THE UNIVERSITY
OF QUEENSLAND
AUSTRALIA

CREATE CHANGE

Annual Performance and Development Process (APD) Frequently Asked Questions

How can we help?

This guide has some of the APD questions we get asked the most.

You will find a table of contents on the next page for easy navigation or use CTRL + F to find key words relating to your question.

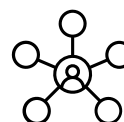**If you don't see what is on your mind, reach out to us at…**

Ask HR

General APD Questions

HR Client Partnering

Local leadership advice, support and detailed questions regarding APD

Organisational Culture and Capability

Overarching UQ wide APD process, feedback and learning

Contents

General APD FAQ's

What is the timeline for APD this year?

Key timeframes

1 September 2025	• APD process is opened for all staff in Workday
7 November 2025	• Self-evaluation is due for Academic Staff
19 December 2026	• Academic APD conversation completed and Manager evaluation due • Self-evaluation is due for Professional/Executive staff
27 February 2027	• Academic process – Head of School / Institute Director approvals due • Professional / Executive conversation and - Manager evaluations due • Employee Acknowledgement due (final step in the process) • APD process closed

Recommended End-to-End APD Process

For further information please refer to the web pages for Professional and Executive APD Process and Academic APD process
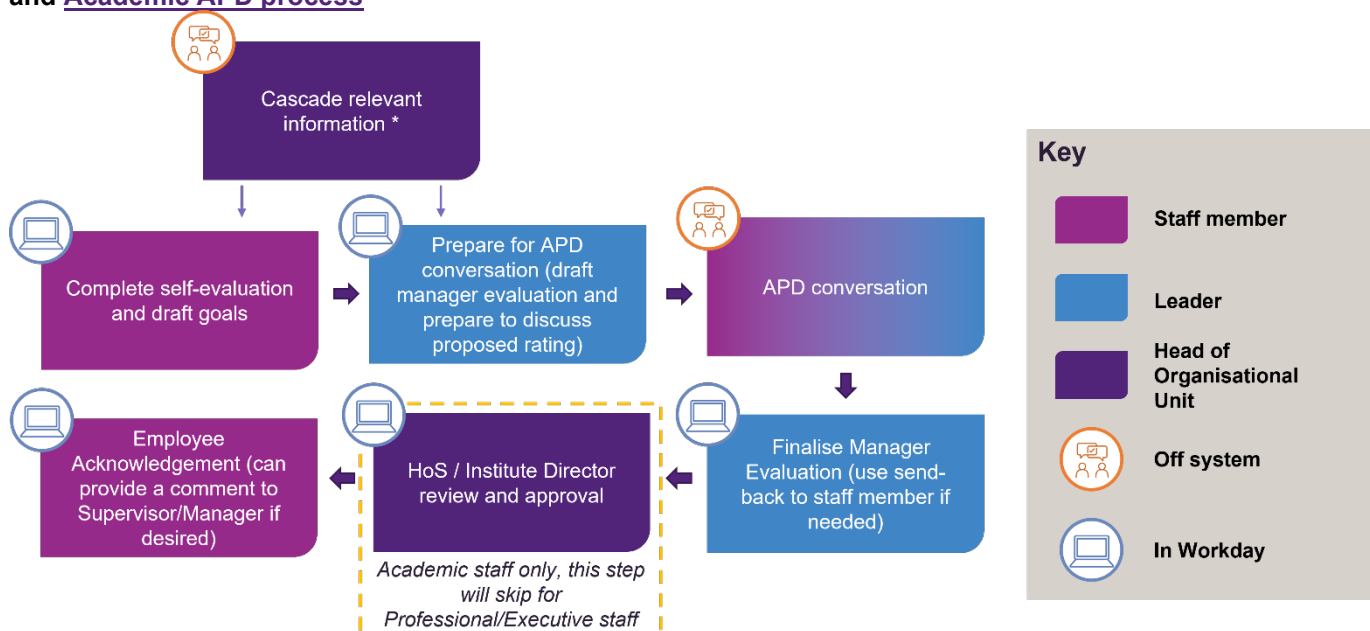
* e.g. strategic planning, expectations, ratings guidance

New to UQ or APD?

How do I "start" the APD process?

You will receive a 'to-do' task in Workday containing the relevant APD template for your cohort (e.g., Academic, Professional, Executive). This template will provide help text and guidance to support you through the process. There are step by step instruction guides provided on the APD resources page to help guide this.

For new staff, upon commencement you will receive a goal setting template in Workday to complete. Following a conversation with your supervisor/manager regarding your goals, this template can be finalised and submitted. This will ensure that your goals are automatically pulled through to the Annual Performance and Development template at the end of the year (as above).

Beyond the formal templates and process steps, the APD process and conversations should be continuous throughout the year with regular check-ins between staff and supervisors/managers.

How do the Probation and APD processes align?

Fixed-term staff member employed for less than 12 months:
Whilst a full review using the APD process is not required, all new staff should set goals in Workday as part of their probationary review process and to guide activity throughout the contract.

Continuing staff (excluding Continuing Academics) or fixed-term staff employed for more than 12 months:
You will set goals in Workday upon commencement, as part of your probationary period noting that these goals may extend beyond of the probationary period into the annual cycle. With your manager/supervisor you will assess achievement of these goals relative to the expectations for the probationary period. Where relevant, you can add or edit goals upon the conclusion of probation as you move into the business-as-usual APD cycle.

