

Annual Performance and Development (APD)

What you need to know to make the most of the process this year

Acknowledgement of Country

The University of Queensland (UQ) acknowledges the Traditional Owners and their custodianship of the lands on which we meet.

We pay our respects to their Ancestors and their descendants, who continue cultural and spiritual connections to Country.

We recognise their valuable contributions to Australian and global society.



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APD Purpose

Through APD, the university is seeking a culture change away from a sole focus on traditional performance management (which predominately focuses on reviewing and assessing staff performance) towards a focus on performance development (supporting and developing our staff to acquire new skills and knowledge).

At UQ, the Annual Performance and Development (APD) process encourages staff to:

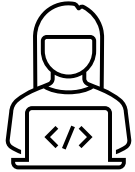
- Highlight their achievements and progress against previously set goals
- Reflect broadly on their performance
- Clarify their career and development aspirations
- Set their goals and objectives for the year to come
- Prioritise a designated time to connect with their supervisor for a formal APD conversations to discuss performance and career development.

The APD process was designed to:

- *Increase the quality of performance conversations and feedback provided to staff*
- *Provide recognition of citizenship activities and behaviours aligned to the UQ values*
- *Improve focus and support for the career and development aspirations of our staff.*

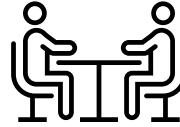
APD ultimately aims to help staff be more effective in their roles, drive staff development and contribute to staff engagement.

APD Roles and responsibilities



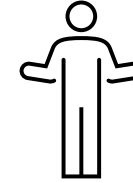
Staff member

- Complete self-evaluation and draft goals via Workday ahead of APD conversation
- Proactively book time with your Supervisor / Manager/ PDM for the APD conversation
- Consider the development opportunities or career aspirations you might wish to discuss with your Supervisor
- Reflect on opportunities to contribute to the broader Organisational Unit or University strategy



Supervisor / Manager / PDM

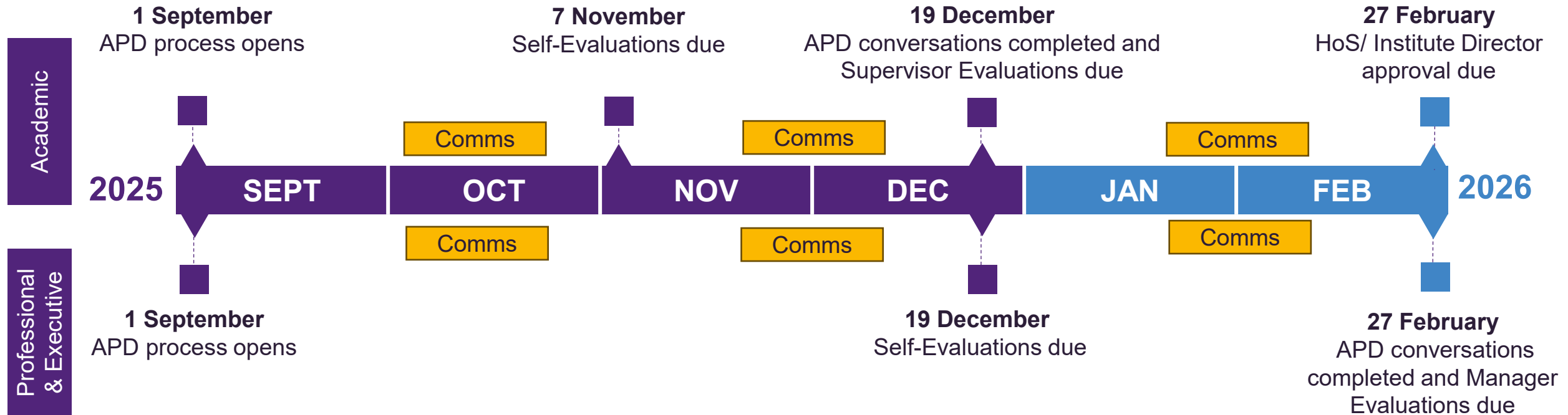
- Prepare for the APD conversation by reviewing the staff member's APD in Workday
- Consider goals for the year ahead and alignment with broader Org Unit / University objectives
- Undertake relevant **APD training** to increase the effectiveness of your APD conversations.
- Schedule the APD conversation with your staff
- Jointly reflect on the past year's achievements in the context of identifying priority areas for next year
- Use coaching questions to draw out development areas



Head of School / Institute Director

- Review past APD data to identify specific areas for focus
- Communicate the purpose and importance of the APD process to your staff and supervisors. Include any strategic priorities for your unit to inform goal setting.
- Meet with your supervisors to clarify and communicate your expectations for the APD process (e.g., consistent use of performance ratings, application of the academic criteria, how career/development needs will be supported)
- Confirm that all Supervisors/PDM's have undertaken **APD training** as required by the Enterprise Agreement.

