

APPENDIX A

Example of a Performance Appraisal Form

example only

**PERFORMANCE MANAGEMENT SYSTEM FOR THE
GOVERNMENT OF xxxxxxxxx**

PERFORMANCE APPRAISAL FORM

This form is part of the Performance Management System for the Government of xxxxxxxxxx.

Before commencing the form, supervisors and managers should refer to the Performance Management System Guidelines.

The Performance Management System provides agreement on work objectives and performance measures, ongoing monitoring and feedback on progress, identification of skill development needs and annual appraisal based on performance.

PERIOD OF REVIEW: From: _____ To: _____
NAME: _____
POSITION: _____
PAYROLL NUMBER: _____
DEPARTMENT/MINISTRY: _____
SUPERVISOR _____
SUPERVISOR'S POSITION _____

The form is confidential between the employee, supervisor and senior management, as required. During the review year the original is held by the supervisor and a copy by the employee. At the completion of the appraisal, the form is kept on the employee's personal file.

WORKPLAN

To be agreed between the supervisor and the employee at the start of the annual appraisal cycle, or when a new employee commences.

Key Job Accountabilities <small>Drawn from job description and department's goals.</small>	Objectives <small>Results to be achieved. Should be specific, measurable, attainable, realistic and time framed.</small>	Performance Measures <small>How you will know that results have been achieved. Include targets and measures of quantity and quality.</small>	Additional Skills <small>Any additional skills required to achieve objectives.</small>
	<i>example only</i>		

Workplan Agreed

Supervisor's Signature: _____

Employee's Signature: _____

Date: _____

example only

Career Development Comments and Plan

Completed by the supervisor in discussion with the employee.

Employee's Comments

Signature

Date: _____

Next Level Manager's Comments (If Required)

Signature

Date: _____

APPENDIX B

Example Guidelines

example only

It should be noted that this document is an example to assist you. Details in relation to each section of your performance management guideline require development in line with the unique environment and needs of the particular Government or organisation.

PERFORMANCE MANAGEMENT SYSTEM FOR XXXXXXXXXX GUIDELINES

example only

1. INTRODUCTION

This Government (*or organisation*) is committed to becoming increasingly efficient, cost effective, and responsive to the public in all aspects of its operations.

To achieve this change a program of structural, policy and management reform is now underway. A major element of the reform program is the introduction of a new performance management system.

This system aims to develop a performance culture in the organisation by:

- linking the tasks of each employee to the overall objectives of the organisation;
- providing processes for improved work planning;
- identifying and prioritising training and development needs of employees;
- encouraging better communication and understanding of work expectations between employees and supervisors;
- encouraging the early identification and turnaround of unsatisfactory performance;
- recognising and rewarding outstanding performance.

example only

2. WHAT IS PERFORMANCE MANAGEMENT

Performance management is an organisational approach to improve performance by aligning planning and management. It links corporate planning and budgetary cycles and plans to division, team and individual work planning, training and reward and recognition activities. It promotes non blame related problem solving, employee empowerment and the development of a performance culture.

Performance management incorporates:

- corporate and strategic planning to define the long and short term aims and values of a particular organisation;
- translation of these into operational plans for the organisation and each division, and workplans for each individual;
- assessment and provision of training and other resources based on the priorities identified in the planning phase;
- development of appropriate measures of performance at the level of the organisation, the division and the individual;
- regular review, adjustment, feedback and recognition of achievement.

