ELMO Team Leader User Guide - Performance and Development Portal

Commercial in Confidence

December 2022 Version 1

Contents

Understanding the Performance and Development Portal

Introduction

The Performance and Development Portal has been developed to:

- Facilitate growth by identifying goals and development opportunities to focus on.
- Maintain and encourage high standards of performance by proving opportunities for conversation related to performance and continued development regarding both personal potential and career development.
- Focus on wellbeing and engagement by providing opportunities for discussion around what impacts on your wellbeing and engagement at work

The portal has 3 key focus areas -

1. **Goals** - Development of individual goals that supports the delivery of DOBCEL'S strategic priorities (as an addendum to your key responsibilities as in your job description).

2. **Development** - An opportunity for you to set development objectives that support your personal growth and ongoing success as well as supporting the delivery of your goals; and

3. **Wellbeing & Engagement** – The opportunity to have discussions with your team leader around any supports you need or what you need to maintain your wellbeing and engagement at work.

The focus and effort should be on the 'discussion' at the check ins. The completion of the online form is merely a record of the conversation and a way to record your achievements and growth.

The process is collaborative, with you and your team member as active participants in discussion. Progress against achieving goals will be updated at the check ins and together with your team member, you'll discuss this progress and key areas of focus for ongoing growth, development and wellbeing and engagement at work.

What the Performance and Development Portal is not about -

This performance and development portal is not intended to be about completing a form. The key to a successful process is both participants planning and engaging in the conversation. The system is simply to help guide and record the conversation.

There is some language contained in the ELMO portal that is not language typically used in schools or by CEB/DOBCEL. Where possible, language has been updated to reflect terminology commonly used. However, there are some parts of the portal that are hardwired and unable to be updated, so you will come across instances of terminology such as employee, manager, appraisal, rating and reject that has been unable to be updated.

Accessing the portal and your Teams Performance and Development Planners

There are three ways you can access your teams Performance and Development Planners.

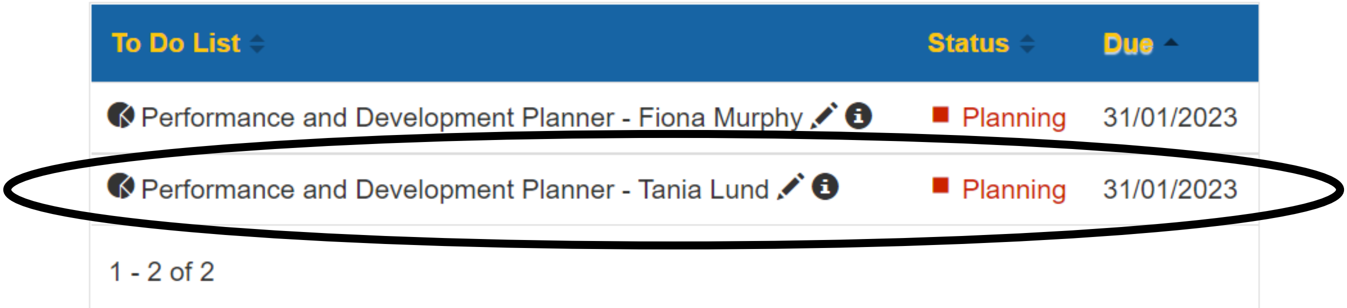
1) Via the link in your 'To Do' List.
2) On the Home page via the 'Performance' menu on the left hand side.
3) Via system generated automatic email notifications sent when an action has been completed by your team member or when you need to complete an action for your team

member. In both of these scenarios you will receive an email which will contain a direct link to the planner template.

Accessing via the To Do List

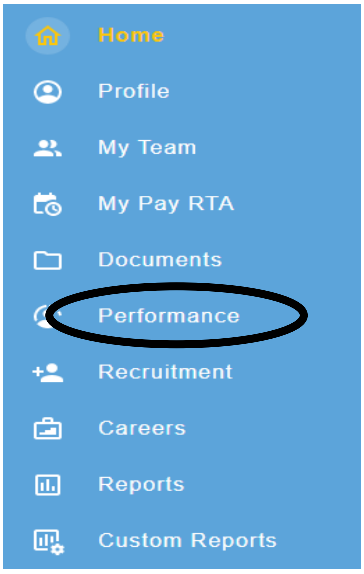
The to do list is located in the middle of the ELMO landing page.