APD 2025/2026-Timeline and Due Dates



- Central communications will be sent by HR, further details and dates on the next slide.
- Local monitoring of completion rates and additional communications to be drafted and distributed by local leaders, with support from HRCP as required.

Communications-Centrally Distributed

Below is a timeline and summary of the communications coordinated and sent centrally by HR during the 2025/26 APD season to those with a status of outstanding completion.

Academic	
When	Details
1 September 2025	Launch Communications
15 October 2025	Self Evaluation Reminder
12 November 2025	Manager Evaluation Reminder
10 December 2025	Manager Evaluation Reminder
4 February 2026	Reminder to HoS/Directors to complete approval step
March/April 2026	Employee Acknowledgement Reminder – All Staff Remaining

Professional and Executive	
When	Details
1 September 2025	Launch Communications
12 November 2025	Self Evaluation Reminder
10 December 2025	Self Evaluation Reminder
13 February 2026	Manager Evaluation Reminder
March/April 2026	Employee Acknowledgement Reminder – All Staff Remaining

Workday Updates

A recent Workday release provides positive updates for APD 2025/26



Career Development & Aspirations

New and improved enhancements for career development section within the Workday templates

Further reporting and insights

Improved APD form for all



Goal Layout

New outlay for the goals section in Workday

Bulk Updates and bucketed by status

User friendly



Goal Status

Currently not a mandatory field e.g. Not Started, In Progress or Blank

Will be a required field in 2025

Continuous Improvement in APD 2025/26



Timeline

Mass advancing of APD will not occur in 2025/26.

Leaders are responsible for finalising the process and by the key dates and supporting the process locally.



Goals Setting

We recommend aiming to set 5-7 quality SMART goals in total.

This breakdown could look like: 3-4 Delivery goals, 1-2 Citizenship goals, 1-2 Development goals

Suggest goals are focused be limited to actions/priorities that are specific and distinct from 'normal' or BAU tasks.



Goals in Workday

Please select only one goal category per goal when setting new goals for 2025/26.

If goals roll over from previous years, the goal category must be updated to the current year.

All 2023/24 Goals are subject to being mass archived

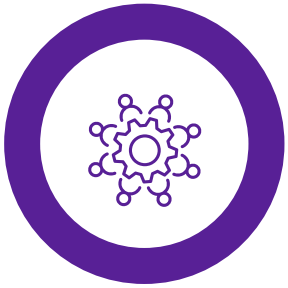


Acknowledgement Step

Acknowledgement step remains a mandatory field to record a date that APD conversation occurred.

This is for both Manager/Supervisor and Employee

APD Process Overview Tips



Different Forms & Workflows

The APD workflow in Workday is different for Academic and Professional, and Executive staff.

Each form has similar sections to review past goals, set future goals and career development aspirations

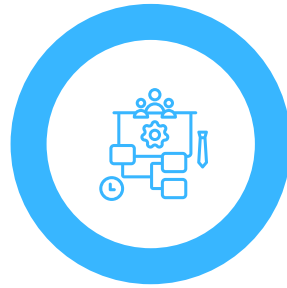


Academic APD

The Academic workflow routes has 4 steps:

1. Staff member (Self-Evaluation)
2. Supervisor/PDM (Manager Evaluation)
3. HOS/Director for final approval.
4. Staff Member (Employee Acknowledgement)

Supervisor comments and ratings will not be visible to Staff until Step 4



Professional & Executive APD

The Professional/Executive workflow has 3 steps: only routes from the staff member to the Manager.

1. Staff member (Self-Evaluation)
2. Manager (Manager Evaluation)
3. Staff Member (Employee Acknowledgement)

Manager comments and ratings will not be visible to Staff until Step 3



Sending Back

A Manager/HOS can send the form back for changes/refinements if necessary, however ANY COMMENTS made WILL NOT be visible within an employee self evaluation when this occurs. The employee will see comments and ratings at the final step of Employee Acknowledgement.

