



## The HR Staff Accountability, Performance & Development DIY Resource Manual



Establishing an
effective
Performance
Management &
Succession
Planning Program
in your organization

Maximising Staff Accountability, Contribution, Effectiveness and Bench-Strength

#### 1.0 Introduction

Welcome to the HR Department Staff Accountability, Performance and Development DIY Resource Manual Sneak Peek.

It contains 85+ pages of models, guidelines, processes and template administrative forms that enable you to create an integrated performance management program within your organisation.

To assist you in achieving the best possible outcome, we have provided our content to you in two separate formats, being Adobe PDF and Microsoft Word. The first provides you with a master – copy of the original template you purchased, while the second provides you with a version that can be progressively updated/amended in accordance with changing circumstances within your organisation or the external market - place.

At Moore HR, we provide a diverse range of Strategic HR Management programs, services and DIY tools that will (firstly) optimise workforce management and performance in your organisation and (secondly) elevate the Human Resources Department's role, contribution and recognition throughout the business.

Our services are all centrally focussed around the following five Advanced HR Management Capabilities and Competencies that we have researched, tested and successfully applied across a diverse range of organisations over the past 25 years: -

#### **Our Four Advanced Core Capabilities for Every HR Department**

- Optimising Workforce Governance & Environment
- Optimising Workforce Efficiency & Expenditure
- Optimising Workforce Performance & Effectiveness
- Optimising Workforce Planning & Sustainability

#### Our New-Age Core Competencies for Every HR Professional

Optimising Human Resources Advocacy & Persuasiveness

If you are interested in learning more about our services and how they can benefit your organisation, please feel free to email me at **enquiries@moore-hr.com.au** or call me on **03**) **9994 5193**.

We trust that your HR Department Staff Accountability, Performance and Development DIY Resource Manual will be a worthwhile addition to your HR Department resource centre.

Kind Regards,

Stephen Moore Founder & Director

Moore HR



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# The HR Staff Accountability, Performance & Development DIY Resource Manual – Creating Effective Position Descriptions



Maximising Staff Accountability,
Contribution, Effectiveness and Bench-

Strength

Establishing an
effective
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#### **Performance Management & Succession Planning Model**

#### Start

#### **Position Descriptions**

Describes areas of day-to-day accountability applicable to each employee's role, plus core competencies and desired behaviours

#### **Succession Planning**

Identifying & developing high potential employees capable of performing designated senior roles within the organization

#### **Performance Appraisal**

Provides employees with objective feed-back regarding their overall performance throughout the course of the assessment period

#### **Key Performance Objectives**

Describes value-added projects employees are accountable for completing throughout the course of the organisation's fiscal year. (Should be linked to the annual business plan)

#### **Performance Reviews**

Provides employees with structured feed -back regarding their work performance against agreed standards

### 360 Degree Feedback

Provides designated executives with clear and objective feedback from a selection of their peers and subordinate staff

#### 1.1 POSITION DESCRIPTIONS - KEY PRINCIPLES & PROCESSES

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- 1.1.1 In any organisation the tasks that employees perform can generally be identified and separated into two distinct categories. The first comprises those day-to-day accountabilities that must be consistently fulfilled in order to satisfy stipulated job expectations. The second category comprises those additional objectives an employee takes on during the course of a financial year which add-value to the organization and contribute, (directly or indirectly) to the achievement of the annual business plan.
- 1.1.2 These two separate areas of accountability are illustrated in the Performance Management and Succession Planning and Model as illustrated on the previous page (6), where day-to-day accountabilities form an integral part of the first module on Position Descriptions and value added projects are incorporated into the second module on Key Performance Objectives.
- 1.1.3 In terms of executing the first module of the Performance Management and Succession Planning Model, in collaboration with Department Managers, the HR Department will oversee the development of Position Descriptions which clearly identify: -
  - Major areas of day-to-day accountability,
  - The minimum acceptable standards to be met against each such area of accountability,
  - The designated performance measures by which the incumbent employee can be objectively evaluated.
- **1.1.4** In order to achieve the best possible results, Position Descriptions will be developed and maintained by HR utilizing the following five options: -