1. Locate the performance and development planner. The team member's name will appear next to the plan title for easy reference.
2. Hover your mouse over the plan you wish to access and click to be taken to the performance and development planner.

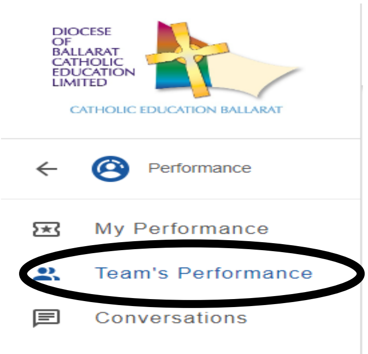


Accessing via the Performance menu

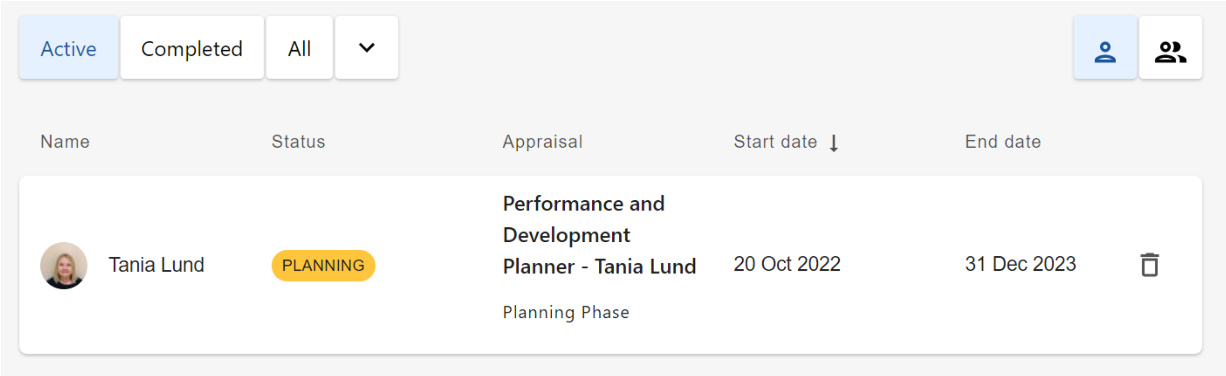
1. Click 'Performance' on the left-hand side navigational menu.



2. Click the 'Team's Performance' tab on the left-hand menu.



3. Locate the relevant performance planner and click the planner title to open.



If you are unable to locate an active planner for one of your team members this likely means a planner has not yet been assigned to that person, or the portal is not yet open. In this instance, please contact people.development@dobcel.catholic.edu.au to assist you.

Accessing via system generated email

Each time you need to action a task in the performance portal ELMO will send you a system generated email containing a link to the Performance and Development Planner. Click on the link in the email to take you directly to the planner.

My 'Team's Performance' tab -

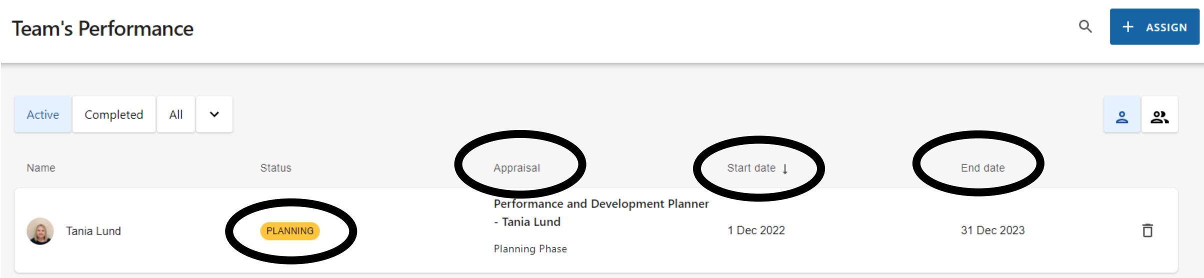
When accessing the portal via the 'Performance' tab on the navigational tool bar, you can view several details in the 'Team's Performance' tab:

Status: What status the Performance and Development planner is in (eg: Planning, In Progress, Finalise, Complete).

