

Mid-Term & Final Review Process - Guide for Heads/Directors/Executive Deans

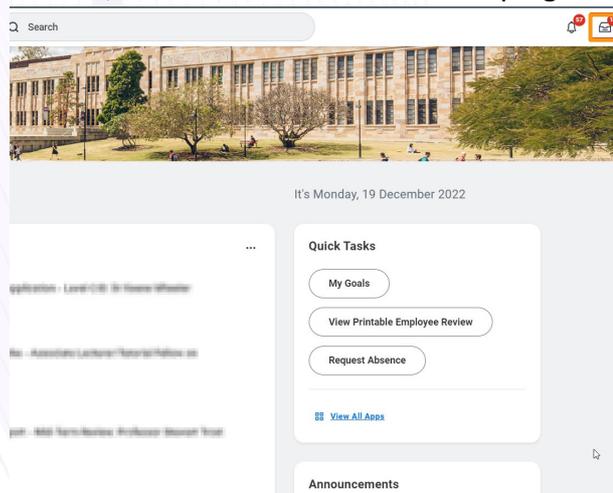
NOTE: Approximately 2 – 3 months prior to the staff member’s Mid-Term Review or Final Review documentation due date they will receive a notification via their UQ email address with details of their Mid-Term Review or Final Review and the associated required actions.

Prior to submitting their Mid-Term Review or Final Review documentation employees should ensure that their [Individual Activity Profile \(IAP\)](#) is up to date. When reviewing the Mid-Term Review or Final Review Application Form please do so in junction with the employee’s IAP.

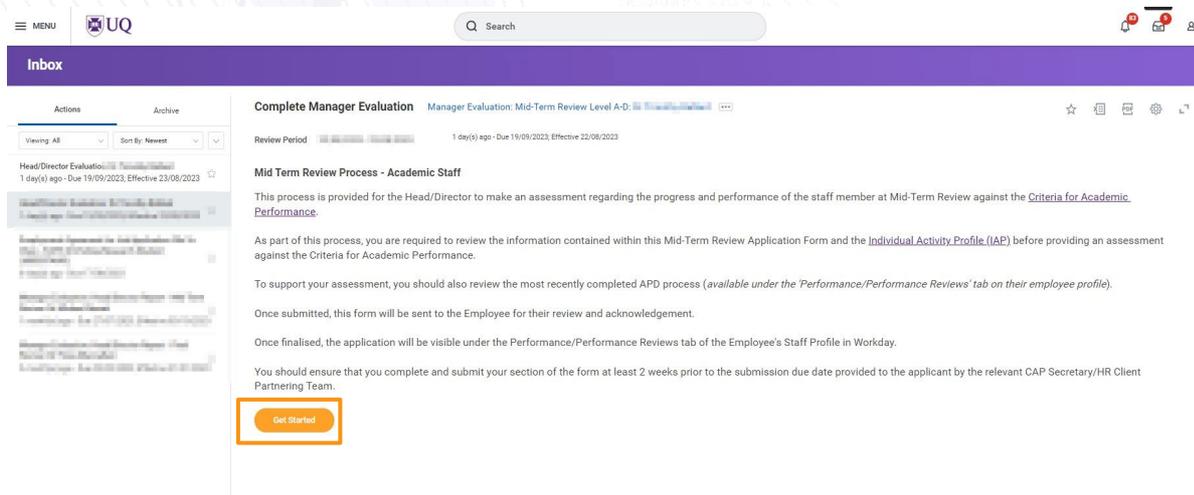
Head of Schools/Directors should refer to **steps A – I** for relevant instructions. **Executive Deans** should refer to **steps J - M** for relevant instructions (Level E Mid-Term Reviews and Final Review processes).

Instructions for Heads/Directors

A Log into your Workday account, click on the mailbox in the top right corner of the landing page.

