

**TOOL 3.3**

PROGRESS MEETING AGENDA

GUIDE FOR EMPLOYERS AND

EMPLOYEES IN USING THIS TOOL

The tool provides an outline to guide regular, informal discussions between employers and employees during the course of the year. After each meeting, the agenda should be filed in the employee's record. This tool should be reviewed and tailored to meet the needs of the service.

If significant issues are raised, a further meeting or additional discussions can be arranged to explore and document any actions or changes to Section A of [Tool 3.2 Performance Development Plan and Evaluation Record](#TOOL3_2_PERFORMANCE_DEV_PLAN) as necessary.

These meetings should be held between the employee and the person they report to (Line Manager) or the person who has been appointed to manage the process of employee development with the individual employee (e.g. Teacher, Nominated Supervisor or Educational Leader).

The following is a brief description of the matters that can be discussed under each of the items in this sample agenda. Please note that not all matters need to be discussed at every meeting, and depending on

how regularly these meetings occur, the agenda can be tailored to suit individual needs.

1. Welcome
   * Welcome the employee, ensure they are comfortable, and explain the purpose of the meeting.
   * Some employees may be nervous when they come to a meeting, and it is important to set a positive and welcoming tone at the start and reassure them that the meeting is informal and will help them to reflect on their progress, and assist in identifying other support they may require.
2. Employee wellbeing and OHS check
   * Seek clarification/feedback about any practices at the service about supporting the health, safety and wellbeing of the employee.
   * If the employee raises any concerns about their health, safety or wellbeing, these should be documented. In consultation with the employee, explore ways in which the employee’s concerns may be addressed. Further discussions or a follow- up meeting may be required in some instances depending on the nature of concern raised.
   * Provide the employee with a clear understanding of the actions you will take to explore these concerns further. Document the actions you will take and a timeframe within which you can complete them if that is appropriate.
3. Update on current work priorities and progress towards agreed performance indicators / goals
   * Refer to the performance indicators / goals agreed at the start of the performance period and seek an update from the employee on current work priorities

and how they are progressing towards achieving them.

* + Encourage the employee to raise any concerns they may have or barriers they may be facing in achieving their goals, and what additional support they may require.
  + Document these concerns and support needs identified by the employee and the actions you will take to address them. Provide a clear timeline for when you will implement these actions. This may require a further discussion.



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1. Professional development update/progress
   * Refer to the professional development in Section A of [Tool 3.2 Performance Development Plan and Evaluation Record](#TOOL3_2_PERFORMANCE_DEV_PLAN) that has been identified and seek an update from the employee on how they are tracking towards undertaking the identified/ approved professional development.
   * Identify any barriers to achieving the professional development plan, and together with the employee, identify solutions.
   * Document the above and clearly indicate the actions you will take and the timeline within which it will be done.
   * If an employee is working towards a qualification relevant to their profession/role, discuss how it is progressing.
2. **Employer and employee feedback**

* Use this part of the meeting to provide feedback to the employee on their performance and acknowledge any achievements. Validating an employee’s contribution is a great way to improve morale and employee engagement.
* Seek feedback from the employee on how they feel about the support you are providing and whether anything needs amending in Section A of [Tool 3.2 Performance Development Plan and Evaluation Record](#TOOL3_2_PERFORMANCE_DEV_PLAN). This will also assist the employer representative/Manager to reflect on the way they are supporting and guiding the employee.
* In situations where an employee’s performance is not meeting the standards in your service, this part of the meeting is an ideal opportunity to raise the concerns and have an open and constructive conversation about the matter.
* Document any concerns raised, and any improvement plan/strategy that you have agreed with the employee.

1. Any other matters
   * This is an opportunity for both employer and employee to raise any other matters that are not covered in the agenda that are appropriate to be discussed in these meetings e.g. child safety.
2. Next meeting and matters for discussion at next meeting

Agree/confirm the date and time for the next progress meeting.

Agree on items for discussion at that meeting, such as the action items agreed in this meeting, any other known events, etc. Please note, this does not preclude either the employer or employee from adding other matters to the agenda when the meeting is actually held.

Refer to the Managing Performance Related Concerns resource for information and tools on this process.

**TOOL 3.3**PROGRESS MEETING AGENDA *(continued)*



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PROGRESS MEETING AGENDA *(continued)*

PROGRESS MEETING AGENDA

Date:

***Participants:***

Employee Name:

Employer representative/Manager:

ITEMS FOR DISCUSSION:

* 1. Welcome
  2. Employee wellbeing and OHS check
  3. Update on current work priorities and progress towards agreed performance indicators / goals
  4. Professional development update/progress
  5. Employer and employee feedback
  6. Any other matters
  7. Next meeting and matters for discussion at next meeting