Continuing Academic staff (three-year probationary period):
Academic staff on probation are still required to set goals upon commencement and complete the Annual Performance and Development (APD) process in line with the relevant timelines and procedures. While your goals and APD documentation will not form part of your Mid-Term or Final Review submission, the APD provides an opportunity for you and your supervisor to discuss expectations, set goals and for you to receive valuable feedback on your performance in support of these processes.

The academic probation processes are underpinned by the Confirmation and Promotions (Academic Staff) Policy and the Probation and Confirmation of Continuing Appointment (Academic Staff) procedure. Approximately 2 - 3 months prior to the documentation submission date for your Mid-Term or Final Review you will be contacted via email with the required actions and due dates for your submission. The Probation webpage provides additional information and resources about the confirmation process.

I am new to UQ, what do I need to do?

Firstly, welcome to UQ! Depending on when you joined the University and your probation requirements you will join the APD process at different points:

I joined UQ between March and August	You will receive a goal setting template via Workday within a month of starting, and you are encouraged to set goals that can be reasonably achieved prior to the commencement of the APD process. Once the APD process launches, you can engage in both the reflective and future-focussed components of the APD process and conversation. If you have not set goals ahead of APD launch you may wish to use the self-assessment portion of the APD process to reflect on what you have been working on since your commencement, and then the goal setting portion to define areas of focus for the year ahead.
I joined UQ between September and February	If you commence after the APD Process has launched for the year (between September and February), you will receive a goal setting template via Workday within a month of starting. This template can be used to set goals for the coming year, but there will be no self-assessment or rating portion of the template. Your APD conversation will focus on goal setting for the year ahead, and you will be included in the following year's end-to-end APD process.

Where can I go for more support on the APD process?

The APD websites for Academic and Professional/Executive staff contain supporting resources within the Performance and Development Toolkit, including:

- APD Resources page that including supporting step by step guides and supporting tools
- APD Policy and Procedure
- Goal Libraries for each cohort - Academic, Professional and Executive
- Frequently Asked Questions
- APD Learning including APD Foundations

Who completes APD?

How is each cohort of staff defined?

Academic staff – Level A to E

Professional staff – HEW 1 – 10, noting that if a person is a HEW 10 Management level 3 or 4 they are moved into the Executive cohort

Executive staff – Management level 1 to 4, typically, a Head of School and above

Do I need to do APD?

All continuing and fixed-term staff employed for more than one (1) year **are required** to participate in the APD process. *This includes consecutive fixed term appointments that have spanned over and beyond a period of twelve months.*

Staff employed for less than 12 months are **not required** to complete the APD process but are welcome to participate e.g. this is your first year at UQ and you are employed for 6 or 12 months only. If you meet this criteria and require your APD to be cancelled, please email your local HR representative via AskHR for this to be actioned.

Primary roles of Conjoint, Casual, Unpaid, HDR's are **not required** to complete the APD process but are welcome to participate e.g. this is your first year at UQ and you are employed for 6 or 12 months only.

- If you are a conjoint where UQ isn't the primary employer, you may be subject to your primary employers performance process.
- If you're conjoint position is secondary to your primary position, and you hold a continuing or fixed term position and have been at UQ for longer than the initial 12 month appointment, you will be required to participate in APD based on your primary role.

All staff at UQ are encouraged to discuss their performance, goals and career aspirations with their manager/supervisor irrespective of their contract status.

Staff who are not required to participate will still receive the APD template and are encouraged to connect with their manager to have a performance and development discussion and clarify their goals.

For those seeking to participate in a process to formalise goals, they are encouraged to set adhoc goals at anytime via Workday. See **'How do I add or edit my goals'**

NB: If you are considering promotion as an Academic, it is strongly suggested and recommended to complete an APD regardless of contract arrangement as it will be referred to as part of this process.

For continuing Academic staff currently undertaking a three-year probationary period please see FAQ - How do the Probation and APD processes align? and the probation website for further guidance.

My contract ends in a few months, do I need to complete the APD process?

If you are required to do the APD (see FAQ: **Do I need to do APD?**) then yes, you will be required to engage in the process regardless of whether your contract is ending shortly. In these circumstances you may like to focus more heavily on the review aspect of APD. The APD process will also be valuable to facilitate a conversation with your supervisor/manager around goals for the remainder of your contract noting that goals

set will have an aligned timeframe. If your contract is extended, you can amend your goals, as required, in Workday.

I am part-time (on a fractional appointment), do I need to complete the APD process?

If you are required to do the APD (see FAQ: **Do I need to do APD?**) then yes, you will be required to undertake the APD process irrespective of your work pattern.

It is critical that 'Performance Relative to Opportunity' is considered for staff on part-time or fractional appointments, both in terms of the goals set, workload allocated and ultimately how performance is evaluated through the APD process.

I am on a 12-month contract, do I need to participate in the process?

If you are engaged for a standalone contract of 12 months or less then no, you are not required to complete the APD process but are welcome to participate (see FAQ: **Do I need to do APD?**). All staff at UQ are encouraged to discuss their performance, goals and career aspirations with their manager/supervisor irrespective of their contract status.