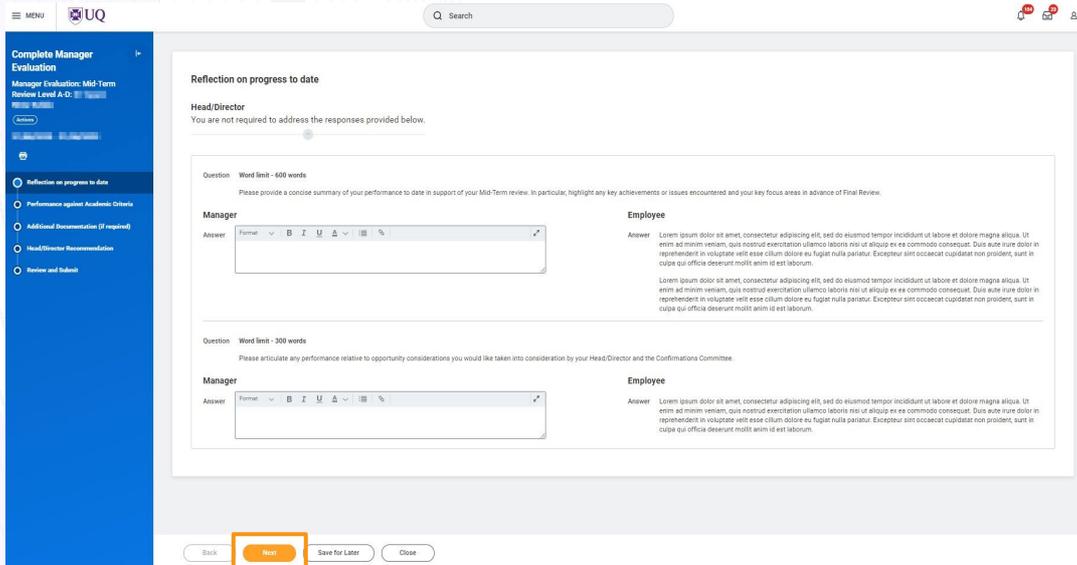


B Navigate to the Inbox and open the ‘Head/Director Evaluation’ task. Once you have read the relevant information and instructions on the page click **Get Started**.



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- C** Review the content in the Reflection on Progress to Date (for Mid-Term Reviews)/Case for Confirmation (for Final Reviews) section and any information presented in the performance relative to opportunity section. You are not required to add any comments here. Once completed click **Next**.



Reflection on progress to date

Head/Director

You are not required to address the responses provided below.

Question **Word limit - 400 words**

Please provide a concise summary of your performance to date in support of your Mid-Term review. In particular, highlight any key achievements or issues encountered and your key focus areas in advance of Final Review.

Manager

Answer

Employee

Answer

Question **Word limit - 300 words**

Please articulate any performance relative to opportunity considerations you would like taken into consideration by your Head/Director and the Confirmations Committee.

Manager

Answer

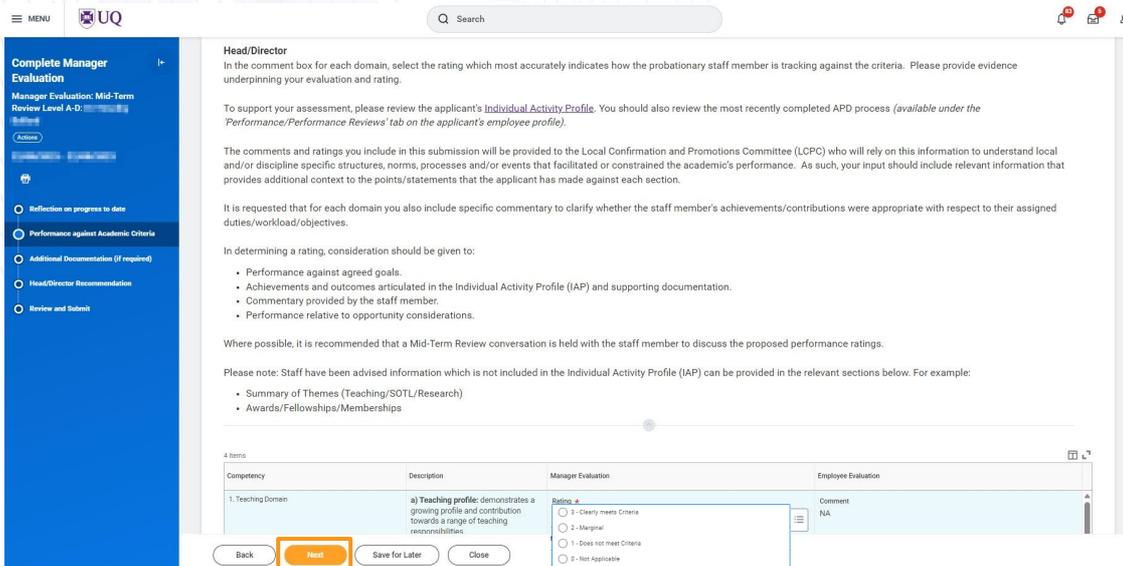
Employee

Answer

Back **Next** Save for Later Close

- D** Please review the employee's self-evaluation for each domain as set out in the [Criteria for Academic Performance](#). Then provide a rating and comment for each domain in the relevant boxes.