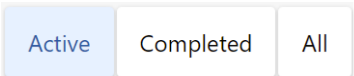
Appraisal: The title of the plan loaded.

Start Date: Date the Performance and Development Planner begins.

End Date: Date the Performance and Development Planner ends.



Note: You have the option to switch between active plans, completed plans, or all plans by clicking on the appropriate button selection.



Tip: Toggle between appraisals for Direct reports, or Direct & Indirect reports.

 *If you have no indirect reports the*  *will not contain any information.*

*An **indirect report** is anyone who does not report directly to you but sits in the team you are responsible for, for example, you may have a direct report who has someone reporting to them – that person is considered your indirect report. There is no access to people's performance and development planners unless there is a reporting relationship.*

Performance and Development Planner - Status

The Performance and Development Planner will go through four different status updates as you work through each phase. The current status appears on the team's performance tab overview.

Planning: Planning is the first status of the Performance and Development Planner. Every planner will be in planning when it is first assigned to a team member. Planning requires you and your team member to agree on goals and development objectives for the individual.

In Progress (or action phase): The Performance and Development Planner status will change to 'In Progress/Action Phase' once planning has been agreed between yourself and your team member. It will stay in this status for the duration of the planner until it is time for it to be finalised.

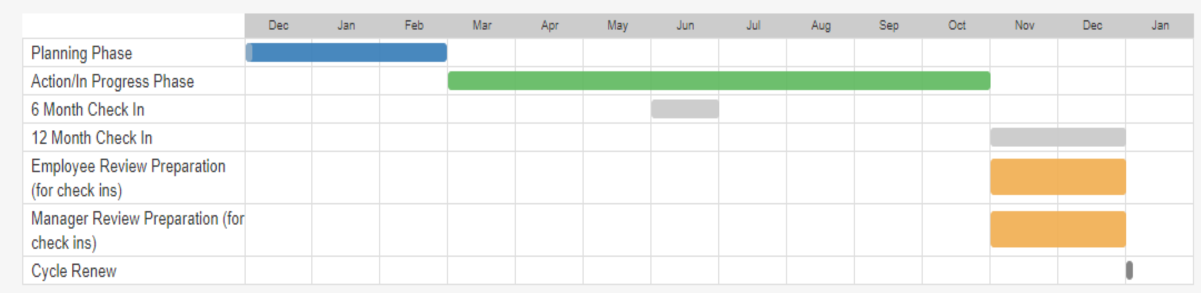
Finalisation: When the Performance and Development Planner is in the 'Finalisation' status you will need to read and acknowledge the 12 month check in, Development and Reflection Questions, updated the status of goals and have had the 12 month check in conversation with your team member.

Complete: Once all tasks are completed the planner will move into the 'Complete' status. At this point no further action is required by yourself or your team member and planning should start for the next cycle.

Performance and Development Planner - Workflow

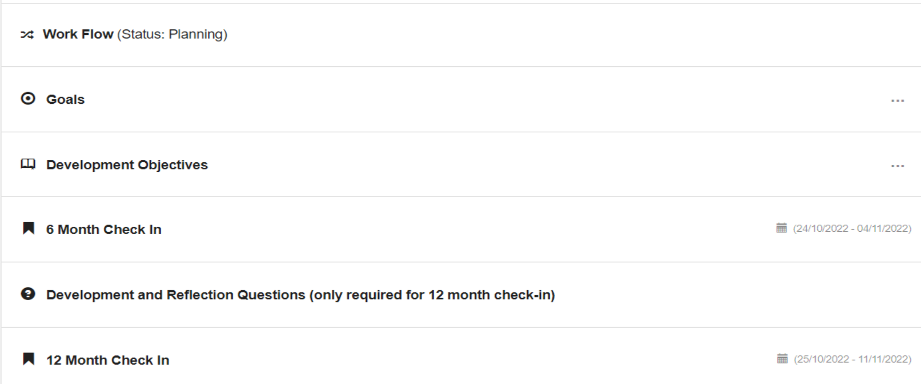
The workflow will appear near the top of the Performance planner. This provides a visual representation of the phases the Performance and Development Planner will go through. The portal is date driven and will cycle through each phase at the dates prescribed in the back end of the portal. If you ever need to override any dates or have a section of the portal open at a different time, please contact people.development@dobcel.catholic.edu.au

In addition to the phases, the workflow also highlights any check in meetings that should occur between yourself and your team leader. In this instance there are 2 check ins, one mid year and one at the end of the year.



