐ Does not meet expectations |
| **Teamwork**     | • Works collaboratively with colleagues  
• Seeks opportunities for professional development  
• Recognises the importance of teamwork in health service delivery  
• Ensures own training and skills are adequate for the role  
• Recognises that own way of thinking and communicating is not the only way | ☐ Meets expectations  
☐ Does not meet expectations | ☐ Meets expectations  
☐ Does not meet expectations |
| **Compassion**   | • Genuinely cares about people  
• Reflects on past mistakes  
• Deals effectively with unusual situations and seeks help when necessary  
• Welcomes and learns from feedback | ☐ Meets expectations  
☐ Does not meet expectations | ☐ Meets expectations  
☐ Does not meet expectations |
| **Integrity**    | • Understands own ethical obligations in decision making  
• Takes accountability for everything within own jurisdiction and control  
• Reports incidents of undesirable conduct or performance  
• Keeps the bigger picture in mind | ☐ Meets expectations  
☐ Does not meet expectations | ☐ Meets expectations  
☐ Does not meet expectations |
| **High Performance** | • Seizes opportunities to improve service delivery  
• Strives to achieve deadlines and organises work accordingly  
• Looks for better ways of doing things  
• Connects personally with Metro North’s Vision and Purpose | ☐ Meets expectations  
☐ Does not meet expectations | ☐ Meets expectations  
☐ Does not meet expectations |
## PART 3: DEVELOPMENT PLAN
Consider part 1 & 2 when you outline your development needs including skills and knowledge required.

<table>
<thead>
<tr>
<th>Skills and Knowledge Required</th>
<th>Developmental Activities</th>
<th>Comments – Mid Cycle Review</th>
<th>Comments – Annual Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ability to facilitate teaching and learning</td>
<td>• Attend Preceptor Program&lt;br&gt;• Preceptor new starter nurses</td>
<td>• Attended the Preceptor Program 27/08/15&lt;br&gt;• Demonstrates ongoing effective preceptor relationship with 2 staff (commenced Sept &amp; Nov. 2014).</td>
<td></td>
</tr>
<tr>
<td>• Advanced clinical skills, knowledge &amp; abilities</td>
<td>• Attend Patient Assessment Workshop&lt;br&gt;• Attend CPR Resource Persons’ Workshop</td>
<td>• Attended Patient Assessment Workshop 02/07/09&lt;br&gt;• Attended CPR Resource Persons’ Workshop 15/10/14&lt;br&gt;• Jacqui needs to provide &amp; implement plan for BLS training &amp; assessment of all 7C East staff</td>
<td></td>
</tr>
<tr>
<td>• Leadership &amp; Management</td>
<td>• Perform Shift Coordinator role with support of senior staff&lt;br&gt;• Participate in Leadership &amp; Management program/s&lt;br&gt;• Undertake CQI portfolio</td>
<td>• Jacqui commenced Shift Coordinator role in Nov. 2014 &amp; demonstrated advanced clinical problem-solving &amp; supportive behaviours&lt;br&gt;• Jacqui is yet to commence Leadership &amp; Management training. Plan to progress in Sem.1 2016&lt;br&gt;• Jacqui needs to increase her involvement in CQI portfolio team</td>
<td></td>
</tr>
<tr>
<td>Career Goal</td>
<td>Developmental Activities</td>
<td>Progress – Mid Cycle Review</td>
<td>Progress – Annual Review</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Clinical Nurse (Grade 6)</td>
<td>As per Developmental Plan&lt;br&gt;<strong>plus</strong>&lt;br&gt;• Initiate a Mentoring relationship&lt;br&gt;• Apply to attend relevant professional conference/s&lt;br&gt;• Investigate post-graduate courses</td>
<td>• Refer to Development Plan comments&lt;br&gt;• Jacqui has yet to approach a Mentor.&lt;br&gt;• Plan to initiate in Sem.2 2018</td>
<td></td>
</tr>
</tbody>
</table>
**PERSONNEL FILE COPY**  
**CONFIDENTIAL**  
**PERFORMANCE & DEVELOPMENT PLANNING AGREEMENT FOR**  
**NURSING & MIDWIFERY PERSONNEL**  