Once complete, click **Next**.



Head/Director

In the comment box for each domain, select the rating which most accurately indicates how the probationary staff member is tracking against the criteria. Please provide evidence underpinning your evaluation and rating.

To support your assessment, please review the applicant's [Individual Activity Profile](#). You should also review the most recently completed APD process (available under the 'Performance/Performance Reviews' tab on the applicant's employee profile).

The comments and ratings you include in this submission will be provided to the Local Confirmation and Promotions Committee (LCPC) who will rely on this information to understand local and/or discipline specific structures, norms, processes and/or events that facilitated or constrained the academic's performance. As such, your input should include relevant information that provides additional context to the points/statements that the applicant has made against each section.

It is requested that for each domain you also include specific commentary to clarify whether the staff member's achievements/contributions were appropriate with respect to their assigned duties/workload/objectives.

In determining a rating, consideration should be given to:

- Performance against agreed goals.
- Achievements and outcomes articulated in the Individual Activity Profile (IAP) and supporting documentation.
- Commentary provided by the staff member.
- Performance relative to opportunity considerations.

Where possible, it is recommended that a Mid-Term Review conversation is held with the staff member to discuss the proposed performance ratings.

Please note: Staff have been advised information which is not included in the Individual Activity Profile (IAP) can be provided in the relevant sections below. For example:

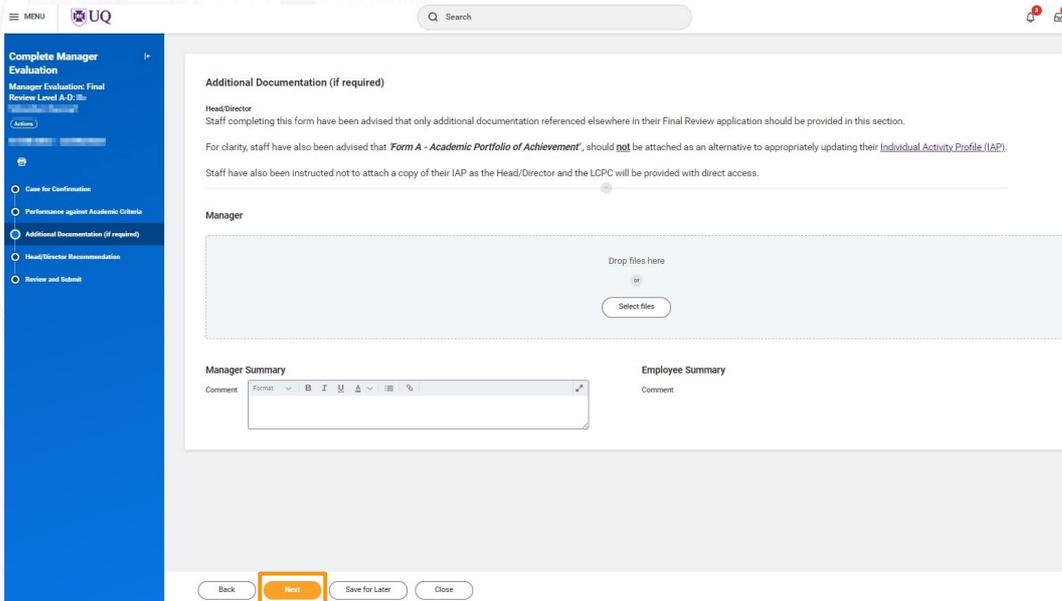
- Summary of Themes (Teaching/SOTL/Research)
- Awards/Fellowships/Memberships

Competency	Description	Manager Evaluation	Employee Evaluation
1. Teaching Domain	a) Teaching profile: demonstrates a growing profile and contribution towards a range of teaching responsibilities.	Rating: <input type="radio"/> 3 - Clearly meets Criteria <input type="radio"/> 2 - Marginal <input type="radio"/> 1 - Does not meet Criteria <input type="radio"/> 0 - Not Applicable	Comment NA

Back **Next** Save for Later Close

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E In the 'Additional Documents' section, review any documents the employee has included. There is also the option for you to include any relevant documents. Once complete, click **Next**.



Complete Manager Evaluation
Manager Evaluation: Final Review Level A-D: [Progress Bar]

- Case for Confirmation
- Performance against Academic Criteria
- Additional Documentation (if required)**
- Head/Director Recommendation
- Review and Submit

Additional Documentation (if required)

Head/Director
Staff completing this form have been advised that only additional documentation referenced elsewhere in their Final Review application should be provided in this section.