The diagram below illustrates elements of performance system activities :

example only

PERFORMANCE MANAGEMENT ALIGNING PLANNING AND MANAGEMENT

GOVERNMENT PRIORITIES

key government objectives



BUDGET ALLOCATIONS

prioritised resources in line with government objectives



ORGANISATION'S GOALS/OBJECTIVES

what the organisation needs to achieve to meet government objectives



STRATEGIC & ANNUAL PLAN ACTIONS

how the objectives will be achieved



UNIT ACTION PLAN

how particular units will operationalise the annual plan



INDIVIDUAL WORKPLAN OBJECTIVES OR KEY TASKS

how each individual will work towards objectives

PERFORMANCE MEASURES/INDICATORS/TARGETS

Measures at each planning level to indicate task completion/success
and allow appropriate feedback and adjustments.

example only

3. OBJECTIVES OF THE PERFORMANCE MANAGEMENT SYSTEM

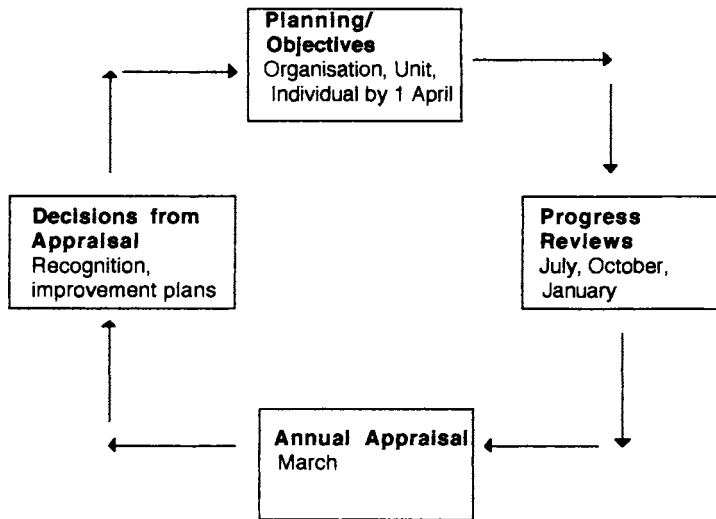
The objectives of the performance management system for the Government (*or organisation*) are:

- to ensure that individual's tasks and priorities are in line with the organisation's objectives;
- to improve planning and work processes for improved productivity;
- to identify skill training and career development needs;
- to foster ongoing communication, coaching and feedback between supervisors and employees;
- to review individual performance objectively against agreed standards;
- to recognise and reward good performance.

example only

4. HOW DOES THE PERFORMANCE SYSTEM WORK EACH YEAR?

The performance management system is an annual cycle of planning, objective setting, coaching, appraisal and feedback.



example only

5. PLANNING

Ministry and Division

As part of the budget allocation activities, Ministers and senior management meet during October and November to decide on Government and departmental priorities and objectives. These meetings are followed by meetings in each department when senior management bring their unit heads together to develop plans to allow the Government's objectives and priorities to be met.

Units

During March unit heads meet with their staff to discuss the department's objectives and how the unit's work can be aligned to meet these objectives. Discussion also takes place during the unit meeting on any objectives staff may have in common and consideration is given to appropriate performance measures and targets for these objectives.

Individual Workplan Development

Following unit planning, or when an employee joins the unit, the supervisor arranges an individual workplan development meeting.

The appraiser sets aside a time for the meeting, gives the appraisee advance notice and ensures they have a copy of the performance management appraisal form and guidance note.

Both prepare for the meeting by considering the objectives of the unit, the responsibilities detailed in the individual's job description, and what should be the priorities and team and individual tasks for the year.

During the workplan meeting the supervisor and the employee draw from the job description the employee's key job accountabilities for the year, taking into account the department's priority objectives.

They then develop objectives to be achieved relating to each key accountability area. The objectives are expressed in a way that details what will be achieved, when, and to what level or standard.

For each objective, details of how success will be measured ie performance measures are also developed.

example only

Consideration is also given to whether any additional skill development is required by the employee to allow them to achieve their objectives, and plans are made for this development.

The workplan form page of the performance appraisal form is fully written up, following the meeting, and signed by the supervisor and employee.

An example of a completed workplan is given at the back of this guideline.

Confidentiality of the Performance Appraisal Form

The performance appraisal form is confidential between the employee, supervisor and senior management as required. During the review year the original is held by the supervisor and a copy kept by the employee. At the completion of the appraisal, the form is kept on the employee's personal file.

example only

6. REVIEWING PROGRESS

While performance management promotes a climate of continuous feedback, quarterly progress reviews provide opportunity to allow for changed priorities, coaching, problem identification and resolution, and early turnaround of unsatisfactory performance.