#### **Generic Roles**

Where multiple employees are performing the same role within the same function or department, (I.e., Sales Executives or Customer Service Officers), in the first instance the HR Business Partner will instigate a small working party who shall be responsible for developing a draft Position Description to be submitted to the Department Manager for input and review. Thereafter the HR Business Partner will submit the final version to the HR Department for evaluation, particularly in relation to any similar roles that may exist within other business departments or locations.

#### **Specialist/Individual Roles**

Where an existing position is occupied by an individual employee, in the first instance the HR Business Partner will liaise with the current incumbent in completing and submitting a draft a Position Description to the Department Manager for input and review. Thereafter, the HR Business Partner will submit the final version to the HR Department for evaluation and where necessary internal bench – marking.

#### 1.1 POSITION DESCRIPTIONS - KEY PRINCIPLES & PROCESSES

#### **Internal Appointments**

Where a decision is made to promote/appoint a current employee into a newly created role, the HR Business Partner will liaise with the new incumbent in completing and submitting a draft a Position Description to the Department Manager for input and review. Thereafter, the HR Business Partner will submit the final version to the HR Department for evaluation and where necessary internal bench – marking.

#### **New Hires**

Where a decision is made to create a new role that is to be advertised externally, initially the HR Business Partner will liaise with the Department Manager in developing a draft Position Description, to be submitted to the Human Resources Department thereafter for final evaluation and approval to proceed.

#### **Annual Review and Amendment**

Once established and in-place, all existing Position Descriptions shall be reviewed as an integral component of the annual Performance Appraisal process to ensure that they remain up to date, reflect current practice, and that the prevailing performance measures remain relevant and achievable.

**1.1.5** A copy of all completed or amended Position Descriptions shall be maintained within the Human Resources Department for comparative/internal bench - marking and recruitment purposes.

#### 1.2 POSITION DESCRIPTIONS - FORMATTING LOGIC

- 1.2.1 The information to be completed on the first page of the standard Company Position Description template (As illustrated on page 9) is useful to the employee in understanding the overall purpose of their position but is also of benefit within the company should the position become vacant into the future. The details regarding desired experience and qualifications can be utilised in determining the preferred credentials and profile for the replacement employee, for use in either an internal or external recruitment process.
- **1.2.2** Additionally, this information (as well as that contained within the remainder of the Position Description) can be utilised by the Remuneration & Benefits Department in determining a suitable job evaluation range or grading.
- **1.2.3 Position Scope** should provide an overview of the prevailing environment in which the position operates, while **Overall Position Purpose** should succinctly describe the central purpose and overall objective of the position. **Position Parameters** should detail the minimum qualifications, skills, experience and personal attributes required for the incumbent employee to perform at a competent level.

Sample Populated Position Description Template (Page One)			
Position Title:	Department Manager - Human Resources		
Department:	Human Resources	Location:	Corporate Office - Melbourne
Reports to (Title):	Chief Executive Officer	Date Prepared:	1/6/2020
Evaluated by:	Chief Operating Officer	Approved By:	Chief Executive Officer

#### **Position Scope:**

This position is a member of the Company's senior management team and is responsible for the overall development and delivery of Human Resources services to the Company's 2,000 employees located at its ten sites throughout Australia. The incumbent is directly accountable for the corporate Human Resources Department and for all site based Human Resources functions.

#### **Overall Position Purpose:**

To establish, implement, and sustain human resources strategies, policies, programs and procedures that optimise workforce productivity, capability, satisfaction and engagement, thereby directly contributing to the achievement of Company business plans and objectives.

