ELMO Employee 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 leader/manager as active participants in discussion. Your progress against achieving goals will be updated at the check ins and together with your team leader, you'll discuss your progress and key areas of focus for ongoing growth, development, and your 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 portal 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 may 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 Performance and Development Planner

There are three ways you can access your Performance and Development Portal

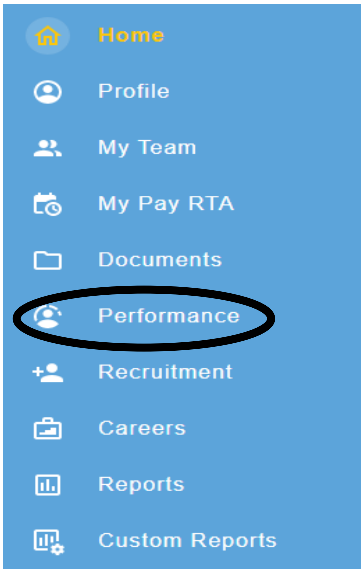
1) Via the link in your 'To Do' List.
2) On the Home page via the 'Performance' menu on the left hand side.
3) Via system generated automatic email notifications sent when a phase is open for action or reminding you to action a phase. In both scenarios you will receive an email which will contain a direct link to the plan template.

Accessing via the To Do List

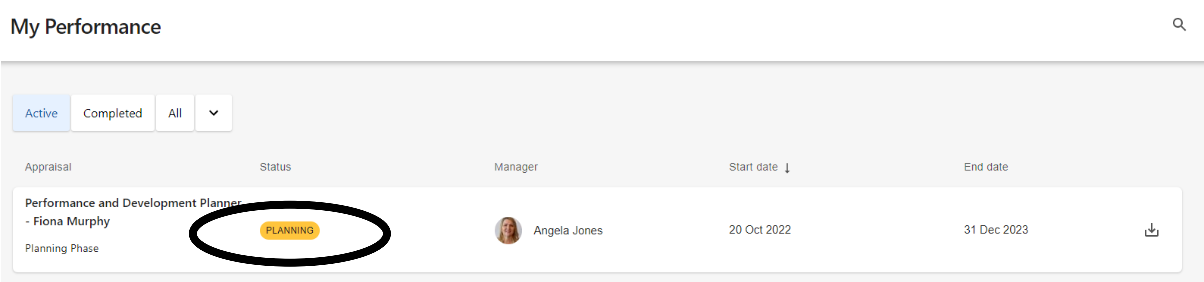
The to do list is located in the middle of the ELMO landing page.

1. Locate the performance and development planner underneath the to do list banner.
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 on 'Performance' on the left hand side navigational menu.
2. All assigned planners will appear in the 'My Performance' tab, with the option to view all planners, active planners, or completed planners.
3. Click on planning to open the Performance and Development Planner.



*If you cannot see a planner in your to do list or via the left-hand navigation menu, this means a planner has not yet been assigned to you, or the portal is not yet open. In either 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 Performance tab

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

Appraisal: The title of the plan loaded.

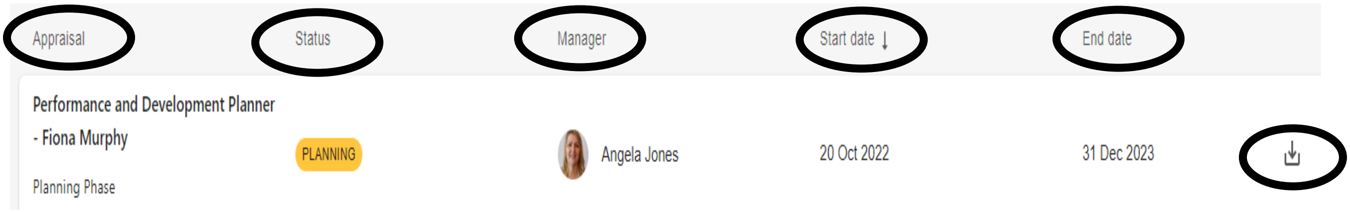
Status: What status the Performance and Development Planner is in (eg: Planning, In Progress, Finalise, Complete).