In July, October and January the supervisor arranges to meet with each employee to consider progress in relation to workplan objectives.

Any changes to workplan objectives are detailed on the progress review page of the Performance Appraisal Form, together with details of strategies for resolution of any performance difficulties identified.

The supervisor and employee complete and sign the appropriate progress review section of the form.

example only

7. THE ANNUAL PERFORMANCE APPRAISAL

The supervisor gives the employee at least one weeks notice of the appraisal meeting, sets aside sufficient uninterrupted time, considers the appraisee's performance and makes notes as to what they consider the performance recommendation should be.

Prior to the meeting, the supervisor ensures they fully understand the performance appraisal processes and the relationship of the performance rating scale to the achievement of objectives as described on the performance appraisal form.

The employee also considers how well they have achieved their objectives and what rating is appropriate. They should note down details of achievements to bring forward in the appraisal meeting.

During the meeting each objective and how well it has been achieved is discussed in turn.

The supervisor then indicates to the employee what the supervisor comments and proposed ratings are. Further discussion may then occur.

The supervisor then completes the comments and ratings section of the form and the employee completes the employee comments section.

example only

8. DECISIONS FROM THE PERFORMANCE APPRAISAL

Lack Of Agreement

If the appraiser and appraisee cannot reach agreement on the workplans and/or the rating of performance, the appraiser refers the discussion to the appropriate next level manager.

Dealing with Unsatisfactory Performance

It is expected that as part of their role, managers and supervisors will monitor work progress and provide day to day assistance for employees.

The progress reviews of the performance management process provide valuable opportunities to formalise this process, to recognise performance problems and to provide coaching, counselling and other remedial strategies at the earliest opportunity.

For employees who meet minimal requirements or fail to meet requirements at the annual appraisal, a performance improvement plan should form part of the next annual work plan.

The performance improvement plan should clearly identify required areas of improvement and expectations and strategies for improved performance.

example only

WORKPLAN

To be agreed between the supervisor and the employee at the start of the annual appraisal cycle, or when a new employee commences.

<p>Key Job Accountabilities <i>Drawn from job description and department's goals.</i></p>	<p>Objectives <i>Results to be achieved. Should be specific, measurable, attainable, realistic and time framed.</i></p>	<p>Performance Measures <i>How you will know that results have been achieved. Include targets and measures of quantity and quality.</i></p>	<p>Additional Skills <i>Any additional skills required to achieve objectives.</i></p>
<p>To carry out organisational reviews.</p>	<p>To review provision of hospital outpatient services and prepare a report with recommendations for improvement.</p>	<p>Report prepared and completed by 30th June.</p>	<p>One week's training with Government statistician required.</p>
<p>To train junior staff in the section.</p>	<p>Produce and conduct a training programme on review methods for section staff.</p>	<p>Report recommendations 50% accepted. 2 training sessions conducted for 20 employees by 30 September. 80% of participants rate course at 4 or better.</p>	
<p>To ensure all position vacancies are filled</p>	<p>To arrange advertising, selection committees and appointment of recommended candidates.</p>	<p>Vacancy rate to be no more than 10% throughout the year.</p>	

Workplan Agreed

Supervisor's Signature: _____ Employee's Signature: _____ Date: _____

**THE TRANSITION TO PEOPLE
PERFORMANCE MANAGEMENT**

**Review of Performance Assessment and Reward for
Victoria Public Service Non-Executive Staff
May 1996**

SYNOPSIS

The performance-related pay band strategy for the Victoria Public Service non-executive structure was introduced in 1994. The objective was to assist in implementing Government's work reform objectives for the Victoria Public Service, particularly in relation to:

- More efficient organisation of work
- Development of a culture of reward based on performance
- The introduction of employment agreements

This review was undertaken to provide an overview of the performance assessment and reward aspects of the system, including identifying issues and systems features. The aim was to inform what needs to be done in the future. The major issues, and possible responses to them based on re-alignment of systems features, are the focus of the Review Report. However, some of the possible changes will be constrained by the two-year agreements that are currently being made. The possible responses to issues have therefore been presented with this in mind.