#### **Position Standards:**

- Minimum fifteen to twenty years' broad experience in Human Resources, preferably with an engineering, technical or manufacturing environment.
- Tertiary qualifications in either Human Resources, employee relations, education or psychology, commerce or economics.
- Demonstrated experience in managing a diverse function and substantial team.
- Advanced strategic planning, inter-personal and communication skills.
- Exposure and understanding of analytical HR Management principles.
- Commercial acumen and business/operational focus.

#### 1.2 POSITION DESCRIPTIONS - FORMATTING LOGIC (CONTINUED)

- 1.2.4 Once the Position Summary page has been completed, the remainder of the Position Description content (as illustrated on the following pages) defines the fundamental accountabilities, standards and outputs for each major job function to be undertaken: -
  - Key Position Accountabilities identify the principal areas the position is accountable for on a day-to-day basis.
  - Minimum Standards describe in bullet points the key activities or tasks which must be carried out to achieve each of the defined Key Position Accountabilities.
  - Performance Measures define the desired outcomes or outputs to be achieved to successfully perform against all the prescribed minimum standards.
- 1.2.5 Under normal circumstances there should be a "cascading affect" between the Key Position Accountabilities, Minimum Standards and Performance Measures established for a Department Manager and those of subordinate employees in the same area. As such, Position Descriptions developed for subordinate employees should generally reflect a subset of the accountabilities and measures that contribute to those established for their immediate manager.
- **1.2.6** Position Descriptions established for Department Managers are likely to be broad-based and more general in content, while those established at lower levels are likely to be much more specific and definitive in terms of function, accountability and measurement.

What are the key components that comprise the employee's day-to-day (inescapable) position accountabilities?  What does this mean that the employee is accountable to achieve?  What does this mean that the employee is accountable to achieve?			How will the employee (and their manager) know if they have been successful?
Key Position countabilities	Minimum Standards	Performance Measure	es

## Sample Populated Position Description Position Title: Department Manager - Human Resources

Key Position Accountabilities	Minimum Standards	Performance Measures
Workforce Recruitment & On-Boarding	To ensure that suitably experienced and competent employees are attracted and effectively procured to meet ongoing Company operating requirements	<ul> <li>(Insert Agreed Target - Days) average vacancy duration rate</li> <li>(Insert Agreed Target -\$) average vacancy \$ cost</li> <li>(Insert Agreed Target -%) new hires achieving 12 months' service</li> <li>(Insert Agreed Target -%) new hires satisfied with employment decision</li> </ul>
	To establish and maintain effective governance practices that create a fair, equitable, welcoming and accommodating workplace for all employees	<ul> <li>(Insert Agreed Target – Nbr) unfair dismissal claims</li> <li>(Insert Agreed Target – Nbr) harassment/discrimination claims</li> <li>(Insert Agreed Target – Nbr) workplace abuse/vilification claims</li> <li>(Insert Agreed Target – Nbr) gender equity claims</li> </ul>
	To establishing harmonious, cooperative relationships with employees and their representatives at all levels of the organization	<ul> <li>(Insert Agreed Target - Nbr) formal grievances lodged</li> <li>(Insert Agreed Target - Nbr) lost hours/days through disputation</li> </ul>
Workplace Relations	To establish and utilise integrated workforce analytics & reporting that inform and enable optimum workforce productivity and efficiency	<ul> <li>(Insert Agreed Target -%) net enterprise bargaining cost during life of agreement</li> <li>(Insert Agreed Target -%) total annual labour cost Vs annual sales/revenue</li> <li>(Insert Agreed Target -%) total annual labour cost Vs annual operating expenditure</li> </ul>
	To develop and maintain an internal communications program that enhances workforce trust, alignment and support for Company objectives and initiatives	<ul> <li>(Insert Agreed Target – Nbr) established, self-directed work - teams</li> <li>(Insert Agreed Target – Nbr) established problem-solving teams</li> <li>(Insert Agreed Target – Nbr) established cross-functional project teams</li> <li>(Insert Agreed Target - Number) workforce surveys completed</li> <li>(Insert Agreed Target - Number) workforce focus groups completed</li> </ul>