The
This is due to security roles in the system



Self Evaluation PDF Comments

Workday has restrictions on showing employee goal comments when their self evaluation has been submitted APD. They are only visible at the final step once Manager Evaluation has occurred.

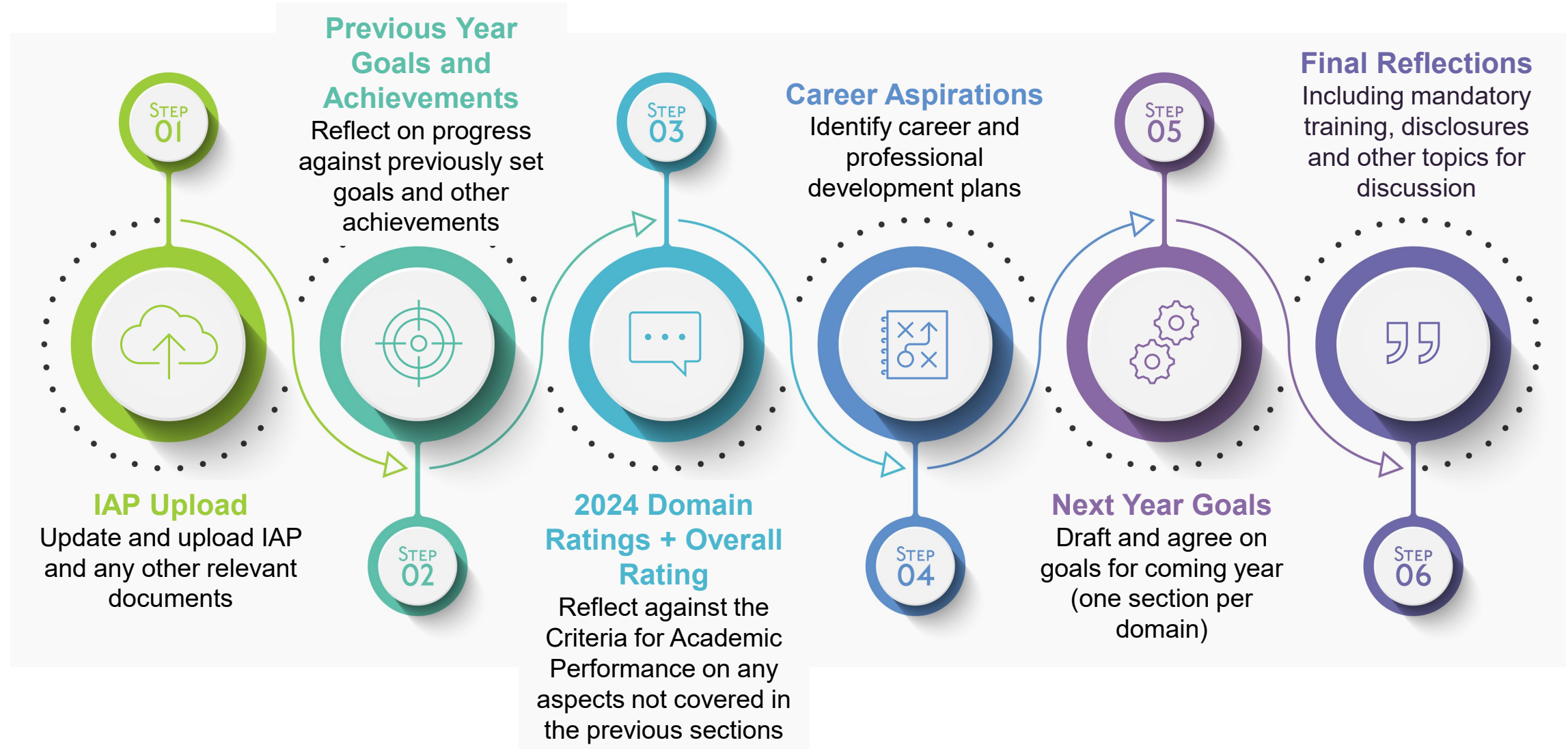
If you'd like a hard copy of your APD, please copy and paste these into a word document or have your Manager print the PDF as soon as you've submitted before they've entered comments



Eligibility

Continuing & Fixed Term staff (not Casuals, Unpaid or Conjoint) who have worked at UQ over 12 months consecutively are required to participate in APD.