KEY FINDINGS

- Departmental approaches vary. All departments have a rating scale to determine performance pay. One department, in some instances, pays performance pay as a lump-sum. Three departments use control point within the pay band – this divides the band into two zones to allow more planning control over performance appraisal and pay.
- Most departments have some form of performance standard for band levels and the major work boundaries or job families of the department. These were developed with reference to the National Competency Standards.

- The distinct exception is the Department of Premier and Cabinet's model. This requires continuing performance improvement at the level of the individual for performance pay to continue to be paid from one year to the next.
- Moderation of performance pay outcomes occurs in virtually all departments from a corporate perspective.
- The links between business planning and performance planning need further development.
- Most departments have instigated significant training and development of staff and managers in support of the system.

KEY ISSUES

The Contribution of the Performance Pay Systems to Continuous Improvement

The basis of payment needs further consideration. At present, apart from across-the-board pay band adjustments, increased payment can only be made by departments through annual performance assessment. Government policy requires payment to be made only for performance that is above adequate (that is, above the level for which individuals are paid to do a job). However, it should be stressed that even where performance pay is only awarded for above adequate or fully effective performance, this will not necessarily ensure continuous improvement. This is because the majority of systems may continue to award performance-based increases where a static level of above-adequate performance is maintained.

Possible Response

Set remuneration targets for individuals on the basis of performance expectations for the ensuing planning period. The expectations would take account of the assessed capacity of the individual to deliver required outputs and this, in turn, would be dependent on the level of performance demonstrated by the employee in the previous year's assessment. This would involve the wider recognition in the Victoria Public Service that band ranges reflect a performance scale, where a given level of performance, once achieved, must be exceeded to be able to attract a further pay increase.

The key consideration is that the organisation must be in a position to be able to match required outputs with the level of performance expected at any given point within the range. This implies a dynamic approach to the organisation of work and

to negotiation between the manager and employee on an annual basis as to the outputs expected.

It should be stressed that while this is seen as the ideal way in the right environment for ensuring continuous improvement, the choice of how (and whether) to pursue this must lie with the individual department.

Productivity Improvement

The expectation underpinning the performance pay system is that it will be paid for by continuously improving level of productivity in individual departments. The assumption, therefore, is that increased departmental productivity equates to the accumulated increase in performance by departmental employees. However, performance improvement does not always yield productivity improvement as it can be qualitative as well as quantitative.

The equation is complicated by across-the-board pay band adjustments made centrally to Government that are, in part at least, based on assumed increases in productivity. This is a pay policy issue.

The broader, more flexible pay bands were intended to facilitate fundamental redesign and reform of work within departments. Work redesign represents an opportunity for departments to significantly reduce costs by, for example, eliminating hierarchical organisation structures, defining individual jobs more broadly, making better use of teams to deliver services, and reducing handover points.

Possible Response

Better organisation of work so that it enhances productivity gains. This would be based on adoption of the concept of redefining jobs around evolving individual and organisational capabilities. That is, a dynamic approach to lock in continuous improvement. This is an area where it would be appropriate for departments to be supported with useful models and examples. The Office of the Public Service Commission (OPSC) would be prepared to research this issue to draw on and utilise relevant organisations with expertise.

Merit and Equity

While difference in systems features is not a problem from a service-wide perspective – that is, the system should have the flexibility to support particular human resources strategies and business priorities in individual departments – it is important that the system within a department is seen to be consistent and based on merit.

The statistics demonstrate that, across the Victoria Public Service, both the incidence and percentage of performance pay increase as band level increases. There has also been the issue of "hard and soft markers" which departments have addressed to some extent in the moderation process.