However, if you are employed on consecutive contracts for a combined period of more than 12 months then you will be required to engage with the APD process. This includes situations where the contracts are in distinct roles or areas of the University.

I have been on long term or parental leave this year, do I need to participate in the APD process?

All continuing and fixed-term staff employed for more than one (1) year are required to participate in the APD process.

You can choose to complete it while on leave or complete it upon your return and for discussion with your Manager/Supervisor on the best arrangement. Your manager will need to retain the task in their Workday Inbox until you return and then send it back to you when you are ready to complete it.

If you are on leave for some of the APD period and have either not set goals or not had sufficient time to make progress on goals, you may wish to focus more heavily on the 2025 goal setting portion to define areas of focus for the year ahead. You can note your leave dates and briefly comment on what you worked on prior to taking leave in the self-assessment portion.

It is important that supervisors/managers consider 'Performance Relative to Opportunity' for staff members who've been on long-term leave in terms of how performance is evaluated through the APD process.

What happens if I have multiple roles at UQ, for example an Academic and a Professional role?

When a staff member has multiple roles at UQ, a 'primary' role will be identified in Workday. Ordinarily, this will be the role which holds the higher fraction (e.g., 60% in role A [primary role], 40% in role B [secondary role]). The supervisor/manager for the 'Primary' role will hold the primary responsibility for assessing the performance and supporting the development of their staff member and coordinating the APD process.

Where relevant, the supervisor/manager for the primary role will liaise with other supervisor/s to obtain their feedback and input into the APD review and goal setting processes.

How does APD work when I have multiple supervisors/managers within one role?

In circumstances where a staff member has multiple supervisors/managers within one role (e.g., an academic role which operates across two organisational units) one person will be identified as the formal 'manager' in Workday. This individual will be responsible for assessing the performance and supporting the development of their staff member and coordinating the APD process.

Where relevant, they will liaise with other supervisor/s to obtain feedback and input into the APD review and goal setting processes. (see FAQ: **I have a second or new supervisor/manager, is there a way I can send this task to multiple supervisors (including my previous supervisor) to review?)**

What do I need to do?

I'm not sure how to use or access the Workday form, what do I do?

Access the Step By Step Guides via the APD Resources page which show you how to navigate Workday to complete the process successfully

As a staff member, what do I need to do?

Each person is responsible for their own development journey at UQ. To own and drive your career journey via the APD process:

- Participate in learning about APD by completing APD Foundations for further information on the APD process.
- Draft your goals and gather any relevant materials ahead of the APD conversation with your supervisor/manager. Submit this via Workday at least a week ahead of the conversation.
- If an APD conversation has not yet been set, you can proactively book time with your supervisor/manager to discuss the achievements of the past year and plan next year's goals.
- Consider any development areas or career aspirations you might wish to discuss.
- Reflect on opportunities to contribute to the broader organisational unit or University strategy.
- Enter the APD conversation with a Growth Mindset ready to both share and listen.
- Access the Step By Step Guides via the APD Resources page which show you how to navigate Workday to complete the process successfully

I am a supervisor/manager, what do I need to do?

As a supervisor/manager your role is critical in the Annual Performance and Development (APD) process. Your role includes (but is not limited) to:

- For further learning, please refer to the APD website for current learning offerings including the online course APD Foundations.
- Schedule the APD conversation with your staff.
- Prepare for the APD conversation by reviewing the staff member's self-evaluation and drafted goals.
- Model and reinforce a dedication to UQ's vision, mission, and values.
- Review and assess staff member performance to achieve alignment, celebrate and build on successes, and flag problems early.

- Determine a rating for each relevant domain (Academic staff) or each goal category (for Professional / Executive staff) as well as an overall rating.
- Diagnose gaps between goals and results (considering the impacts of the individual, team, and UQ more broadly on individual performance) and help create a development plan to close those gaps. Collaborate and clarify the results and timeline required, resources available, and create shared expectations and accountabilities. If required, contact your HR Client Partnering team to create a performance improvement plan.

- Support each team member to solve challenges, identify priorities, and remove obstacles to be more efficient and effective whilst maintaining engagement.
- Plan for the coming year through goal setting. Communicate UQ-wide or organisational unit priorities and help team members set and track goals that link up to these priorities.
- Encourage and support development through coaching, feedback, training, reflection, recommending resources, and making introductions.
- Ask for feedback on how you can better support your team members
- Access the Step By Step Guides via the APD Resources page which show you how to navigate Workday to complete the process successfully

How do I PDF my self evaluation and what will be captured?

- You can access a copy of your APD, by selecting View in the 'Performance Review' tab of the 'Performance' menu in your Workday Profile.

- You **will not** see any of your Manager's comments here until after they have submitted their 'Manager Evaluation' section.

- You will also not see your goals commentary until its completed.

- While visible at this point, the Create New PDF option will not become functional until after the APD has been approved and returned to you.

- Once available, you can use this function to create a full PDF version of your APD, including your Manager's comments, goals details and ratings.