Performance and Development Planner – Section Descriptions

Every Performance and Development Planner consists of a series of sections designed to guide you through the process.



You can expand each section by clicking on the title and you will see the actions available to you.

Goals: Goals are statements outlining a desired outcome or accomplishment and may include single or multiple measurements which are specific, measurable, and realistic. These must be aligned to the organisation's strategic priorities.

To make goal setting more streamlined, it is recommended that goal setting discussion forms part of your 12 month check in discussion every year. This will ensure that when the planning stage is in action, the goals being set have alignment to this previous discussion and both team member and team leader have had input into goals being set prior to input in the portal.

Goals are part of the planning phase.

Development Objectives: Development objectives are activities focusing on your professional development. These must be aligned to the organisation's strategic priorities.

Development objectives are part of the planning phase.

Check ins: The check in is a defined period(s) of time where you will meet with your team member to discuss how they are tracking towards achievement of goals and development objectives and discuss any questions that might be attached to that specific check in.

The 6 month check in occurs during the in progress (action phase).

Skipping check ins: It is important to have scheduled check-ins with your team member however in some circumstances such as long service leave or maternity leave this may not be possible. If for some reason you need to skip a check in please contact people.development@dobcel.catholic.edu.au

Development and Reflection questions: Development and Reflection Questions are open ended questions for your team member to answer as part of the 12 month check in process.

The Development and Reflection Questions, 12 month check in conversation and updating goal progress are all part of finalisation.

Completing tasks in the Performance and Development Planner

This section covers the phases in the order that your team members performance and development planners will follow.

Planning

The planning phase is an opportunity for your team member to capture any goals carried over from the previous year and/or create and set new goals. Each goal must support one of the organisation's strategic priorities.

Along with setting goals, the planning phase also contains a development objectives section. This section is dedicated to your team members ongoing development and captures actions required to aid their development. Development objectives are required to be linked to one of the organisational priorities.

When your team member submits the planning phase for your approval you will receive an automatic email advising you that you are required to approve the planning phase.

As a team leader, if you feel something is missing from your team members goals or development objectives, you have access to add, edit, and delete goals and objectives once the team member has sent you their planning phase (goals and development objectives) for approval. You can also reject goals if necessary. There is further information on this below.

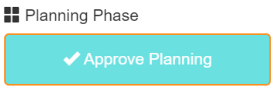
Approving the Planning Phase (approving goals & development objectives)

Once your team member has submitted their planning phase (goals and development objectives) you are required to review and approve the phase.

To do this -

1. Access the team member's Performance and Development Planner.
2. Review the current goals & development objectives. If required, you can amend goals/development objectives. If you are amending anything, consider having a conversation with your team member before doing editing or amending.
3. Once you have reviewed the planning section and agree with the contents click the 'approve planning' button on the right-hand side of the page.

Approve Planning



4. You will be prompted to confirm your finalisation of the Planning Phase.
5. Once confirmed, the Performance and Development Planner will move to the next phase.

Suggesting amendments or rejecting goals and development objectives –
As team leader, if you would like to suggest edits and view those edit prior to approving, you can reject the planning phase, by clicking on the 'reject' planning phase button (which is located next to the approve planning button).

If you would like to make comments but do not need your team member to update the goals/development objectives, simply make your comments and approve the planning phase.

If you are in a situation where you feel the goals or development objectives submitted need amendments, or you would like your team member to add in additional information and would like your comments considered and incorporated into the goals or development objectives you will need to reject goals to give you team member an opportunity to update the goals or development opportunity. It is recommended prior to using the reject button, you have a conversation with you team member about the goals/development objectives and outline the amendments you believe are appropriate for the team member's goals/development objectives. After this conversation you can then use the reject button, so the Performance and Development Planner reverts back to your team member to update.

If you do use the reject button, the portal will ask you to supply a reason for the rejection which will be sent to the team member.