Possible Response

Enhance the tools that are used to assess people (combined with good moderation processes). This would include extending the use of standards, which are generally a better assessment tool for lower-level staff, to all departments. It would also focus on ensuring consistent thresholds for access to performance pay.

The Link to Pay Policy

A number of related pay issues were raised, including:

- the relationship between performance pay and across-the-board pay band adjustments;
- the funding of across-the-board increases;
- more flexibility for departments to pay one-off bonuses (for particular achievements during the planning period);
- the capacity to negotiate payment to attract and retain staff; and
- salary on transfer and salary of re-deployees.

It was felt that these matters would be better dealt with through the forthcoming review of pay policy.

IMMEDIATE RESPONSES

These are a number of areas where further enhancements could commence now. The use of pilot sites for developing best practice would be an appropriate technique. These include:

- development of models for work reform, including to support appraisal and reward of teams;
- strengthening communication on work planning and the link to strategic plans;

- consideration of the increase use of standards and improved rating scales to enhance the focus on continuous improvement;
- further development of quality moderation processes to enhance merit and equity and motivation; and
- continuing development and application of training and communication strategies.

FUTURE DIRECTIONS

There is the need for adoption of a two- to three-year outlook. Research outside of the Victoria Public Service indicates that performance management systems are undergoing considerable change. There is a move away from performance management systems that look at individual performance as a self-contained process and towards systems that seek to align individual performance management with the strategic needs of organisations. In keeping with this, performance management systems are operating differently in each department. Notwithstanding these different applications, the issues and concerns raised by departments are similar. Immediate options for change are limited and therefore need considering in the context of the desired future.

Employment agreements need to recognise that appraisal systems will probably need to change as we learn from experience. It is generally understood that performance management systems in departments will undergo considerable change as managers and staff develop the competencies needed to negotiate and plan work, establish key performance management on the acquisition of key organisational capabilities that are critical to the future direction of departments.

In developing policy in this area, central agencies should undertake rigorous consultation with departments to develop flexible arrangements that are responsive to the needs of different businesses. Establishing and maintaining a culture of performance management requires continual reassessment of the capabilities being developed and their alignment with the organisation's strategic direction.

**PERFORMANCE MANAGEMENT
WORKSHOP OUTLINE**

ZAMBIA

1. Opening
2. Overview of the new performance management package
 - merits of the new package
 - characteristics and elements of the new system
 - relationship to the Public Service Review Program (PSRP)
3. Performance management (in PSRP context)
 - definition and models of performance management
 - discussion of PSRP
 - different types of performance management systems
 - importance of performance management
4. Organisation Work Plan and Target-Setting
 - steps in developing an organisation work plan
 - mission or broad objective*
 - key result areas (KRAs)*
 - principal accountabilities of KRAs*
 - target-setting*
 - schedule of programme activities*
 - organisations that contribute to progress*
 - resource persons*
 - estimates of supplies, equipment and services*
 - cost of programme*
 - assumptions*
 - work plan charts*
5. The Individual Work Plan/Target-Setting
 - steps in developing individual workplans

job purpose
KRAs and principal accountabilities
targets
performance/KRAs/target form

6. APAS (Annual Performance Appraisal System) Procedures

- why appraise?
- uses/benefits of appraisal
- the APAS forms
- the overall systems
- Ministry APAS committees
- central agency role and monitoring/reviewing APAS
- rewards and incentives

7. Preparing for the Appraisal Interview – Providing Performance Feedback

- motivation
- informal feedback
- preparing for formal feedback
- physical setting
- attitude
- the procedure
- role-play exercise

8. Managing Performance Problems

- what's the problem?
- what's causing the problem?
- solving the problem

9. Performance Development Plans

- review the targets/clarify the 'gap'
- choosing which issues to work on
- explore the options
- agree on strategy
- set a review date
- closing the discussion
- the follow-up

10. Post-Programme Work
 - next steps
 - the Ministry APAS committee
 - group-sharing
11. Questions/Discussion
12. Summary and Program Evaluation

Appendix E

Aims, learning objectives and course content for courses to be delivered across the Civil Service following the planned cascade training programme

Developed jointly by Directorate of Training, Zimbabwe Institute for Public Administration (ZIPAM) and Commonwealth Consultant

It was agreed that at the end of the *train the trainer programme*, covering 70 trainers (30 undertaking 7 days' training, 40 undertaking 3 days' bridging), trainers would be equipped with material and course outlines to conduct two types of course.