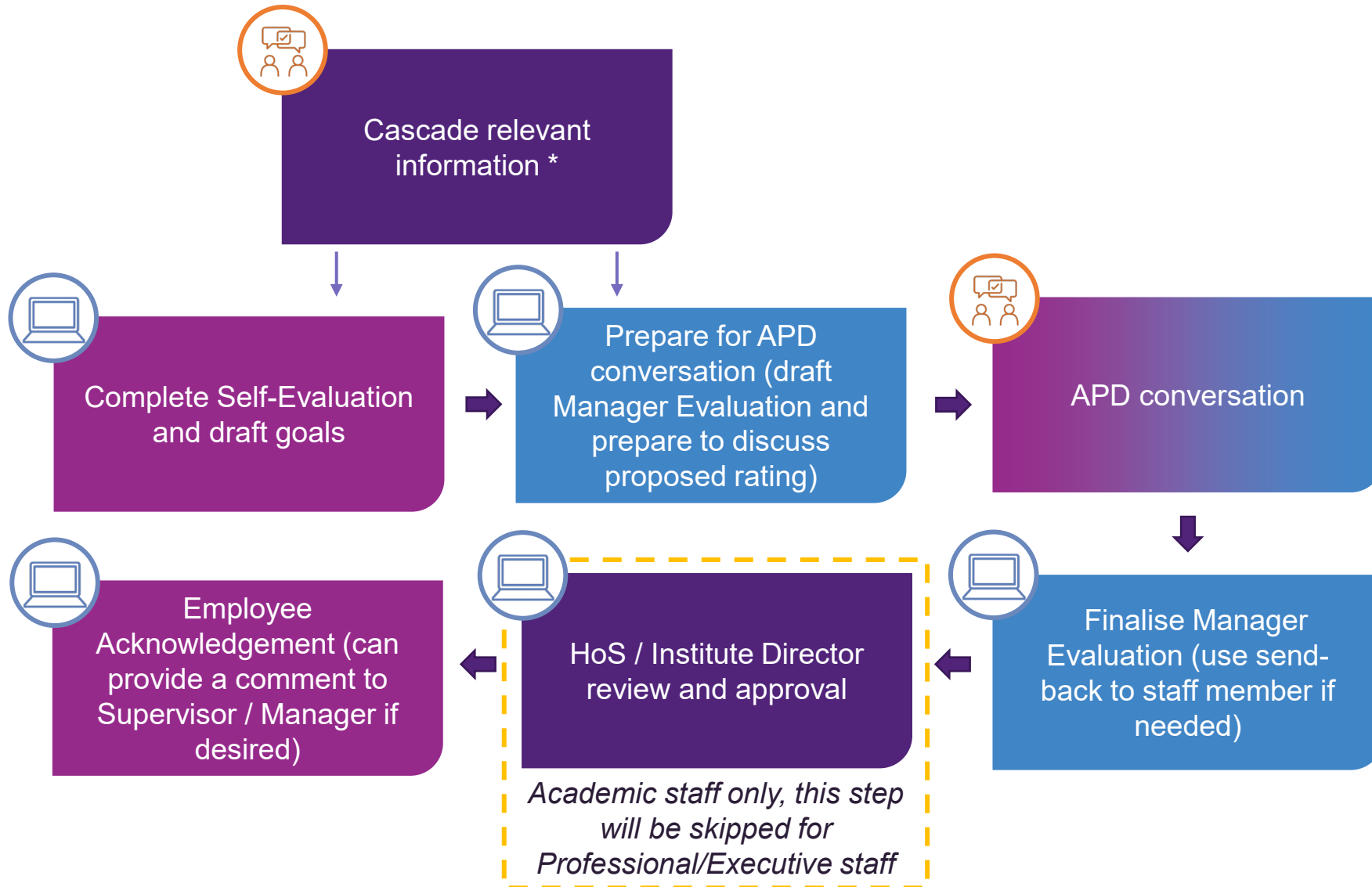
APD Workday Process for Academic Staff



APD Workday Process for Professional / Executive Staff



Recommended APD process



Key



* e.g. strategic planning, expectations, ratings guidance

Goal Setting – hints and tips

The core purpose of goal setting is to set clear expectations for what needs to be accomplished in the year ahead

Effective goal setting can:

- create clear expectations
- clarify requirements for a successful year
- create a clear vision for development and incorporate development opportunities
- create accountability
- make evaluations fairer
- support alignment of a staff member's goals with the Organisational Unit goals, and the University strategy more broadly (see [Goal Alignment](#) module).