Manager: The team leader assigned to your Performance and Development Planner. This can be different to your day-to-day operational leader, but in most cases will be you team leader.

Start Date: Date the Performance and Development Planner begins.

End Date: Date the Performance and Development Planner ends.

Export: Button that allows a PDF export of your Performance and Development Planner.



Performance and Development Planner - Status

Your Performance and Development Planner template will go through four different status updates as you work through each phase. The current status will appear on the 'My Performance' tab overview and in brackets in the workflow section once you have opened the planner.

Planning: When your Performance and Development Planner first opens it will be in the planning phase. During this time, you and your team leader are agreeing to your goals and development objectives.

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

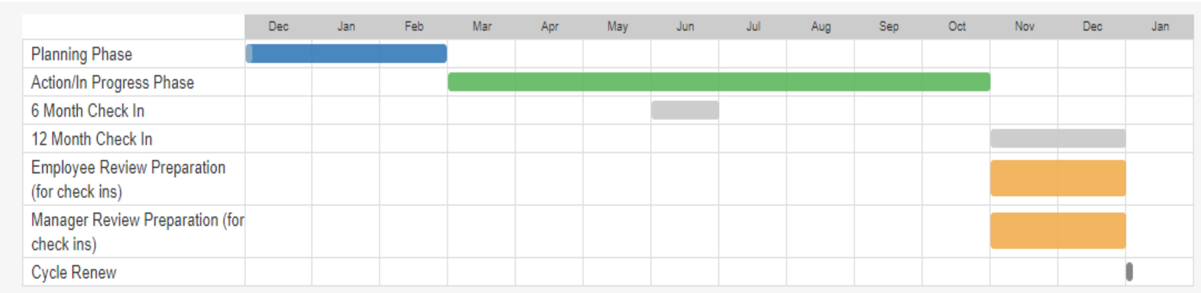
Finalisation: When your Performance and Development Planner is in the 'Finalisation' status your team leader will need to read and acknowledge your 12 month check in, Development and Reflection Questions, updated the status of goals and have had the 12 month check in conversation with you.

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

Performance and Development Planner - Workflow

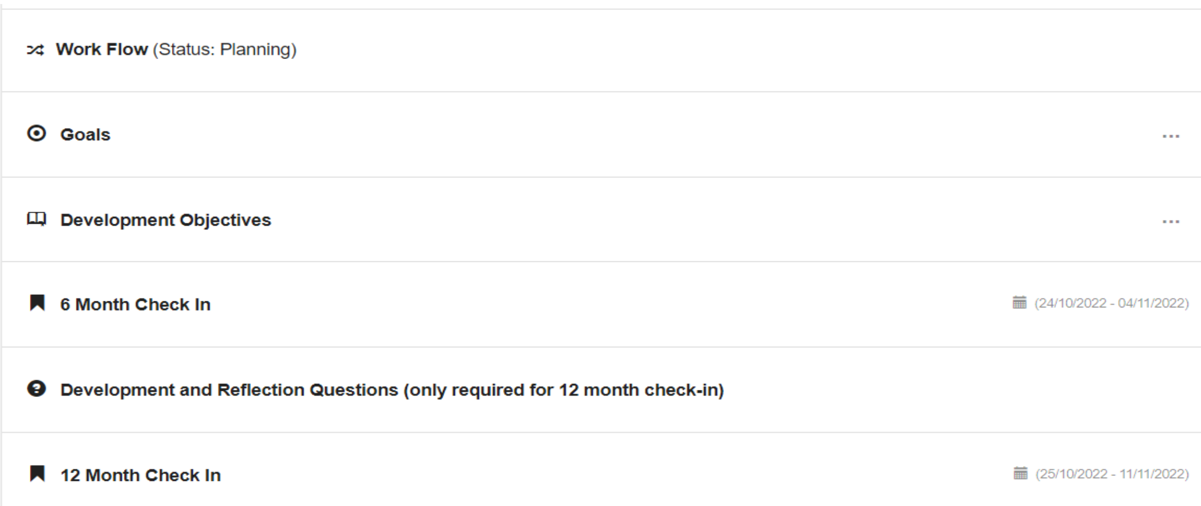
The workflow will appear near the top of the Performance planner. This provides a visual representation of the phases your planner will cycle through and the status. The portal is date driven and will cycle through each phase at the dates prescribed in the back end of the portal. If you ever need to override any of these 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 to show you what actions available.