For clarity, staff have also been advised that **Form A - Academic Portfolio of Achievement**, should **not** be attached as an alternative to appropriately updating their **Individual Activity Profile (IAP)**.
Staff have also been instructed not to attach a copy of their IAP as the Head/Director and the LCPC will be provided with direct access.

Manager

Drop files here
or
Select files

Manager Summary
Comment

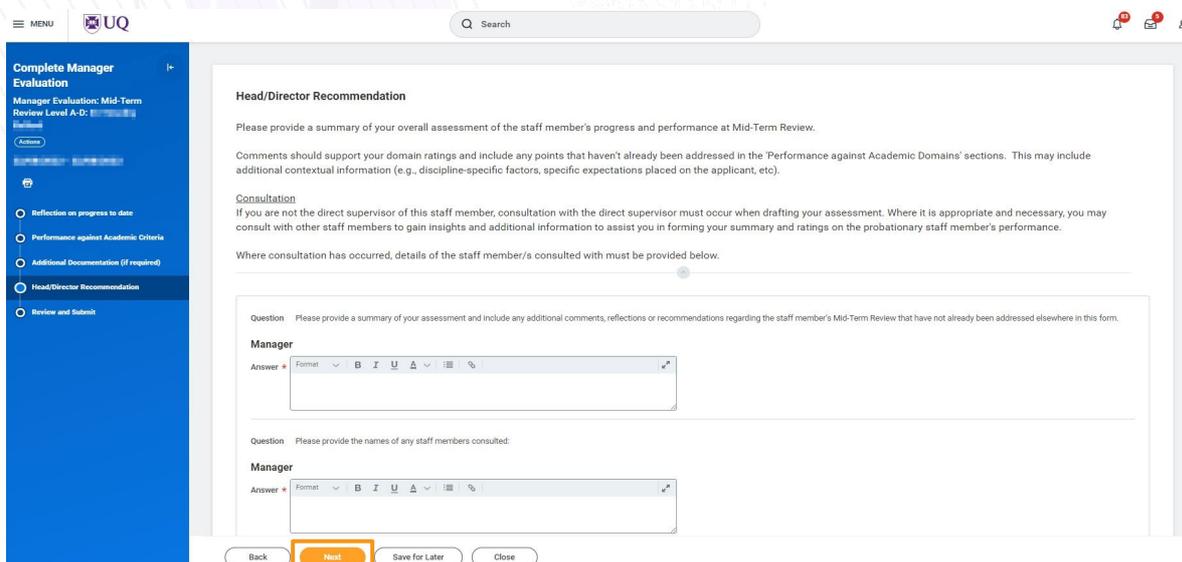
Employee Summary
Comment

Back **Next** Save for Later Close

F In the 'Head/Director Recommendation' page, provide a summary of your overall assessment of the staff member's progress and performance at Mid-Term Review. You will also be required to list any other staff members you consulted with in formulating your comments and ratings. *For Level E staff there will be an additional section titled 'Executive Dean' Report, please leave this section blank.*

For Final Review applications only - you will be required to provide an overall rating of the staff members performance in the drop-down box provided.

Once complete, click **Next**.



Complete Manager Evaluation
Manager Evaluation: Mid-Term Review Level A-D: [Progress Bar]

- Reflection on progress to date
- Performance against Academic Criteria
- Additional Documentation (if required)
- Head/Director Recommendation**
- Review and Submit

Head/Director Recommendation

Please provide a summary of your overall assessment of the staff member's progress and performance at Mid-Term Review.

Comments should support your domain ratings and include any points that haven't already been addressed in the 'Performance against Academic Domains' sections. This may include additional contextual information (e.g., discipline-specific factors, specific expectations placed on the applicant, etc).

Consultation
If you are not the direct supervisor of this staff member, consultation with the direct supervisor must occur when drafting your assessment. Where it is appropriate and necessary, you may consult with other staff members to gain insights and additional information to assist you in forming your summary and ratings on the probationary staff member's performance.

Where consultation has occurred, details of the staff member/s consulted with must be provided below.

Question Please provide a summary of your assessment and include any additional comments, reflections or recommendations regarding the staff member's Mid-Term Review that have not already been addressed elsewhere in this form.

Manager

Answer

Question Please provide the names of any staff members consulted.