Course 1 to be a three-day programme, *Performance Management for Non-Supervisors* (job-holders who will not be conducting appraisal).

Course 2 to be a three-day programme, *Performance Management for Managers and Supervisors* (job-holders who will be conducting appraisal).

Proposed aims, learning objectives and course content for each of these courses is given on the following pages. It was agreed that ZIPAM would develop course outlines based on these proposals. It was also discussed and agreed that:

- the revised and Government-endorsed *Guide to Performance Management* would be part of the course hand-out material;
- the yearly performance management cycle of planning and work planning meetings, progress review meetings, the annual appraisal, and decisions flowing from that appraisal would be the focus of training;
- that necessary skills training, e.g. negotiation, communication, coaching etc. would be built around, and reinforce understanding of the activities of the annual cycle.

COURSE 1 Performance Management for Non-Supervisors

Course Duration

2 days

Course Aims

To provide course participants with an overview of the Zimbabwe Government Performance Management System and its focus of working towards results to improve efficiency, productivity and service to the public.

Learning Objectives

By the end of the course participants will be able to:

- assess the attitudinal barriers to, and the benefits of, the performance management system;
- explain the Zimbabwe Government Performance Management System and describe its goals;
- formulate KRAs and objectives;
- develop own work plans for discussion with supervisor;
- discuss, negotiate and agree on work KRAs and objectives;
- provide appropriate input into work plan, progress review and annual appraisal interviews.

Course Content

Course to include:

- group exercise on perceived barriers and benefits of performance management;
- explanation of system using performance management system diagrams:
 - cascading objectives with feedback arrows;
 - cycle of performance management activities, planning, progress review, annual appraisal and judgements;

- developing KRAs and objectives and description of KRAs as coming from both mission statements, ministry or unit objectives and individual job descriptions;
- completing the work plan, including when generic objectives and standards are appropriate, work processes and job boundaries and SMART;
- appropriate preparation for, and input into the interview process, the work plan meeting, the progress review meeting and the appraisal interview.

COURSE 2 Performance Management for Managers and Supervisors

Course Duration

3 days

Course Aims

To provide participants with an overview of the Zimbabwe Government Performance Management System as a tool for improved management, increased organisational efficiency, productivity and service to the public, and the role of the manager and supervisor in achieving change through performance management.

Learning objectives

By the end of the course participants will be able to:

- assess the attitudinal barriers to, and the benefits of, the performance management system;
- explain the Zimbabwe Government Performance Management System and describe its goals;
- draw up departmental work plan in consultation with staff;
- link departmental and individual work plans to ministry's mission;
- discuss and resolve communication barriers with staff;
- develop individual or group work objectives and performance standards in collaboration with staff;

- help staff to produce individual work plans;
- conduct regular progress interviews;
- recognise, manage and improve unsatisfactory performance;
- conduct objective appraisal interviews;
- complete the appraisal form and use the rating scale fairly and accurately.

Course Content

Course to include:

- group exercise on perceived barriers and benefits of performance management;
- explanation of system using performance management system diagrams:
 - cascading objectives with feedback arrows;
 - cycle of performance management activities, planning, progress reviews, annual appraisal and judgements;
 - manager's and supervisor's roles and responsibilities;
- performance management as change management and the implications;
- running the division planning meeting and other team meetings;
- developing KRAs and objectives and performance standards for groups and individuals in collaboration with staff;
- building and communicating to staff the links between the group and individual plans, the mission statement and Ministry objectives;
- managing the interview process, in the work plan meeting, the progress review meeting and the appraisal interview;
- managing unsatisfactory performance;
- understanding bias in making appraisal judgements and the use of rating scales;
- recognising and rewarding performance.