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 suggested 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: Defined period(s) of time where you will meet with your team leader to discuss how you 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).

Development and Reflection Questions: Development and Reflection questions are open ended questions for you 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 stages are all part of finalisation.

Completing tasks in the Performance and Development Planner

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

Planning

The planning phase is an opportunity for you to carry over any goals 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 ongoing development and captures actions required to aid your development. You are also required to link your development objectives to one of the organisational priorities.

Once you have entered in your goals and development objectives, you will submit these to your team leader for review and approve in the portal.

Your team leader should review your goals and development objectives and approve if they have no amendments to suggest for your goals and development objectives. If there are suggested amendments, your team leader can make edits directly in the portal themselves. If they would like goals updated (rather than comments just noted in portal) your team leader will need to reject your planning phase, which sends the planner back to you to make edits.

If your team leader rejects your goals, you will receive a system generated email advising you of this together with the reason so you can edit/update the goals/objectives section.

If, for some reason, you are unsure why your planning phase has been sent back to you for amendments, the best person to speak with is your team leader.

Assigning Goals & Development objectives

Adding Goals

1. Expand the goal section of the planner.
2. Click +add goal.
3. Enter in the Goal details.
    a. *Goal Title:* Name 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.
6. Once you click save a prompt will appear asking is development required. You can select yes or no to this question. (See example below)

<u>Example Goal</u>

Conduct Monthly Team Meetings

Is development required? No

Improve team communication by scheduling and running effective monthly team meetings.

- Prepare agenda for each meeting in advance
- Conduct monthly meetings
- Run meetings effectively
- Document minutes of meetings

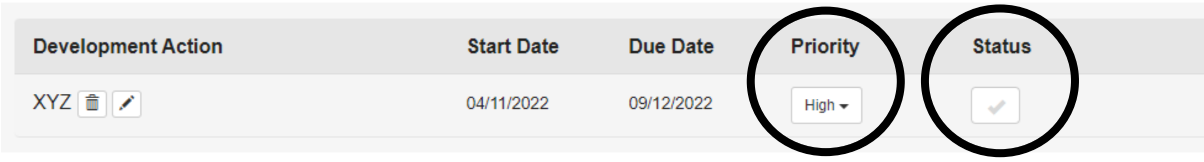
<u>Example Measure</u>

Measure	Start Date	Due Date	Status	Complete
Keep a record of all meetings scheduled, including agendas, attendees, action items, and any other minutes	15/01/2020	30/11/2020	Status	0%

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 and add in details.
6. Click save
7. Select the Priority (high, medium, low)
8. The status box can be clicked to enable a tick when the action is completed – this can be updated during the year.

Example



*Remember: You can add goals into your development objectives by selecting **Yes** from the **Is development required?** drop down menu. If you select yes, this will automatically add the item into your development objectives.*

Editing & Deleting Goals & Development Objectives

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

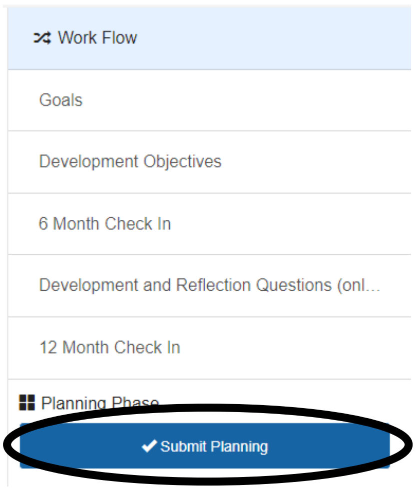
Edit Button

Delete Button

Submitting planning (submitting goals and development objectives)

Once you have completed your planning, the portal requires you to submit it to your team leader for their review.