- You will always have visibility of your self evaluation details on Workday, the restrictions on PDF's during the process are due to the security roles set up in the system that facilitates this process.
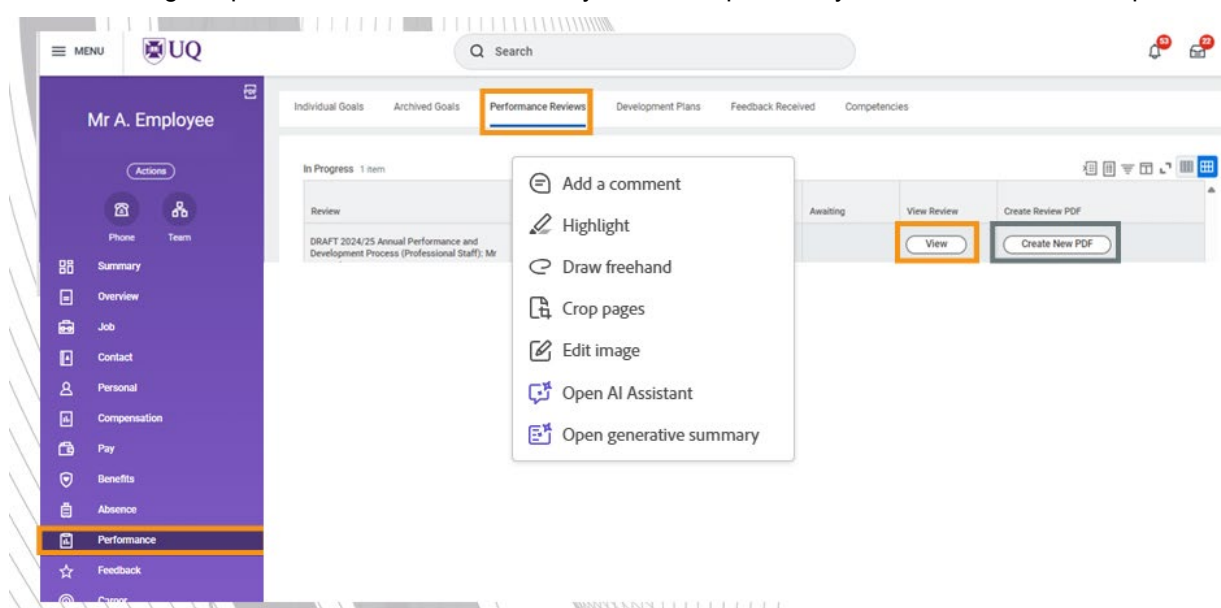
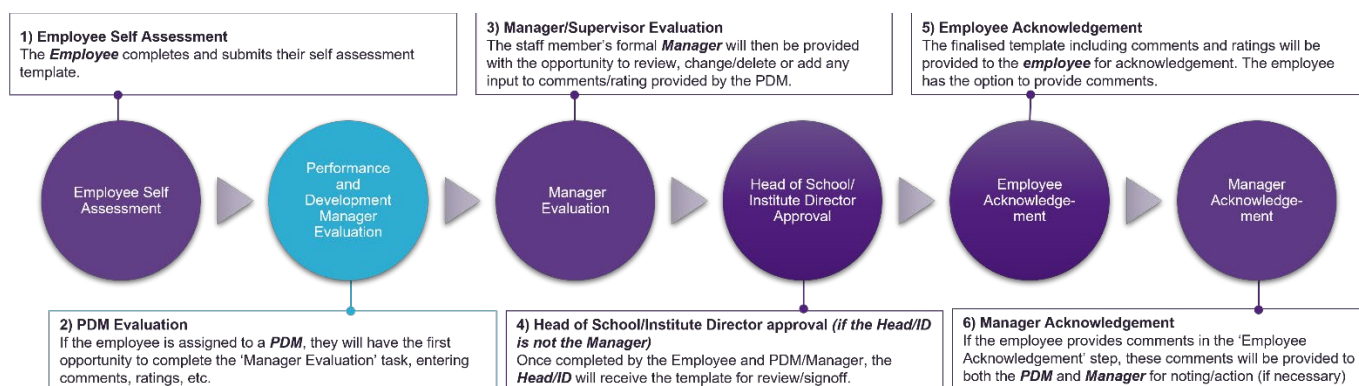# I am a Performance and Development Manager, what do I need to know?

What is a Performance and Development Manager (PDM)?

A Performance and Development Manager (PDM) is a formally assigned role that allows a nominated individual to act as an additional supervisor for staff performance processes, in particular the Annual Performance and Development process.

A PDM will be involved in most performance-related tasks in Workday to ensure staff have a consistent point of contact and support for activities related to their performance and development throughout the year.

What is the APD process if I am a PDM?

Where a PDM relationship is in place, the PDM will act as an additional reviewer between the staff member and formal line manager in the workflow. All other steps will remain as standard.

1) Employee Self Assessment
The *Employee* completes and submits their self assessment template.

3) Manager/Supervisor Evaluation
The staff member's formal *Manager* will then be provided with the opportunity to review, change/delete or add any input to comments/rating provided by the PDM.

5) Employee Acknowledgement
The finalised template including comments and ratings will be provided to the *employee* for acknowledgement. The employee has the option to provide comments.

Employee Self Assessment → Performance and Development Manager Evaluation → Manager Evaluation → Head of School/Institute Director Approval → Employee Acknowledge-ment → Manager Acknowledge-ment

2) PDM Evaluation
If the employee is assigned to a *PDM*, they will have the first opportunity to complete the 'Manager Evaluation' task, entering comments, ratings, etc.