Manager

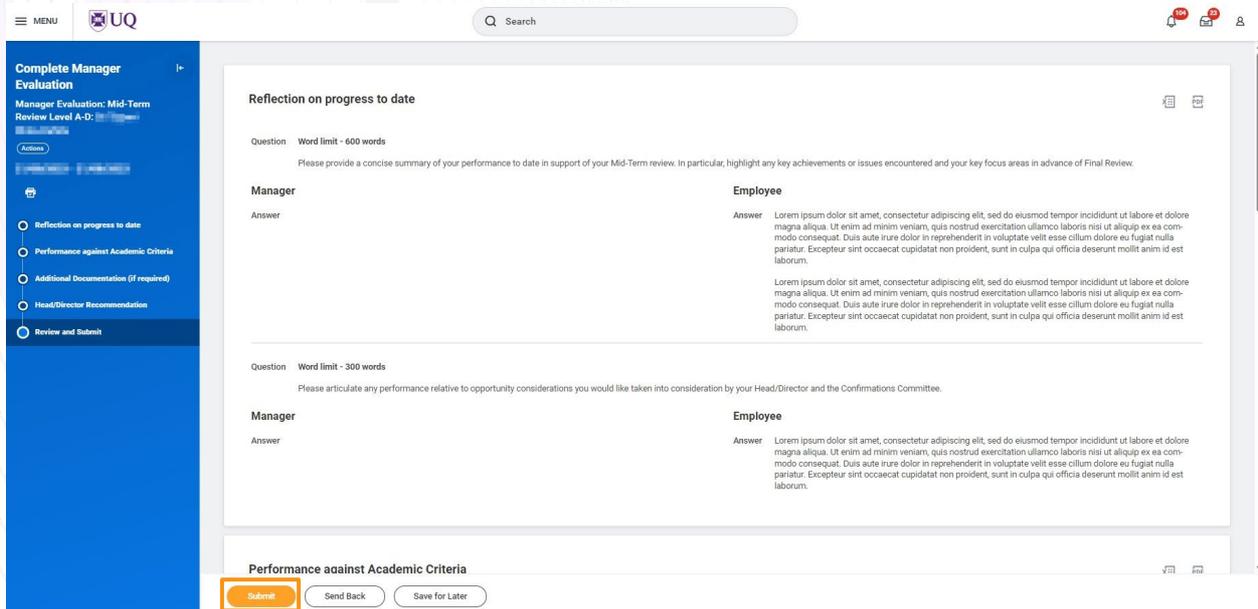
Answer

Back **Next** Save for Later Close

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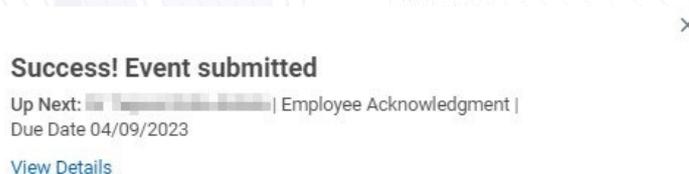
G For Final Reviews you (Head/Director) are required to meet with the employee to discuss the information you have included in this document. It is recommended that you do this before you submit the form.

You can save your comments and input without submitting the form by using the 'Save for Later' function. You also have the option to send the application back to the staff member for corrections/updates using the 'Send Back' option. Once you are comfortable with all the content, click **Submit**.