## Sample Populated Position Description Position Title: Department Manager - Human Resources

Key Position Accountabilities	Minimum Standards	Performance Measures	
Workforce Training & Development	To establish and implement an integrated training strategy that equips employees with the essential skills and capabilities necessary to optimize their performance	<ul> <li>(Insert Agreed Target - Number) training &amp; skills development training courses offered per annum</li> <li>(Insert Agreed Target - Number) training &amp; skills development training courses attended Vs total eligible employees</li> <li>(Insert Agreed Target - %) training course attendance</li> <li>(Insert Agreed Target - %) training course pass rate</li> <li>(Insert Agreed Target) - %) training course satisfaction rate</li> </ul>	
Workforce Performance & Accountability	To establish and maintain an effective Performance Management program throughout the company	<ul> <li>(Insert Agreed Target - %) up-to-date position descriptions in place</li> <li>(Insert Agreed Target - %) half yearly assessments completed</li> <li>(Insert Agreed Target - %) annual appraisals completed on time</li> <li>(Insert Agreed Target - %) of staff action plans developed and successfully implemented</li> <li>(Insert Agreed Target - %) formal employee grievances received</li> </ul>	
	To establish and maintain an effective Workforce Planning program throughout the organisation	<ul> <li>(Insert Agreed Target - %) forecasts approved &amp; incorporated into budgets</li> <li>(Insert Agreed Target - %) positions identified as critical staff shortages</li> </ul>	
Workforce Planning & Resourcing	To establish and maintain an effective Succession Planning/Talent Management program throughout the company	<ul> <li>(Insert Agreed Target - %) critical roles with at least one identified successor</li> <li>(Insert Agreed Target - %) of critical roles filled by internal appointments</li> <li>(Insert Agreed Target - %) talent pool individual talent plans on target/completed to plan</li> <li>(Insert Agreed Target - %) talent pool participants achieving potential</li> </ul>	

## Sample Populated Position Description Position Title: Department Manager - Human Resources

Key Position Accountabilities	Minimum Standards	Performance Measures	
Workforce Leadership Development	To establish an integrated leadership development program that reinforces desired company values, culture and workforce relationships	<ul> <li>(Insert Agreed Target - Number) leadership development training courses offered per annum</li> <li>(Insert Agreed Target - Number) leadership development training days Vs total eligible employees</li> <li>(Insert Agreed Target - %) training course attendance</li> <li>(Insert Agreed Target) - %) training course satisfaction rate</li> </ul>	
Workforce Administration & Support	To establish and maintain an effective payroll and employee personal record-keeping system	<ul> <li>(Insert Agreed Target -%) errors and adjustments per annum</li> <li>(Insert Agreed Target -%) errors in employee personal record files annual internal audit</li> </ul>	
	To establish and maintain an effective Leave Management system	(Insert Agreed Target - \$) annual leave liability provisional account costs	
Workforce Health & Safety	To develop and maintain an integrated strategy to minimise workplace injuries and incidents	<ul> <li>(Insert Agreed Target - \$) annual worker's compensation cost</li> <li>(Insert Agreed Target- \$) cost per employee</li> <li>(Insert Agreed Target- %) annual \$ cost Vs annual sales/revenue</li> <li>(Insert Agreed Target - %) annual frequency rate</li> <li>(Insert Agreed Target - Days) annual duration rate</li> </ul>	
Workforce Remuneration & Benefits	To develop competitive and fair remuneration and benefit policies which attract, reward and retain competent employees on a an equal	oolicies which attract, reward and • (Insert Agreed Target -%) bonus eligibility rate	
Workforce Risk Management	To ensure strategies are in place which ensure that the Company complies with all relevant workforce legislation, laws and regulations	(Insert Agreed Target - Number) fines, prosecutions or litigation for non-compliance	