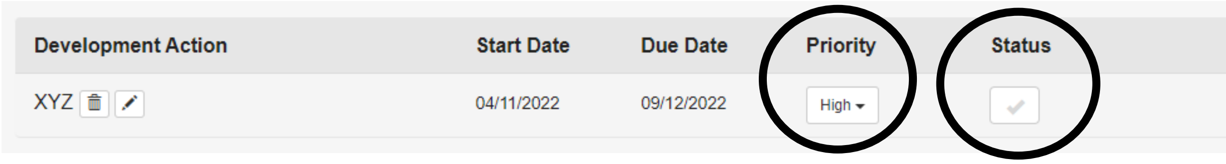
If you would like some assistance regarding the need to have a conversation with your team member about rejecting goals and development objectives, please contact Fiona Murphy, on fmurphy@dobcel.catholic.edu.au or 0447 371 177.

Assigning Goals & Development Objectives

If you feel that there is a goal or development objective missing from your team member's planner, you have the ability to add these in. If you would like to add something additional in, it is recommended you have a conversation with your team member prior to adding in the additional information.

Adding Development Items

1. Expand the development objectives section of the planner.
2. Click +add development to add development objective.
3. Enter in the development objectives details.
    a. *Development Objective Name:* Name of the development objective
    b. *Label:* Organisation strategic priority the development objective is aligned to
    c. *Description:* Brief description of the development objective
4. Development actions can be added by clicking +add development action (this is the training or task that needs to be performed to achieve the development objective).
5. Select text only in the type drop down box.
6. Click save
7. Select the priority (high, medium, low)
8. The status box can be clicked to enable the tick when the action is completed



Adding Goals

1. Expand the goal section of the planner.
2. Click +add goal.
3. Enter in the goal details.
    a. *Goal Title:* Name of the goal
    b. *Label:* Organisation strategic priority the goal is aligned to
    c. *Goal Description:* Brief description of the goal
4. Measurements can be added by clicking +add new measure (this is how you are going to achieve the goal, should be quantifiable/measurable)
5. Click save

Tip: You can make goals into development objectives by selecting Yes from the Is development required? drop down menu.

Editing & Deleting Goals & Development Objectives

During the planning stage you can make edits or amendments to your team members goals or development opportunities. It is recommended if amendments are required, you have a conversation with your team member directly regarding the updates before changing/updating sections without consultation.

If you want to edit or remove content, look for the pencil or the bin icon as these are indicative that you have access to make edits.

Edit Button

Delete Button

Once you have reviewed and agreed with your team members planning phase, the portal requires you to approve the planning. See the above '<u>approving the planning phase'</u> instructions. When you approve the planning phase, your team member will receive a system generated email advising them the planning phase has been finalised and approved.

Action Phase

Once you have approved the planning phase, the planner will automatically move into the action phase. The action phase is the period where your team member is working towards achieving their goals and development objectives.
At this time there is no further action required from you in the portal until the 6 month check in period.

As a team leader, you will still have access to view your team member's Performance and Development Planner and add notes and attachments during this phase.

Viewing 6 &12 month check ins

Check ins are scheduled conversations between you and your team member to discuss how they are tracking towards achieving their goals and development opportunities. There are two check ins that occur during the action phase. These check ins have built in questions to guide the discussion; however, this is also your opportunity to ask questions, seek updates and discuss your team members responses from the pre-determined questions. You should also prepare feedback to provide to your team member on their progress and their development during these check ins.

What's required for the check ins?

6 month check in - For the 6 month check in (completed in June of each year) you and your team member are required to complete the 6 month check in questions.

12 month check in - For the 12 month check in (completed in November/December of each year) you and your team member are required to complete the Development and Reflection Questions, 12 month check in questions and update the progress of goals in the goals section.

Viewing Check-ins

When your team member has submitted their responses, you will get a notification email advising that your team member's check in has been completed and you will be able to view their responses. The most effective check ins occur when you have reviewed your team members feedback and prepared your own feedback prior to the check in meeting.

How to view check ins -

1. Access the team member's performance and development planner.
2. Expand the check in section. (Either the 6 month check in due in June or 12 month check in due in Nov/Dec).
3. Review your team member's responses. Your option here is to accept or reject your team members comments.