TERMS COMMONLY USED IN PERFORMANCE MANAGEMENT

Complex terminology has developed in relation to performance management. In different settings, different meanings are often ascribed to terms. Performance management theorists hotly debate meanings of such terms as *performance standard*. In practice, which term is used is not important, what is important is there is a common understanding of the particular term in the setting in which it is being used. This may be helped by providing your own set of definitions for the terms your agency has decided to use within your performance management system.

The list that follows details a number of terms commonly used in performance management, together with generally accepted meanings.

TERM	MEANING
Assessment	Formal evaluation of performance usually annual, used interchangeably with the terms, appraisal and review.
Appraisal	Most common term used to describe annual evaluation of performance, meaning as assessment.
Capabilities	Generally used to identify and describe the attributes, in terms of organisational structure, and type, level and quantity of skills of employees, a particular agency may need to meet its future objectives.
Competencies	Defined skills, knowledge and experience required for successful performance in particular classes or types of jobs.
Feedback 360 degrees	Describes processes being developed in some settings for including information from peers, subordinates and internal and external customers as well as the supervisor in appraising performance.
Inputs	The resources, skills and experience brought to an activity before objectives are achieved and outputs produced.
Key Result Areas	The major programme or work areas in which it is decided an organisation, group or individual must achieve objectives.
Key Tasks	Used to describe the major activities to be undertaken to complete an objective. Commonly used in performance systems, instead of the term objective.
Merit Pay	Performance-related pay type in which increases to base salary are determined on performance.
Milestone	Term borrowed from project planning. Generally describes when a significant stage is reached in the achievement of an objective.
Mission	A broad, highest level statement of purpose for an organisation which defines its business and direction.
Objectives	Concise statements which detail outcomes the organisation, group or individual plan to achieve within a particular time frame. Statements of objectives may incorporate performance targets.
Outputs	The end results of processes or activities undertaken by agencies, groups or individuals.
Peer Review	Incorporation in performance assessment of the views of individual's colleagues as well as their manager.

Performance Indicator	A performance indicator expresses how results will be measured. In developing performance indicators, time, cost, quality and quantity relating to the objective are considered.
Performance Management	System designed to improve organisational performance, linking Corporate Planning and Budgetary cycles and plans to division, team and individual work planning, appraising, training and reward and recognition activities.
Performance Measure	Unit of measure used to determine whether objectives or outputs were achieved. Often used in place of term performance indicator, and sometimes includes standards or targets.
Performance Standard	Agreed level of achievement to be reached by all employees involved in the achievement of a particular objective or key task.
Performance Target	Targets include amount, quality and/or timeframe for completion of activity.
Performance Bonus	One-off sum paid to groups or individuals for performance achievements.
Performance-Related Pay	That part of remuneration to an individual which is linked to agency, group or individual performance. Main types include merit pay, performance bonuses, and pay for skills acquired and used.
Plan Business	Plan which translates strategic directions into action, operational in focus and includes resourcing and detailed timelines.
Plan Corporate	Overview plan for the agency which details the agency mission, vision, and strategies for realising them.
Plan Strategic	Plan to establish high level strategic direction for the agency for periods of 3 to 5 years. Focuses on the operating environment, overall objectives and best strategies to achieve them.
Plan – Performance Plan, Work Plan or Action Plan	Plan of agreed group or individual objectives and performance targets for an appraisal period. Generally includes training and development plan.
Progress Review	Periodic discussions between managers and employees to discuss progress, resolve problems and adjust workplans, if necessary during the annual performance cycle. Generally documented and takes place quarterly or six-monthly.
Review (Annual)	Term adopted by some performance management systems to describe the annual evaluation of performance. Common meaning with assessment, appraisal in performance management terms.

Strategies	Best actions for achieving results.
Vision	A broad, highest level leadership statement of what an organisation aims to become.