Drafting goals

As a starting point, employees will draft their goals in Workday ahead of a discussion with their Manager. Determining your own goals increases ownership and commitment to achieving these objectives. Where needed, a Manager can add or expand on goals as part of the conversation.

Top Tip

We recommend aiming to set 5-7 quality SMART goals in total. This breakdown could look like: 3-4 Delivery goals, 1-2 Citizenship goals, 1-2 Development goals.

Goal setting is completed against specific goal categories

Professional / Executive	Academic *
• Delivery • Citizenship and Leadership • Development	• Teaching • Research • Supervision and Researcher Development • Citizenship and Service

* Depending on Academic Category

What resources should I refer to when goal setting?

Professional / Executive	Academic
• Position description / Job profile • UQ Strategic Plan • Organisational Unit Strategic Plan	• Position description / Job profile • Criteria for Academic Performance • UQ Strategic Plan • Organisational Unit Strategic Plan

[Academic
Goal Library](#)

[Professional
Goal Library](#)

[Executive
Goal Library](#)

Goals in Workday

Refresh on key areas on goal management including in APD and adhoc goal updates



How goals pre-fill in the APD template

- Automation of goals prefilling in the APD template is driven by the **goal category**
- Any goals that have rolled over automatically will have the 2024/25 goal category.
- Goals categories required being updated every year to ensure the pre-filled occurs
- Goals in the future section e.g. 2026 Goals will ALWAYS be empty and will require you to enter fresh goals for the year



Archiving of Goals

- Goal categories from previous years are archived to maintain quality data control in Workday for the past two years
- Archived goals can be found on your profile on the Performance Ribbon on Workday.
- If a goal has been archived incorrectly from an earlier year e.g. 2023/24, it will need to manually added in your APD with new goal categories applied.



Editing and Approving Goals

- Goals are managed between staff member and manager/supervisor including editing and approving.
- If you change roles and edit older/previous goal - your past Primary Manager will be the one who receives notifications. Suggest creating new goals instead and ideally within the APD template
- The annual archiving of goals supports streamlining of these processes and old approval chains that are no longer active.

Criteria for Academic Performance and Domain Ratings

How Supervisors assess performance against the Criteria for Academic Performance and determine a rating

Step 1

Consider:

- ① Performance against goals
- ② Achievements and outcomes articulated within IAP
- ③ Commentary and context provided in the APD template
- ④ Relative to opportunity considerations
- ⑤ Any other relevant observations from the supervisor

Step 2

Review the Criteria for Academic Performance and rating guidelines (as highlighted red below)

Further information can be found in the Academic Annual Performance and Development Policy and Procedure [5.70.15]

CITIZENSHIP AND SERVICE DOMAIN ACADEMIC PERFORMANCE: EXPECTATION BY LEVEL				
Level E Professor	Level D Associate Professor	Level C Senior Lecturer	Level B Lecturer	Level A Associate Lecturer
a) Citizenship: demonstrates leadership of self and senior leadership of others in relation to UQ values b) Internal service: demonstrates senior leadership in relation to internal service, including significant outcomes and innovations within and beyond the organisational area unit c) External service: demonstrates senior leadership in relation to external service d) Engagement: leads self and others in advancing partnerships, and in relation to UQ and public engagement activities e) Leadership: shows high level of leadership of self and others through mentoring, supervision, responsibility for staff wellbeing, and contributing to and improving the governance of the institution	a) Citizenship: demonstrates and leads others in relation to UQ values b) Internal service: sustains a track record of impact, achievement and initiative in internal service role/s c) External service: shows leadership in relation to external service d) Engagement: leads self and others in advancing partnerships, and in relation to UQ and public engagement activities e) Leadership: shows leadership of self and others through mentoring, supervision, responsibility for staff wellbeing, and contributing to the governance of the institution	a) Citizenship: demonstrates UQ values consistently b) Internal service: has an established record of achievement and initiative in internal service role/s c) External service: shows evidence of an established record in relation to external service d) Engagement: pursues successful engagement activities and media opportunities e) Leadership: shows leadership of self and others through mentoring, supervision and a responsibility for staff wellbeing	a) Citizenship: demonstrates UQ values b) Internal service: undertakes internal service role/s effectively c) External service: actively pursues agreed goals in external service d) Engagement: actively pursues agreed goals in engagement activities and partnerships e) Leadership: shows leadership of self and others through mentoring and collaboration	a) Citizenship: demonstrates UQ values b) Internal service: undertakes internal service role/s c) External service: collaborates in external service activities d) Engagement: collaborates in engagement activities and partnerships e) Leadership: shows leadership of self through collaboration and active participation in priority activities for the unit