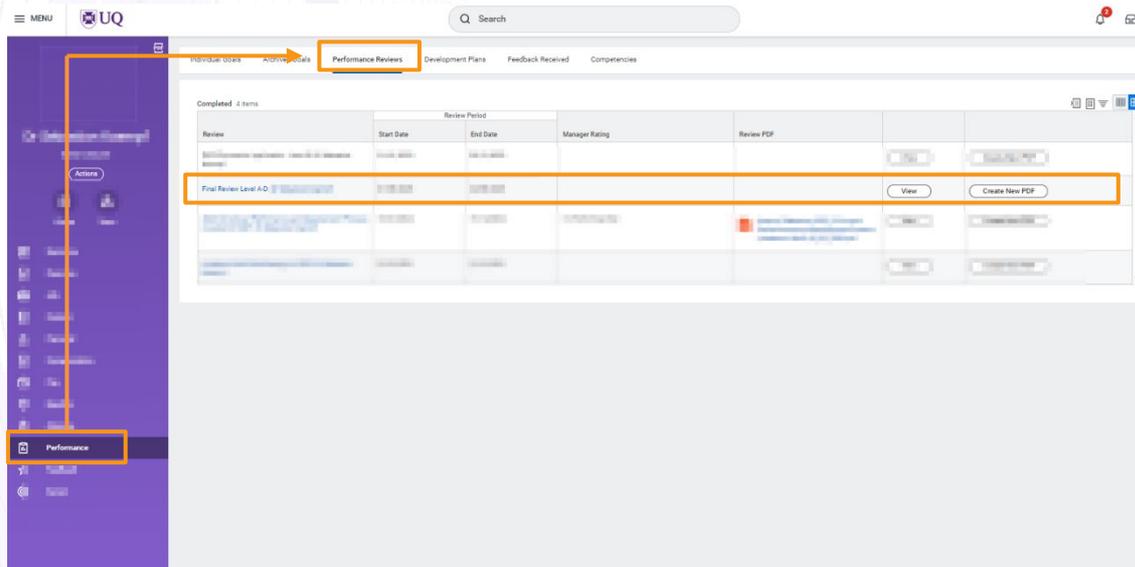
The screenshot shows a web interface for 'Complete Manager Evaluation'. The left sidebar contains a navigation menu with options: 'Reflection on progress to date' (selected), 'Performance against Academic Criteria', 'Additional Documentation (if required)', 'Head/Director Recommendation', and 'Review and Submit'. The main content area displays two sections: 'Reflection on progress to date' and 'Performance against Academic Criteria'. Each section has a 'Question' field with a word limit and an 'Answer' field for both 'Manager' and 'Employee'. The 'Submit' button is highlighted in orange.

H You will receive a pop-up notification advising of successful submission. The form will now progress to the employee for their acknowledgement (and optional response) to your comments. *For Level E staff this form will progress to the Executive Dean to complete and Executive Dean Report prior to the acknowledgement step.* The employee's manager will also receive an alert in Workday that a process has been completed for the staff member.



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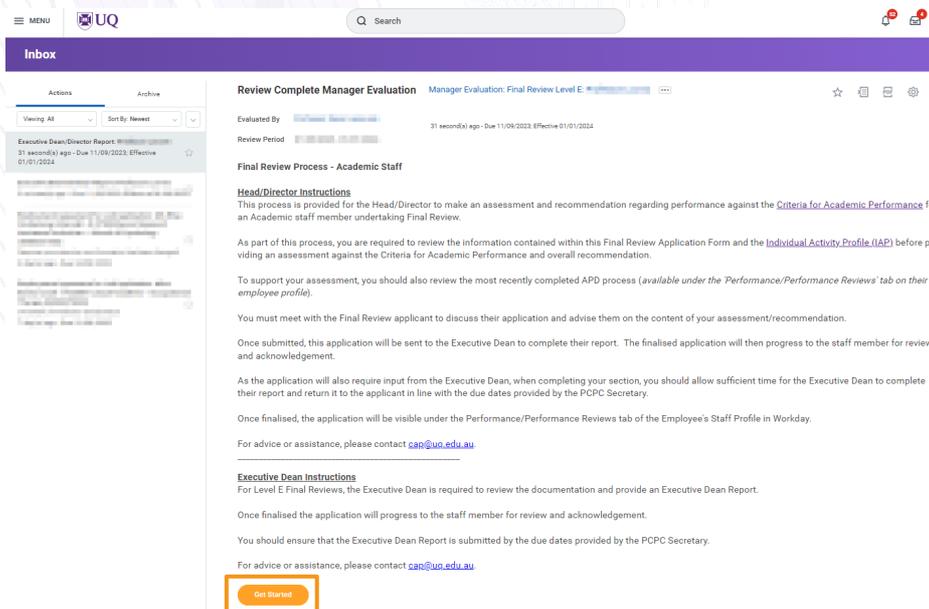
I To view or create a pdf of the application, select 'Performance' on the Employee's Profile, then select the 'Performance Reviews' tab. Select **View** or **Create New PDF**.



Instructions for Executive Deans

For Level E Mid-Term and Final Review applications only

J Navigate to the Inbox and open the Executive Dean/Director Report task. Once you have read the relevant information and instructions on the page click **Get Started**.