Suggesting amendments to check ins –

As team leader, if you would like to suggest edits and view those edit prior to approving, you can reject the check ins, by clicking on the 'reject' button.

If you would like to make comments but do not need your team member to update their responses, simply make your comments and approve the check in.

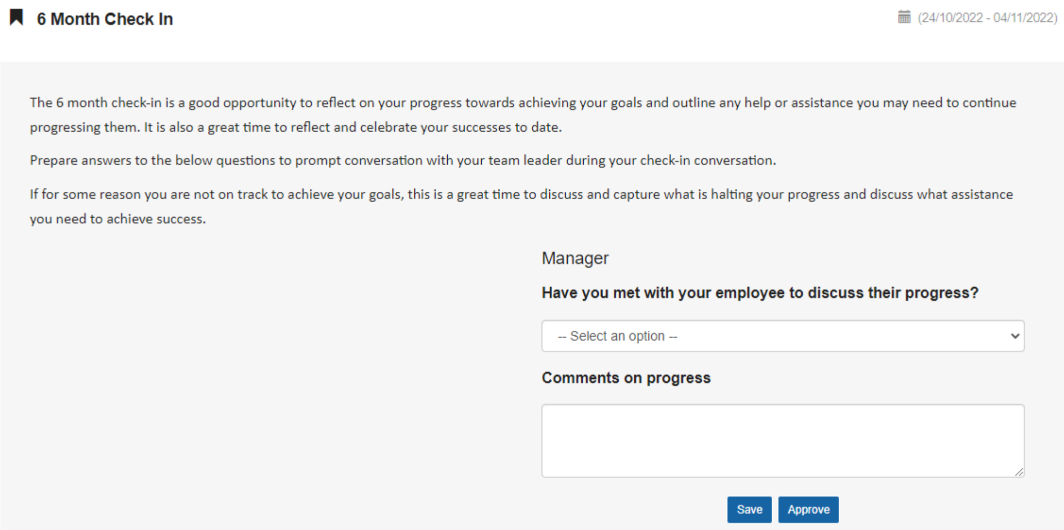
If you are in a situation where you feel the comments submitted need amendments, or you would like your team member to add in additional information and would like your comments considered and incorporated into the responses you will need to reject check in to give you team member an opportunity to update this. It is recommended prior to using the reject button, you have a conversation with you team member about the check in responses and outline the amendments you believe are appropriate. After this conversation you can then use the reject button, so the check in reverts back to your team member to update.

If you do use the reject button, the portal will ask you to supply a reason for the rejection which will be sent to the team member.

If you would like some assistance regarding the need to have a conversation with your team member about check in comments, please contact Fiona Murphy, on fmurphy@dobcel.catholic.edu.au or 0447 371 177.
Note: Check ins are open to complete during pre-determined dates (6 month check in - 1 June – 30 June and 12 month check in - 15 November – 31 December of each year). Your team member will receive an automatic email advising when the portal is open to prepare for check ins.

Approving check ins

1. Access the team member's performance and development planner.
2. Expand the check in section. (Either 6 month check in due in June or 12 month check in due in Nov/Dec).
3. Enter your responses to the check in questions (below is an example of the 6 month check in).



4. Use the Save button if you enter any information but would like to review the check in at future time prior to approving it.
5. Use the approve button if you have completed both sections and would like to approve the check in. Using the approve button will save and approve the check in. After hitting the approve button, you will be prompted to confirm that you want to approve and submit the check in. Click yes, if you want to approve.

Development & Reflection Questions (required for 12 month check in only)

Development and Reflection questions are open ended questions which are available for update during the entire Performance and Development Planner period.

As the team leader there is nothing for you to 'approve' or submit/answer in this section, however, you should review your team members responses and they should help guide your 12 month check in conversation regarding your team member's development and their contributions to the organisation throughout the year.