#### 1.2 POSITION DESCRIPTIONS - FORMATTING LOGIC (CONTINUED)

1.2.7 Core Competencies and Desired Behaviours describe the skills and behaviours the organization expects the incumbent employee will demonstrate/practice on an ongoing basis as they undertake their stated position accountabilities

A Position Description that does not incorporate Core
Competencies and Desired Behaviours is thereby primarily
focussed upon the key outputs the employee must deliver,
without providing any balance or understanding that to be
truly effective in their role, it is not only what they do but how
they do it that shall be considered in the overall evaluation
process

JOE	S KNOWLEDGE	MAN RELATIONS SKILLS	
a)	Displays essential levels of professional and technical expertise necessary to effectively perform the role	Trains and develops subordina operating requirements	te employees to meet future Company
b)	Demonstrates sound business acumen and a general understanding of overall Company operations, objectives and operating philosophy	Displays empathy and underst weaknesses and provides ong	anding of employee's strengths and oing guidance and support
c)	Possesses sufficient knowledge of areas, disciplines and functions with which the position relates	Communicates and effectively maximise departmental produc	motivates employees at all levels to ctivity and performance
		Articulates ideas fluently, clear	ly and persuasively
		Actively seeks feedback and con others	onsiders own performance and impact
APF	PLICATION	DBLEM SOLVING SKILLS	
a)	Self-motivated, high energy level, action orientated and a strong desire to achieve.	Learns rapidly and grasps com	plex or abstract concepts.
b)	Dependable and reliable, readily accepting responsibility to meet deadlines with minimum direction.	Thinks logically, critically and a	nalytically.
c)	Continually considers more effective and productive ways to achieve individual and departmental objectives	Exercises sound, practical bus	iness judgement.
d)	Persistent and tenacious in following through to achieve desired results.	Is innovative and creative, con productive ways to achieve but	tinually considering more effective and siness objectives
e)	Seeks out and incorporates information from others and utilises productively.	Thinks with a broad perspective	e and relates diverse ideas.
LEA	ADERSHIP SKILLS	IAVIOURS	
a)	Organises and plans effectively utilising time and available resources to best achieve objectives.	Delivers value and service to in	nternal and external customers always
b)	Gives clear and concise direction to employees including timely, honest and effective follow up.	Always treats other employees courtesy	and customers with respect and
c)	Displays a flexible, adaptable approach to meet changing priorities and demands.	Communicates in an open, hor	nest and credible manner at all times
d)	Integrates and coordinates efforts of subordinates to achieve departmental and Company objectives.	Willingly trusts and supports permanagers	eers, subordinate employees and
e)	Communicates verbally or in written form in a concise, effective manner.	Promotes and effectively partic activities	sipates in team building and team-based
		Actively seeks out and recogni performance beyond normal ex	ses employee achievements and