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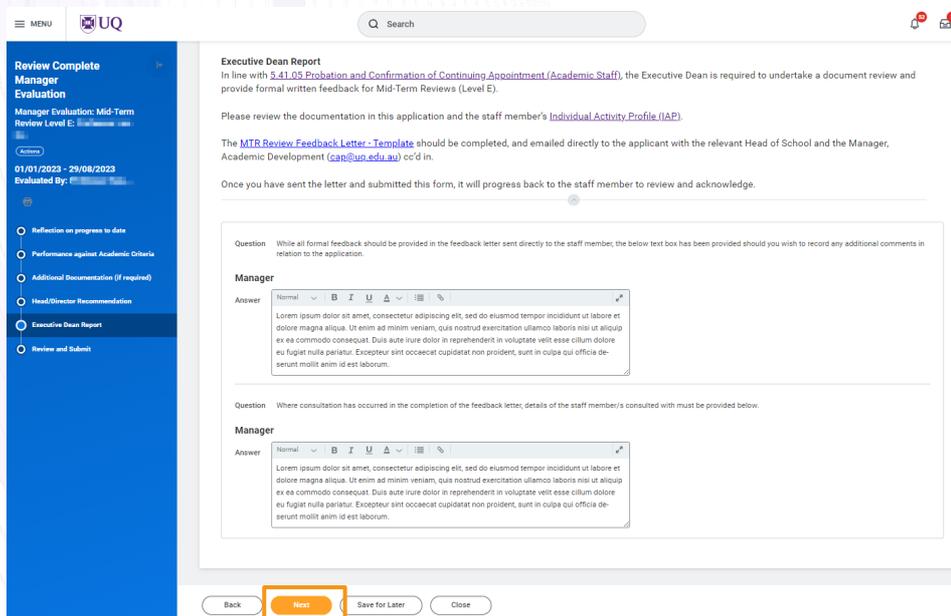
K

Review the information contained in the submission and the staff member's [Individual Activity Profile \(IAP\)](#).

For Mid-Term Reviews follow the instructions contained in the help text to draft and send the applicant a Mid-Term Review Feedback Letter (letter to be sent directly via email).

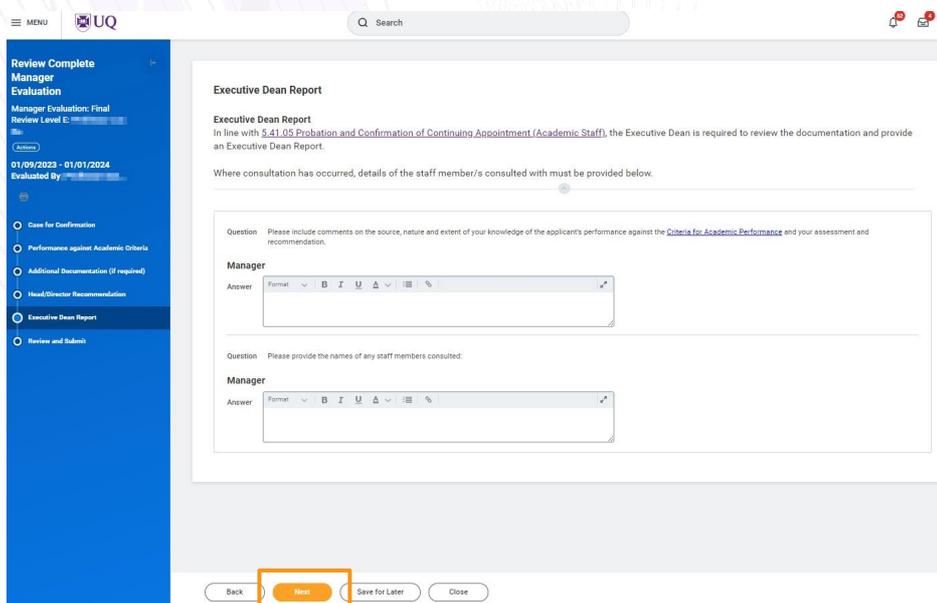
For Final Review provide your assessment in the relevant box on the 'Executive Dean/Institute Director Report' section.

You will also be required to list any staff members you consulted with during this process. Once complete, click **Next**.



The screenshot shows the 'Mid-Term Review Screen' in a web application. On the left is a blue sidebar with a navigation menu. The main content area is titled 'Executive Dean Report' and contains instructions for the user. Below the instructions are two text input fields for providing additional comments and details of consultations. At the bottom, there are four buttons: 'Back', 'Next' (highlighted with an orange box), 'Save for Later', and 'Close'.

Mid-Term Review Screen



The screenshot shows the 'Final Review Screen' in the same web application. The sidebar and header are consistent with the previous screen. The main content area is titled 'Executive Dean Report' and contains instructions for the user. Below the instructions are two text input fields for providing comments and listing consulted staff members. At the bottom, there are four buttons: 'Back', 'Next' (highlighted with an orange box), 'Save for Later', and 'Close'.