4) Head of School/Institute Director approval *(if the Head/ID is not the Manager)*
Once completed by the Employee and PDM/Manager, the *Head/ID* will receive the template for review/signoff.

6) Manager Acknowledgement
If the employee provides comments in the 'Employee Acknowledgement' step, these comments will be provided to both the *PDM* and *Manager* for noting/action (if necessary)

● Standard process   ● Only if employee has a Matrix Manager assigned

What are my responsibilities as PDM?

In relation to allocated staff, the Performance and Development Manager will:

- Undertake the Annual Performance and Development (APD) process, including the performance conversation, and ensure the process is completed in the Workday system within the deadlines.
- Support and contribute to other staff development and performance processes to ensure that appropriate goals and developmental plans are identified.
- Provide mentoring support to assist allocated staff in meeting their performance, development and career objectives, including discussions around confirmation and promotion readiness (if required).
- Have access to performance documentation stored in the Worker, Talent and Performance Profile in Workday.

For clarity, a PDMs will not:

- Undertake administrative workforce management issues for allocated academic staff, including approving leave applications, remuneration changes, etc.
- Manage staff grievances involving the allocated academic staff member.
- Manage diminished or unsatisfactory performance processes of the allocated academic staff member.
- Undertake or have access to staffing events (such as hiring, secondments, job changes, compensation changes, etc).

- Have visibility of sensitive personal information (identification, emergency contacts, pay, etc.).

As a Performance Development Manager, what do I need to do?

Similar to a primary supervisor/manager your role is critical in the Annual Performance and Development (APD) process. Your role includes (but is not limited) to:

- For further learning, please refer to the APD website for current learning offerings including the online course APD Foundations.
- Schedule the APD conversation with your staff.
- Prepare for the APD conversation by reviewing the staff member's self-evaluation and drafted goals.
- Model and reinforce a dedication to UQ's vision, mission, and values.
- Review and assess staff member performance to achieve alignment, celebrate and build on successes, and flag problems early.
  - Determine a rating for each relevant domain (Academic staff) or each goal category (for Professional / Executive staff) as well as an overall rating.
  - Diagnose gaps between goals and results (considering the impacts of the individual, team, and UQ more broadly on individual performance) and help create a development plan to close those gaps. Collaborate and clarify the results and timeline required, resources available, and create shared expectations and accountabilities. If required, contact your HR Client Partnering team to create a performance improvement plan.
- Support each team member to solve challenges, identify priorities, and remove obstacles to be more efficient and effective whilst maintaining engagement.
- Plan for the coming year through goal setting. Communicate UQ-wide or organisational unit priorities and help team members set and track goals that link up to these priorities.
- Encourage and support development through coaching, feedback, training, reflection, recommending resources, and making introductions.
- Ask for feedback on how you can better support your team members.
- Access the Step By Step Guides via the APD Resources page which show you how to navigate Workday to complete the process successfully

How do I know which staff members I am a PDM for?

If you are nominated as a PDM you will receive a letter advising of the arrangements.

You can also view this information via Workday:

1. Log into Workday.
2. Click on your profile and *View Profile.*
3. Click the Team Icon (located slightly under your name and position).
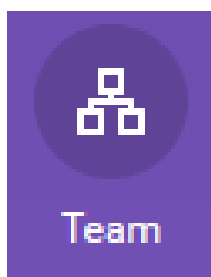
4. Ensure *Include Matrix Reports* are included in the drop-down menu:
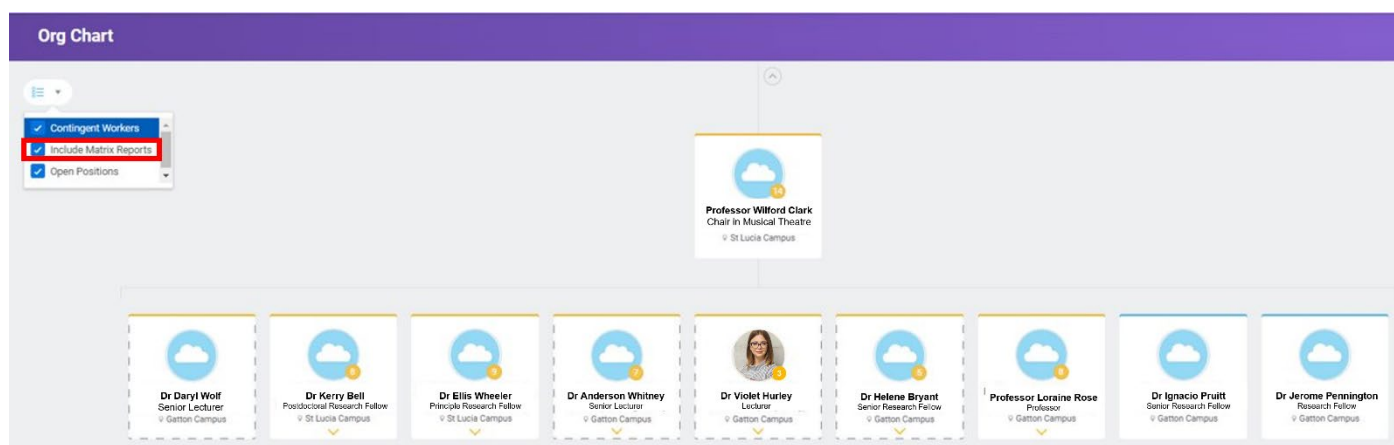
PDM assignments are indicated by a dotted line surrounding them.