1. Once you are satisfied with your planning (goals and development objectives) click Submit Planning on the right-hand side workflow.



2. You will be prompted to confirm your submission.
3. Once confirmed, your planning will go to your team leader for their review.
4. The portal requires your team leader to 'approve' the planning phase and move the planner to the action phase. If your team leader wants to suggest some amendments to your goals or development objectives, they will be able to send the goals back to you so you can make amendments and re-submit. If this occurs, you will receive an email notification.

5. If you are unsure why your goal planning has been sent back to you for amendments, the best person to speak with is your team leader.

Once your team leader has approved your planning phase you will receive a system generated email advising you the planning phase has been finalised and approved.

Action Phase

Once you have submitted and your team leader has approved the planning phase, the planner will automatically move into the action phase. The action phase is the period where you are working towards achieving your goals and development objectives.

During this time, you can use the portal to update the status of any goals/objectives, add any relevant notes or attachments, and visit any question sections.

At this time there is no further action required from you in the portal until the 6 month check in period.

6 Month & 12 month check in Phases -

Check ins are scheduled conversations between you and your team leader to discuss how you are tracking towards achieving your 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 responses with your team leader from the pre-determined questions.

What's required for the check ins?

6 month check in - For the 6 month check in (completed in June of each year) 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 are required to complete the Development and Reflection Questions, 12 month check in questions and update the progress of goals in the goals section.

Completing and submitting 6 & 12 month check ins

The 6 and 12 month check ins have built in questions to help guide the check in discussion; however, this is also your opportunity to ask questions, provide updates to your team leader, get feedback on your progress as well as discuss your development.

The most effective check ins occur when you access and complete the check-ins questions and submit to your team leader prior to meeting for the face to face conversation.

How to access and submit check ins:

1. Access your performance and development planner by clicking Performance on the left-hand side navigational menu.
2. Expand the check-in section.
3. Enter your responses to the check in questions.
4. Click save and submit. If you would like to review your comments and submit at a later date, you can click save instead of save and submit.
5. Once submitted, your team leader will review your responses. If your team leader would like to suggest amendments or additional information be added into your responses they can make these comments in their comment box or reject the check in and provide

you with feedback on their suggested amendments for you to capture and re-submit for approval.

6. Your team leader can enter in their own comments which you can view in your Performance and Development Planner.

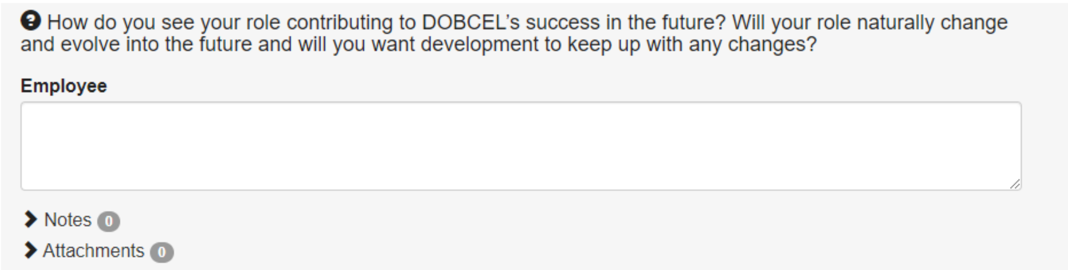
A check in conversation with your team leader is necessary at both the 6 & 12 month check in points.

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. You can add information to the questions or to notes and attachments at any time during.

Your answers to these questions should help guide your 12 month check in conversation about your development and contributions to the organisation.