**TO BE COMPLETED AFTER ANNUAL FINAL REVIEW DISCUSSION**

<table>
<thead>
<tr>
<th>EMPLOYEE’S NAME:</th>
<th>EMPLOYEE’S NO:</th>
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<tbody>
<tr>
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<table>
<thead>
<tr>
<th>POSITION:</th>
<th>POSITION CLASSIFICATION:</th>
<th>LOCATION/UNIT:</th>
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<tbody>
<tr>
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<table>
<thead>
<tr>
<th>REPORTING OFFICER:</th>
<th>REVIEWING OFFICER:</th>
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<tbody>
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<tr>
<th>PERIOD OF REVIEW:</th>
<th>FROM:</th>
<th>TO:</th>
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<tbody>
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</tbody>
</table>

**PURPOSE OF REVIEW**

- [ ] Probation upon Appointment
- [ ] Probation Extended
- [ ] Temporary Appointment
- [ ] Review Cycle Extended
- [ ] Annual Performance Review
- [ ] Other / Specify

**SUCCESSFUL COMPLETION OF LEGISLATIVE & MANDATORY SKILL SETS (annual or as nominated)**

- [ ] Fire Safety  
  - First Response Evacuation  
  - General Evacuation
- [ ] Child Protection
- [ ] Workplace Health & Safety including:
  - Prevention & Management of Musculoskeletal Disorders
  - Material / Patient-Handling / Computer Workstation
  - Infection Prevention & Monitoring including:
  - Personal Protective Equipment
  - Hand Hygiene
  - Aseptic Non-Touch Technique (ANTT)
  - Cytotoxic Safety
- [ ] Other / Specify

**DEMONSTRATED COMPETENCE BY PEER REVIEW (annual or as nominated)**

- [ ] Code of Conduct and Formal & Official Misconduct
- [ ] HCAHPS, Facility Policies, Procedures & MUGs
- [ ] Australian Charter of Healthcare Rights
- [ ] Risk Management
- [ ] Open Disclosure
- [ ] Hazardous Materials
- [ ] Patient Assessment
- [ ] Safe Medication Administration – RN / Midwife / EN
- [ ] Communication & Customer Service
- [ ] Pressure Injury Prevention
- [ ] Cultural Diversity in Healthcare
- [ ] Other / Specify
  - Scope of Practice

**RECOMMENDATION AND / OR ACTION (based on work unit, risk assessment & individual performance)**

- [ ] Note: Annual Appraisal - Completed
  - Extend Probation to: / /
  - Extend Review Cycle to: / /
  - Confirm Appointment / Probationary Employees
- [ ] Other / Please specify
  - Resignation

**SIGNING OF THIS AGREEMENT DOES NOT MEAN THAT YOU NECESSARILY AGREE WITH ALL DETAILS OF THE APPRAISAL OR DECISIONS MADE IN RELATION TO IT.**

**EMPLOYEE: DATE: / /**

**REPORTING OFFICER: DATE: / /**

**REVIEWING OFFICER: DATE: / /**

**I APPROVE THE ABOVE RECOMMENDATIONS**

**DATE: / /**

**OFFICER WITH AUTHORITY TO CONFER OR RESCIND APPOINTMENT**

**NAME:**

**TITLE:**

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**NB: The original confidential copy of the personnel PDP Agreement is to be retained by the line manager in the employee’s facility/service working file and a copy provided to the employee. The date of completion is to be recorded on the Nursing & Midwifery facility/service database.**
Team Leader Preparation for PDP

• At initial planning meeting discuss requirements of employment regarding QG Code of Conduct and MNHHS Values

• Document demonstrated evidence of compliance with QG Code of Conduct and MNHHS Values at 6 and 12 months or as required