Goals and Goal Categories

I didn't set any goals last year OR I don't have any goals in the 2026 section in Workday. What do I do?

The future goal section will never be prefilled with goal information and is there for new goals to be entered each year.

Add your key achievements from the year as goals in the '2026 goals' sections of the template including selecting one goal category per goal. You are encouraged to reflect on these achievements and how you will achieve them as this will support your performance review conversation with your manager.

How do I add or edit my goals?

For detailed instructions on how to add to, amend or update your goals, please view this Quick Reference Guide. Once your updated goals are submitted, your manager will be sent a task to review and approve your goals.

What do I do with a goal that is tagged to multiple goal categories?

When setting new goals for 2026, please choose one goal category, per goal.

If you tag a goal with multiple categories, in future APD's it can leave goals some goal sections without any goals or with incorrectly categorised goals.

If you have tagged a goal to multiple categories and want to move it to a later section:

1. Select the 'X' on the incorrect goal category e.g., 'APD 2025/26 *Professional/Executive – Delivery*'
2. Click on the three dots in the top right corner of the goal and select '*Remove*'
3. To pull in the goal to the correct goal section, once in that section click on the three dots in the top right-hand corner of any goal, click either '*Add one above*' or '*Add one below*'

4. In the search bar select '*All Valid Goals for Selection*' and the goal/s you removed earlier should be available for selection.

## What do I do if I have a goal that carries over from last year to next?

If you have current goals that are ongoing and will continue into 2026, they will not automatically 'carry over' into the 2026 goal setting section of the APD template.

- To review this goal in the ensure the status as 'In progress', ensure the Goal Category selected is the "APD 2024/25 – xxx category", and add any comments as required.
- You will need to manually re-enter the goal into the relevant 2026 Goals section later in the APD template. You will need to update the Goal Category to 'APD 2025/26 – xxx category'
- We encourage a review and update of the detail of the goal to ensure it reflects any updated or new activities for the next year.

Help, I can't see an in-progress goal that was in my APD last year or the year prior?

Goals with earlier year goal categories have been archived to ensure data quality and integrity within Workday and to encourage recent and quality goal setting practices.

- Goals that are completed, in progress or no longer required that have a goal category of 2023/24 or earlier will be automatically archived before each APD season commences.
- To avoid this please ensure that future goals have the correct and updated goal categories of the current APD year
- You can find archived goals in your Performance ribbon, (found if you click on the person head top right corner of Workday/ Select View Profile/ Select Performance on the purple menu and under Goals
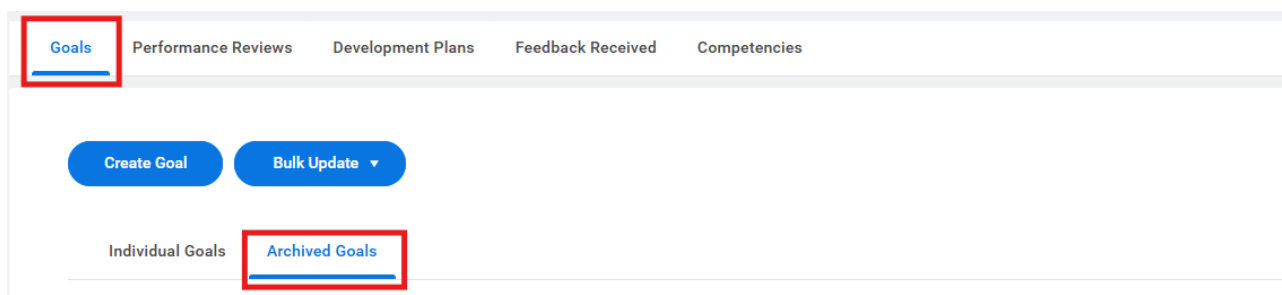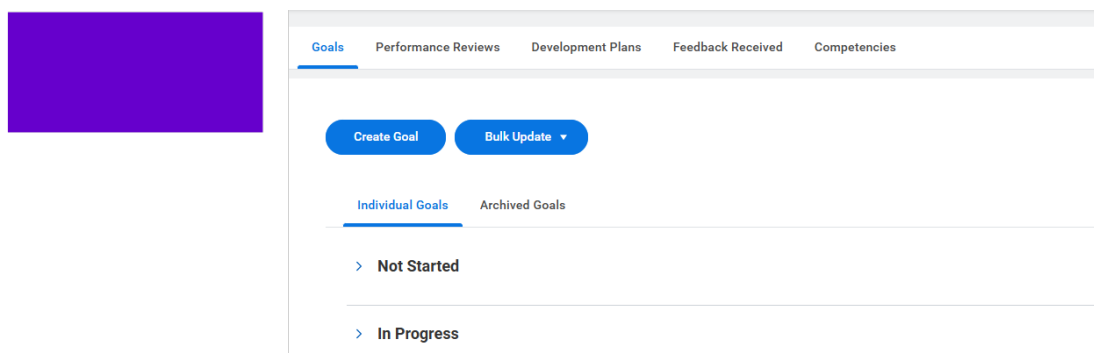