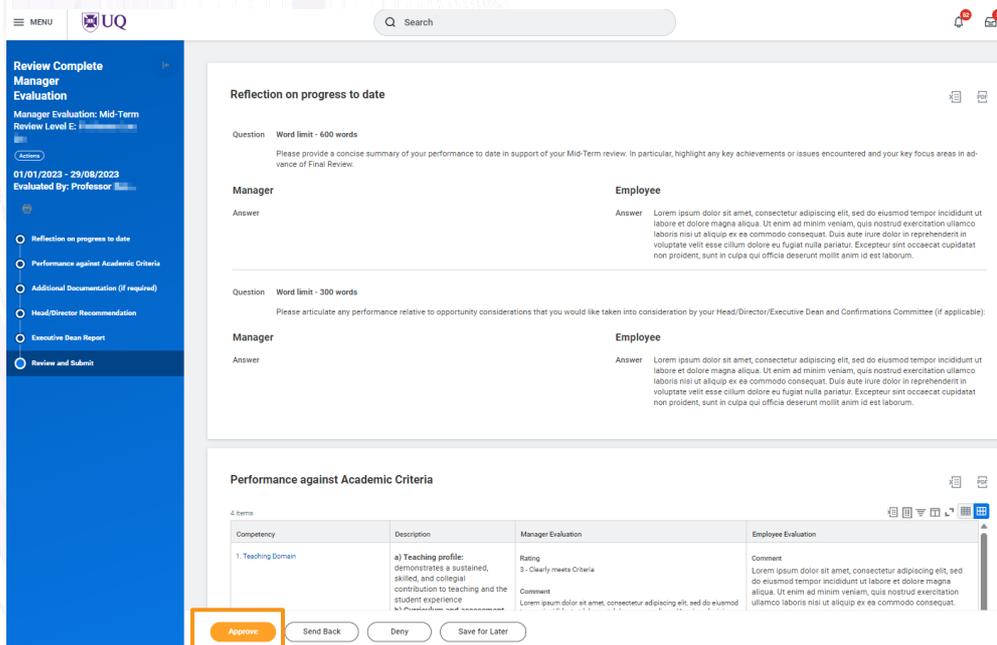
Final Review Screen

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L

Your input should be visible on the 'Review and Submit' screen. You can save your comments and input without submitting by using the 'Save for Later' function. You also have the option to send the application back to the staff member for corrections/updates using the 'Send Back' option.

Once you have reviewed all the comments and are satisfied with the content, click **Approve**.



Review Complete
Manager Evaluation
Manager Evaluation: Mid-Term
Review Level: 3
01/01/2023 - 29/08/2023
Evaluated By: Professor [Name]

- Reflection on progress to date
- Performance against Academic Criteria
- Additional Documentation (if required)
- Head/Director Recommendation
- Executive Dean Report
- Review and Submit**

Reflection on progress to date

Question Word limit - 600 words
Please provide a concise summary of your performance to date in support of your Mid-Term review. In particular, highlight any key achievements or issues encountered and your key focus areas in advance of Final Review.

Manager
Answer

Employee
Answer Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Question Word limit - 300 words
Please articulate any performance relative to opportunity considerations that you would like taken into consideration by your Head/Director/Executive Dean and Confirmations Committee (if applicable).

Manager
Answer

Employee
Answer Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

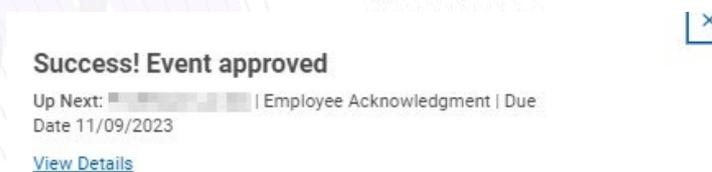
Performance against Academic Criteria

Competency	Description	Manager Evaluation	Employee Evaluation
1. Teaching Domain	a) Teaching profile: demonstrates a sustained, skilled, and collegial contribution to teaching and the student experience	Rating 3 - Clearly meets Criteria Comment Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod	Comment Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Approve Send Back Deny Save for Later

M

You will receive a pop-up notification advising of successful submission. The submission will now progress to the employee for their acknowledgement (and optional response) to your comments.



Success! Event approved

Up Next: [Name] | Employee Acknowledgment | Due Date 11/09/2023

[View Details](#)