*Appraisers will be directed to specific Examples of Domain activity relating to criteria above. It is expected that appraisers will exercise appropriate judgement in the application of the rating guidelines.

GUIDELINES FOR CITIZENSHIP AND SERVICE DOMAIN PERFORMANCE RATINGS AGAINST CRITERIA				
1. Exceeds expectations. Typically, must demonstrate both a) and b) and two of c), d) or e)				
2. Performing well. Typically, must demonstrate both a) and b) and one of c), d) or e)				
3. Some gaps. Typically, must demonstrate a) and one of b), c), d) or e)				
4. Unsatisfactory. Typically, does not demonstrate a)				

Step 3

Determine Performance rating for each relevant domain (noting Citizenship and Service must be rated)

Rating	Domain			
	Teaching	Research	Supervision and Researcher Development	Citizenship and Service
Exceeds Expectations				
Performing Well				
Some Gaps				
Unsatisfactory				
Not Applicable				

Determining an Overall Performance Rating for Academic Staff

As with the individual domain ratings, consideration should also be given to relative to opportunity factors and consideration of other relevant circumstances in determining the overall rating.

Should the supervisor determine that overriding the guidance above is warranted, the justification should be provided in the relevant Overall Rating section of the APD process.

Further information can be found in the [Academic Annual Performance and Development Policy and Procedure \[5.70.15\]](#)

Overall Rating	Domain Ratings
4 - Exceeds Expectations	4 Exceeds Expectations
4 - Exceeds Expectations	3 Exceeds Expectations, and 1 Performing Well
3 - Performing Well	2 or less Exceeds Expectations, and 2 or more Performing Well
3 - Performing Well	1 Some Gaps, and any combination of higher ratings
2 - Some Gaps	2 or more Some Gaps, and any combination of higher ratings
2 - Some Gaps	1 Unsatisfactory, and no Some Gaps
1 - Unsatisfactory	2 or more Unsatisfactory, or 1 Unsatisfactory and 1 Some Gaps

Professional and Executive Ratings

How Managers apply the rating scale to the goal domains and overall rating

1. Review the goals set and employee evaluation for both '*Delivery*' and '*Citizenship and Leadership*'. Consider the measures that were agreed in the previous year and what your staff member was able to achieve.
2. Consider any feedback you or your staff member may have received.
3. Reflect on your observations throughout the year
4. Consider the four-point rating scale definition as outlined to the right and in the [5.70.01 Executive and Professional Staff Annual Performance and Development - Policies and Procedures](#)

Rating	Description
4 Exceeds expectations	• Performance consistently exceeds expectations and goals are met. Ambitious, or 'stretch', goals are also achieved. • Consistently delivers high quality outcomes at/before timeframes and well above the standards expected of their role and cohort. • Consistently exhibits exemplary standards of UQ values, citizenship behaviours and leadership (where relevant).
3 Performing well	• Performance satisfactorily meets most expectations and goals, or may exceed in one or two areas. • Delivers outcomes within timeframes required, consistent with their current role and cohort. • Consistently demonstrates expected UQ values, citizenship behaviours and leadership (where relevant).
2 Some gaps	• Performance does not meet all expectations and goals, may have met some but not all delivery goals. • Does not consistently meet required work quality, timeframes and output expected of their current role and cohort. • Occasionally demonstrates behaviour below expected UQ values, citizenship behaviours and leadership (where relevant).
1 Unsatisfactory	• Performance does not meet most or all expectations or requirements. • Does not demonstrate skills, knowledge and/or capabilities required for their role and does not produce work to expected standards. • Does not sufficiently demonstrate UQ values, citizenship behaviours and leadership (where relevant).