Once the APD is finalised all active goals will be visible in '*My Individual Goals*'. Here you can edit, update, and add additional goals as needed throughout the year.
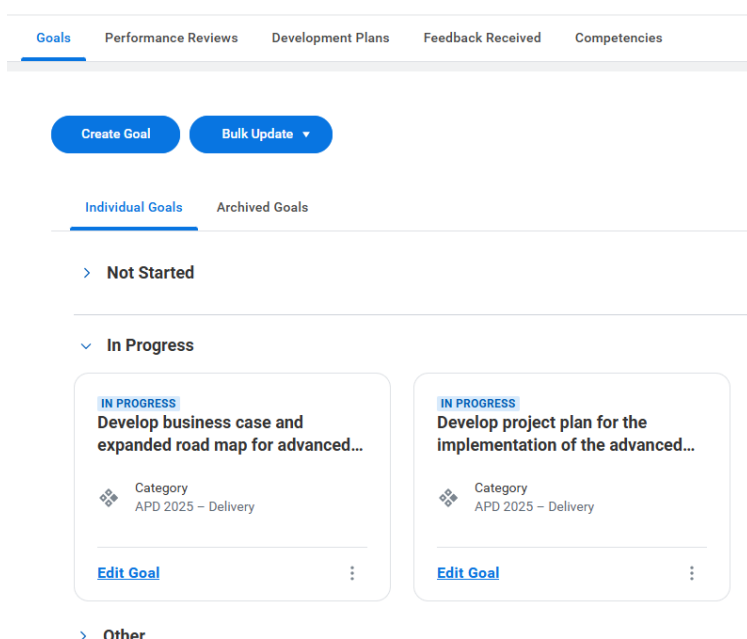
The Goals section on Workday looks different, what's changed?

There has been an upgrade to the Goals section with a recent release in Workday. Goals are grouped by status and visually look different.

Each section drops down to reveal the goals underneath it and goals can be edited, archived, updated or reviewed and at any time. There is also a bulk updates option.

If you are participating APD, please ensure you use the APD template to update and create new goals to avoid any duplications

The career development section looks different, what do I need to do?

The career development section has been given an upgrade to streamline the form. This section remains optional but it does provide an effective and efficient drop-down box to gather and understand your career and development interests which helps your manager, supervisor understand how to support you. This section appears in Academic, Professional and Executive templates.

Career and Development Aspirations (Optional)

This section allows you to reflect on your career aspirations, whether they are for promotion, developing in your current role, pursuing a different career path toward retirement. You can also identify any formal learning or skill development priorities for both current and potential future roles, including participation **Leadership Development Programs** or undertaking a post-graduate qualification through UQ's **Study for Staff** initiative.

To ensure that the APD conversation with your manager is as constructive as possible, it is strongly recommended that you expand on any options selected

Career Preferences select the career and development options you are interested in exploring be it aspiring to a future role, leadership positions, participating in programs, developing skills or mastery of your current position.

Career Interests utilise this free text box to explain the details of what you've selected particularly if you've selected 'Other' in the Career Preferences section above. Please note that if you have had career interests in previous APD's they may appear in this section automatically.

Help! Workday logged out and I lost my progress in my APD!

1. Log back into Workday within 24 hours. Select your profile (your profile image or generic person icon) and then 'Recovery Assistant' towards the bottom of the drop-down menu. The APD template does have auto save functionality

2. Select the task that you would like to recover.

What are the goal categories for each cohort?

For each cohort of staff there are different goal categories:

Professional / Executive goal categories

Delivery	Goals that relate to the core expectations of your role and those that contribute to broader strategy. These may also include stretch goals to aid development Consider role focused goals that contributes to projects, team initiatives, teaching, researching and stretch goals which may including cross skill development.
Citizenship and Leadership	Goals that highlight contributions to culture, collaboration, and leadership at UQ Consider goals describing the actions and experiences taken to role model and live the UQ values and contribute to creating a positive culture. If you are a manager/supervisor, this would include how you model the UQ leadership framework.
Development*	Goals that contribute to your professional and career development. Consider goals focused on your career aspirations, skills or knowledge development. This may be building new skills, efficiencies or contributing to project or research within your current role that will help you grow, reskill, cross skill or reach a new career milestone that includes promotion.

* There is a category specifically for 'Development' goals for Professional and Executive staff which will not be subject to a rating as part of the APD process (see FAQ - **Why is there a specific Development goals section for Professional/Executive staff?**).

Academic goal categories

The Academic goal categories align with the Criteria for Academic Performance:

Teaching
Research
Supervision and Researcher Development
Citizenship and Service

Please ensure to categorise your goals against the relevant goal category (example on next page) as these will flow into the appropriate goals section during your APD in the following year.

Why is there a specific Development goals section (for Professional/Executive staff)?

Each staff member's development needs will be different. Through ongoing development conversations with your manager, ideally you will identify short and long-term development needs as well as professional or career aspirations and be supported to set specific development goals to address these focus areas.

Academic staff are encouraged to set their development goals against the relevant academic domain.

What is the four-point rating scale for Professional and Executive staff?

Rating level	Rating definition for Executive and Professional cohorts
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)
NA - Not Applicable	Not applicable will only be used in circumstances where the employee has been performing the duties of the role for less than six months in the calendar year. For example, if they have recently commenced or have been on extended leave.