<u>Example question</u>



Whilst there is no submit button for this section you are required to complete this section as part of your 12 month check-in and your team leader will be able to access your responses.

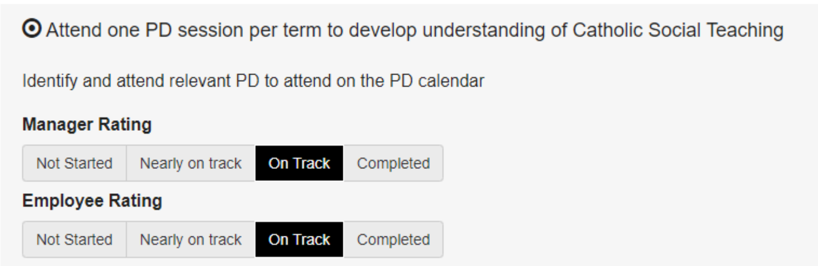
Updating the progress of your goals (required for 12 month check in only)

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 available for completion by the team member and the team leader. See below example.

Example:



Once you have updated the progress of your goals you will need to hit the approve ratings button on the right-hand side of the page. Your team leader will also update the progress of your goal. 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.

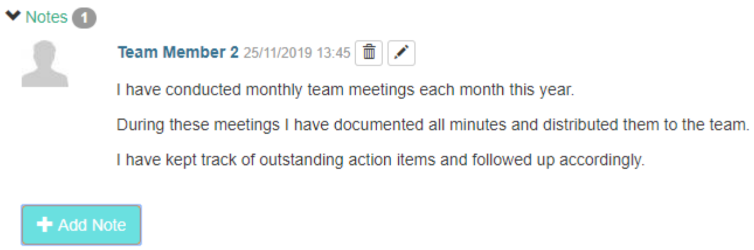
Notes & Attachments

Notes and attachments facilitate adding additional supporting or supplementary information to your planner. They can be added to any goals, development objectives or development and reflection questions. This can include notes on your progress, and attachments containing supporting documentation such as positive feedback you have received from stakeholders or colleagues or other related documents.

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 leader and your team leader's manager can see the performance and development planner.
2. **Private:** You are the only person who can see this note or attachment.
3. **Manager Only:** Yourself and your team leader are the only ones who can see this note or attachment.

<u>Example Note</u>



<u>Example Attachment</u>

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.

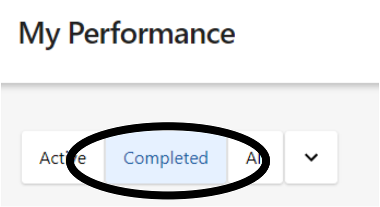
Cycle renew

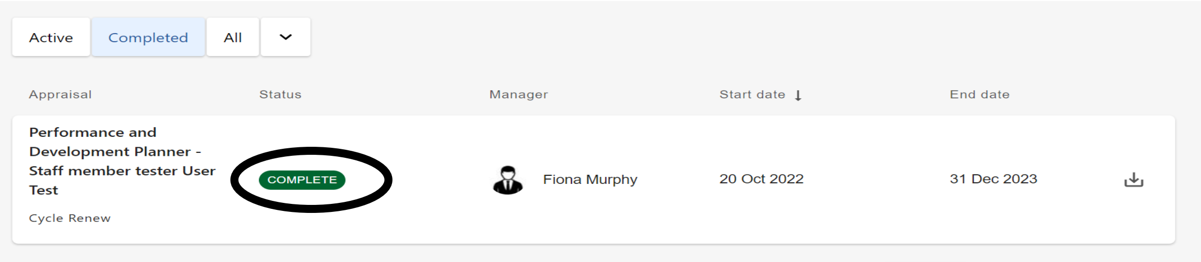
Once you have approved all phases of the Performance and Development Planner across the yearly cycle, the status will update to complete, and the cycle will renew allowing you to plan new goals for the following year.

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.