Reminder - Academic Form 2025/26

In the 2024/25 season, the Academic APD form has been shortened to 6 sections vs 12 sections in previous years.

Additionally, further guidance and specificity has been added around goal setting, clarifying that only activities/priorities/projects that are a specific focus areas for the year to come should be added as goals. This aims to support academic staff setting a lower number of higher quality goals. This will also be of benefit in future cycles by limiting reflections on goals to the most significant activities undertaken.

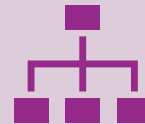
	Sections	Academic APD form – 2023/24	Academic APD form – 2024/25
Documentation	Supporting Documentation	Individual Activity Profile	Individual Activity Profile
Past Performance	Goals	2023 Teaching Goals 2023 Research Goals 2023 Supervision & Researcher Development Goals 2023 Citizenship & Service Goals	Reflection on past goals
	Academic Domain Reflection (pulling in Academic Criteria for current appointment level)	- Teaching - Research - Supervision & Researcher Development - Citizenship & Service	- Teaching - Research - Supervision & Researcher Development - Citizenship & Service
Career & Development	Career & Development	Career & Development Aspirations	Career & Development Aspirations (optional)
Forward Planning	Goals	2024 Teaching Goals 2024 Research Goals 2024 Supervision & Researcher Development Goals 2024 Citizenship & Service Goals	Goals for 2025 (with clarification that only specific priorities/activities should be articulated as goals)
	Summary	Final Reflections	Final Reflections

Individual Activity Profile (IAP) in APD

Uploading of IAP is required as part of Academic APDs with a summary of their achievements across the broad academic activity categories of Teaching, Research, HDR supervision, and Service/Engagement.



IAPs are generated for all continuing and fixed-term academic staff who are on contracts for one year or more. At this stage IAPs are not generated for: Casual Academics, Adjunct or Honorary staff, and Health Professional staff.



HR are not primary owners of IAP system. The IAP profile is created by drawing on many internal and external systems. Some data fields require manual entry by the user.



If specific data isn't appearing you're on your IAP, please consult the area in the IAP Data Sources and Data Entry slide on the next page to contact them directly to support you in your profile. This table also highlights what data is self entered.



[Please refer to the IAP information page](#) which provides all the detail of IAP including helpful links, background information, quick reference videos, support and details in how its connected to Criteria of Academic Performance.

IAP Data sources and data entry

[Click here to access this document](#)

IAP Tab	Data Source	Self-entered items	Contact point
Employment Profile	Aurion and Workday	Nil	For assistance with employment profile data please contact askhr@uq.edu.au .
SECaT	Blue	Nil	For assistance with SECaT data please contact evaluations@uq.edu.au .
Coordination	Jac	Nil	For assistance with course coordination data please contact APP jac.support@uq.edu.au .
Teaching Recognition	National and UQ teaching awards and fellowships listed on this tab are collated and verified by ITaLI. They are bulk-loaded regularly to the IAP. Faculty/School/Other teaching awards are not collated centrally and therefore, at this time, cannot be automatically uploaded onto the IAP.	Nil	For assistance with national and UQ teaching award data please contact teaching.awards@uq.edu.au .
Student Contact	Academic Portal	- Non-HDR supervision – Honours and Coursework - Non-HDR supervision – Placements (Clinical or Applied) - Course contributions (teaching contact – SiNET scheduled courses) - Course contributions (teaching contact) – non-SiNET scheduled courses (e.g. CPDs)	Please see the IAP enhancements explained video (0:46) for information about how to update student contact data.
HDR	SiNET Academic Portal	Non-UQ HDR supervision	For assistance with the non-editable data (current supervision, completions, withdrawals) please contact graduateschool@enquire.uq.edu.au. For assistance in updating the editable fields (Non-UQ HDR supervision) please see the IAP enhancements explained video (4:24).
Scholarly Works and Citation Analysis	InCites (Clarivate Web of Science) eSpace (UQ Library) Academic Portal	- In-press publications - Submitted publications	For assistance with the non-editable data (books, book chapters, articles, conference papers & proceedings, NTRO, other) please contact eSpace@library.uq.edu.au For assistance in updating editable fields (in-press publications and submitted publications) please see the IAP enhancements explained video (6:40).
Grants	Research Master System (Research Office) Academic Portal	- Other grants/projects - Submitted grants - Faculty- and School-based grants	For assistance with the non-editable data (externally funded grants, UQ funded grants) please contact grants-manager@research.uq.edu.au. For assistance in updating editable fields (other grants, submitted grants, faculty and school-based grants) please see the IAP enhancements explained video (7:53).
Network	eSpace (UQ Library)	Nil	For assistance with network data please contact ActivityProfileNetworks@uq.edu.au .
Service	eSpace (UQ Library) – <i>for editorial roles/appointments only</i> Academic Portal	- UQ Service activities - External professional activities - Honorary / adjunct appointments at other institutions	Please see the IAP enhancements explained video (8:26) for information about how to update service data.