Academic Staff

Guidance on the ratings framework for academic staff can be found in the Academic Annual Performance and Development procedure.

What is the process if a supervisor/manager and employee do not agree on the performance rating given?

Whenever possible, it is highly recommended that the discussion over the proposed rating occurs as part of the performance conversation between the staff member and supervisor/manager. Discussing the rating at this point will allow the viewpoints over the rating to be discussed and explained, avoiding the situation where a staff member discovers what rating they receive in Workday without warning.

When there is a disagreement over the rating provided, it is highly recommended that the staff member discusses this with their manager, noting their concerns or other relevant information. If necessary, the process for escalating the concern is outlined in the Professional/Executive and Academic APD procedures.

How do the Probation and APD processes align?

Fixed-term staff member employed for less than 12 months:
Whilst a full review using the APD process is not required, all new staff should set goals in Workday as part of their probationary review process and to guide activity throughout the contract.

Continuing staff (excluding Continuing Academics) or fixed-term staff employed for more than 12 months:

You will set goals in Workday upon commencement, as part of your probationary period noting that these goals may extend beyond of the probationary period into the annual cycle. With your manager/supervisor you will assess achievement of these goals relative to the expectations for the probationary period. Where relevant, you can add or edit goals upon the conclusion of probation as you move into the business-as-usual APD cycle.

Continuing Academic staff (three-year probationary period):

Academic staff on probation are still required to set goals upon commencement and complete the Annual Performance and Development (APD) process in line with the relevant timelines and procedures. While your goals and APD documentation will not form part of your Mid-Term or Final Review submission, the APD provides an opportunity for you and your supervisor to discuss expectations, set goals and for you to receive valuable feedback on your performance in support of these processes.

The academic probation processes are underpinned by the Confirmation and Promotions (Academic Staff) Policy and the Probation and Confirmation of Continuing Appointment (Academic Staff) procedure. Approximately 2 - 3 months prior to the documentation submission date for your Mid-Term or Final Review you will be contacted via email with the required actions and due dates for your submission. The Probation webpage provides additional information and resources about the confirmation process.

What is the new four-point rating scale?

Guidance on the ratings framework for academic staff can be found in the Academic Annual Performance and Development procedure.

What is the process if a supervisor/manager and employee do not agree on the performance rating given?

Whenever possible, it is highly recommended that the discussion over the proposed rating occurs as part of the performance conversation between the staff member and supervisor/manager. Discussing the rating at this point will allow the viewpoints over the rating to be discussed and explained, avoiding the situation where a staff member discovers what rating they receive in Workday without warning.

When there is a disagreement over the rating provided, it is highly recommended that the staff member discusses this with their manager, noting their concerns or other relevant information. If necessary, the process for escalating the concern is outlined in the Professional/Executive and Academic APD procedures.

I am an Academic staff member, what do I need to know?

FAQ: How do the Probation and APD processes align?

What is the four-point rating scale for Academic Staff?

Guidance on the ratings framework for academic staff can be found in the Academic Annual Performance and Development procedure.

How do Academic promotions align with APD?

For Academic staff applying for promotion in 2025, the promotion process will use the current Criteria for Academic Performance (PPL 5.70.17).

A requirement to apply for promotion (under section 2.1 of the *Promotion of Academic Staff procedure* (PPL 5.41.04)) includes the completion of your most recent Annual Performance and Development (APD) process. If you are considering applying for promotion your APD should include conversations around promotion readiness conversations

It is important to note that your APD documentation will not form part of your promotion application that is provided to the Committee. Further information and guidance are available via the Academic Promotion website.

What is the Individual Activity Profile (IAP)?

Individual Activity Profiles (IAPs) are visual representations of the key indicators of an individual's academic activity, across teaching, research and service/engagement. These representations provide academics and their supervisors with performance data that enables them to assess their contributions and performance and to plan and structure future activity in accordance with the goals and directions of the organisational unit and the University.

It is recommended that Academic Staff review their Individual Activity Profile ahead of the APD process to ensure that information is correct and complete.

- 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.

- The IAP profile is created by drawing on many internal and external systems, and not all encompassing by HR. 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 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.

For queries relating to incomplete or inaccurate data on your IAP, please contact the following referral points:

- Employment data query: please contact AskHR.
- SECaT data or course coordination query: evaluations@uq.edu.au
- Teaching Recognition data query: teaching.awards@uq.edu.au
- HDR data query: graduateschool@enquire.uq.edu.au
- Scholarly Works or Citation data query: eSpace@library.uq.edu.au
- Grants data query: ActivityProfileGrants@uq.edu.au
- Network data query: ActivityProfileNetworks@uq.edu.au

How have the previous appraisal forms transitioned into the APD process?

From October 2022 and the launch of APD, previous Appraisal forms will no longer be used. The alignment between the new and old forms is outlined below.

Form A

**Enhanced Individual
Activity Profile (IAP) +**
Comment boxes in APD Template

Form C

APD Template
Domain and overall rating section

Form B

APD template
Goals sections
Career Aspirations section

Form D

Head/Director Report
New Workday Template
Sections are identical to Form D

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Contact details

AskHR

For general or detailed questions regarding APD please contact AskHR.

HR Client Partnering

For local leadership advice and support, regarding APD, please contact HR Client Partnering.