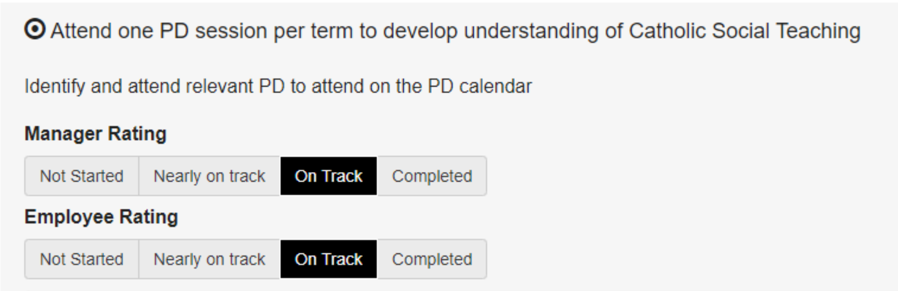
Updating the progress of goals (required for 12 month check in only)

As part of the 12 month check in, you are also required to provide a progress update on your team members goals. The progress update requires you to assign one of the following updates to each goal in the goals section of the planner -

- Not started
- Nearly on track
- On track
- Completed

The status update buttons will not be available until the 12 month check in opens in November of each year. When the 12 month check in opens the goal progress update table will be available for completion by the team member and the team leader. See below example.

Example:



When you have assigned a progress update to each goal you will need to save these updates using the approve rating button on the right hand side of the page. This is the final step in the portal to complete the 12 month check in.

Once the Performance and Development Planner is finalised and all sections submitted and approved, the status of the planner will update to Complete. See cycle renew for more information if required.

Notes & Attachments

Notes and attachments allow you and your team member to add additional supporting or supplementary information to the planner. They can be added to any goals, development objectives or questions. This can include notes on progress, and attachments containing supporting documentation such as feedback received internally or by stakeholders.

When adding notes and attachments you will be prompted to select who has access to view this information:

1. **Public:** Any person who has access to your planner can view the note. In the case of our set up only you, your team member and your manager can see the Performance and Development Planner.
2. **Manager Only:** Yourself and your team member are the only ones who can see this note or attachment.

Adding Notes

1. Click +add note.
2. Enter in the details/text for your note.

3. Select the visibility (public/private/manager only).
4. Click Save.

Adding Attachments

1. Click **+**add attachment.
2. Enter a file name (this is the display name for your file).
3. Click choose file.
4. A pop-up window will appear. Locate the file you want to attach by browsing to the location on your computer.
5. Click the file you want to attach and then click open.
6. Select the visibility (public/private/manager only).
7. Click save.

Editing & Deleting Notes & Attachments

1. Click the bin icon next to your note or attachment to delete it. This cannot be undone.
2. Click the pencil icon next to your note or attachment to edit it.
3. Once all changes are made click save.
4. The date and time of the note/attachment will update to the date you edited it.

Email notifications

Each stage of the Performance and Development Planner will trigger an email notification advising you of any tasks needing completion. You will also receive reminders when check-in responses are open and when they are due to be submitted.

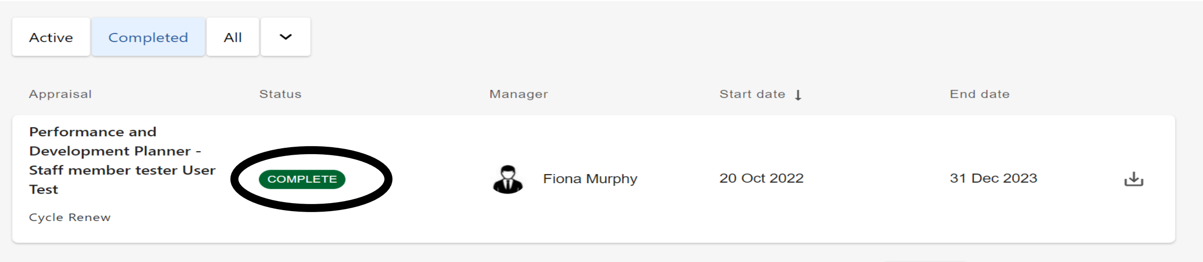
Cycle renew

Once you have approved all phases of the Performance and Development Planner across the yearly cycle, the status will update to complete, and the cycle will renew allowing your team member to plan new goals for the following year.

Before the planner can update the status to complete, all below stages need to be completed and approved in the yearly cycle –

- Goals
- Development objectives
- 6 month check in
- 12 month check in
- Development and Reflection Questions
- Goal progress updates

Example of status update to complete -



Questions?

Please contact people.development@dobcel.catholic.edu.au if you have any questions.