APD Learning Support

Learning options available to support the capability uplift of APD processes, skills and behaviours in leading performance and development at UQ.

	APD Foundations	Micro Learning - Performance & Career Development	Leading APD – Local Sessions	Bespoke development requests
Who is it for?	Supervisors/Managers and staff	All Staff including Supervisors and Managers including Performance Development Managers with some	All Supervisors and Managers including Performance Development Managers	Determined by local needs/priorities
Format	30-minute self-paced online course	Micro Learning Series to support just in time learning (from Nov 2025)	Two-hour interactive workshop/locally determined by request	Locally determined
What is the focus	- Understanding the APD process - Process overview and timelines - Roles and responsibilities - Purpose/benefits and how to get the best out of the process - Giving and receiving feedback Career Development - Links to resources and support	Just in time learning, focused on short bursts of useful support that can be readily applied. Topics are to upskill manager, supervisors and staff on how to lead and participate in continuous performance and development at UQ. Focus areas include: - Career development and APD - Preparing for the conversation - Having the conversation - Goal setting and sustaining	- Enhancing skills in performance and development conversations - Providing feedback (positive and constructive) using SBIN model - Conversation frameworks - Frameworks for effective staff coaching/development APD Foundations is a pre-requisite to attending Leading APD	For example: - Understanding and applying the Criteria for Academic Performance within the specific Faculty/ School/ Institute context - Dean/ Head/ Director expectations for consistently applying the ‘Domain’ and Overall performance ratings. - Supervisor expectations for supporting development of staff within the Organisational Unit.
Facilitated by	N/A – Digital Online Course	N/A – Digital Micro Learning Series to support just in time learning	Lead by HR Client Partnering with OCC’s co-facilitation support has needed.	Head of Organisational Unit Supported by HR Client Partnering team

APD Resources and Support

Performance toolkit



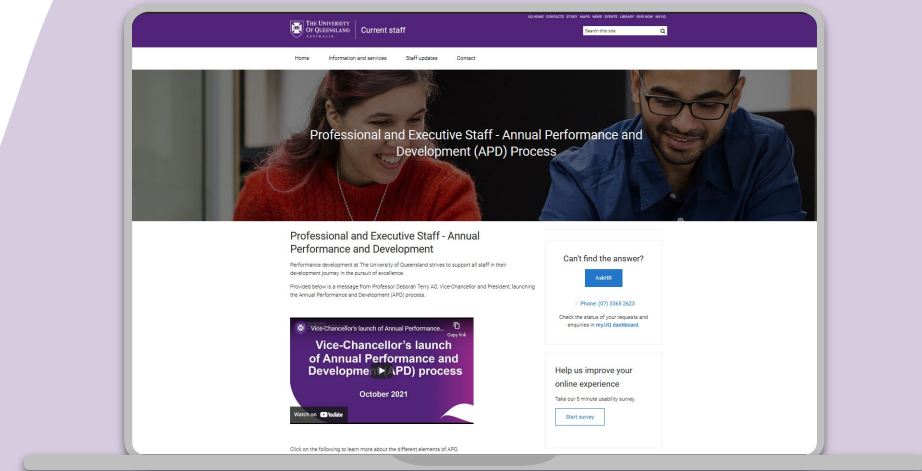
Professional & Executive Goal libraries



Frequently Asked Questions



Supporting guides and videos



APD Resources Website

Contact



AskHR

ask.hr@enquire.uq.edu.au

For responding to general APD
enquiries and questions



HR Client Partnering

central-hr-advisory@uq.edu.au

Local leadership advice and
support regarding APD



Organisational Culture and Capability

Facilitating the overall APD
process