	Some of Our Many Satisfied DIY Customers - *Denotes Custom Designed Programs				
1.	Cisco Systems	31. Cabrini Hospital Group*	61. TAL*	91. Sydney Water*	
2.	Revlon	32. Panasonic	62. JNH Australia*	92. Frank Knight Australia	
3.	House of Reps Canberra	33. Ticketek	63. Hawthorn Football Club*	93. Vemco Pty Ltd	
4.	NHP Electrical Engineering*	34. Australian HR Institute*	64. Cricket Australia	94. Deakin University*	
5.	EMI Music Australia	35. Orix Australia	65. Haymes Paint*	95. McLarens Young*	
6.	Jeans West	36. Caterpillar Australia	66. Rayson Industries	96. Primelife Corporation*	
7.	ESANDA Fleet Partners	37. Baytech Institute	67. Cap XXX	97. Capital Finance	
8.	Local Government QLD*	38. Swimming Australia*	68. Hume City Council	98. Dept of Education WA	
9.	Victorian Cricket Association	39. Simplot Australia	<b>69.</b> Rural Ambulance Victoria	99. Mellons*	
10.	Sims Lockwood	40. Fawkner Cemetery	<b>70.</b> Integrated Design Services	100. Aus Chamber Orchestra	
11.	Woollahra Council	41. Victorian Public Sector Commission*	<b>71.</b> Biolab Australia	101. Aust Admin Services	
12.	Suncor Energy	42. Armstrong Industries	72. Integrated Vision*	102. Co-Invest Limited	
13.	Telefix	43. Financial Planning Association	73. Yallourn Energy	103. McManus & Associates	
14.	Trader Systems International*	44. Mainland Dairies	74. Filcon Precision Engineering	104. Millennium Chemicals	
15.	South East Water*	45. Melbourne Victory Football Club*	<b>75.</b> Beltreco Ltd Victoria	105. Govt Superannuation Board	
16.	DC Australia	46. City of Wyndham	76. URS Corporation*	106. Telefix	
17.	City West Water*	47. Southcorp Packaging	77. Wide Bay Water	107. WIN Support Services	
18.	APA	48. Aust Care Australia	<b>78.</b> Adidas	108. Bond University	
19.	ABB Industries	49. Mercy Hospital	79. Brimbank City Council*	109. City of Belmont	
20.	Vic Roads	50. Astra Pharmaceuticals	80. BTR Nylex	110. RWAV*	
21.	Chiquita Mushrooma	51. Western Mining	81. Juniper Development Group	111. CPSCU Credit Union	
22.	Bankstown Health Service	<b>52.</b> Macquarie Health Service	82. Ticketmaster	112. Freehills	
23.	AFL	53. Greening Australia*	83. Maxxium Australia	113. Catholic Insurance	
24.	Utilux	<b>54.</b> PowerWater NT	84. Houstons Farm	114. KBR Corporation*	
25.	Aust Pacific Paper	<b>55.</b> Butterworths	85. Melbourne & Olympic Park*	115. Victorian Auditor General	
26.	Data Connection	56. Cablex Australia*	86. Bridgestone NZ	116. Kalari Transport*	
27.	TPG Consulting*	57. Melbourne Sports & Aquatic Centre	87. Melbourne Business School	117. AHIMA USA	
28.	Shire of Yarra Ranges	58. Marchetti Smallgoods	88. St Kilda Football Club*	118. Football Federation Australia*	
29.	City West Water*	59. Moet Chandon*	89. Coogee Bay Hotel	119. Headstrong	
30.	Essendon Football Club*	60. Totalcare Health Industries*	90. Fowles Auction Group	120. Reflections Group*	





## Stephen Moore Founder & Managing Director

Stephen Moore spent the first twenty years of his professional career occupying a diverse range of Employee Relations roles within leading organisations including Trans Australia Airlines, Ford Motor Company & Coles-Myer.

In late 1995 Stephen formed Optimum Performance HR Consultants, where he spent the next two decades primarily designing & delivering people metrics, analytics & planning solutions to a diverse client base located throughout Australia, New Zealand, Asia & South Africa.

After a short stint in the HR software development industry, in early 2018, Stephen established a new consulting practice (Moore HR), which provides a diverse range of Strategic HR Management programs, services and DIY tools that will (firstly) optimise workforce management and performance in your organisation, and (secondly) elevate the Human Resources Department's role, contribution and recognition throughout the business.

Along this long and often unpredictable journey, Stephen has collaborated with the Australian Human Resources Institute, the Human Resources Institute of New Zealand, the Hong Kong Human Resources Institute, the Public Service Commission WA and Latrobe/Deakin University Graduate Schools of Management in designing & delivering a diverse range of public training workshops, conferences, tertiary level distance learning courses and MBA master-classes to more than 3,000 HR professionals located across nine separate countries.

Stephen also developed and managed his own USA HR Best - Practice Study Tour, where for more than a decade, senior Australian Human Resources executives were provided with the opportunity to benchmark pre-eminent organisations, who amongst others included Harley - Davidson, FedEx, NASA, Cisco Systems, Hewlett-Packard and Marriott Hotels.

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## What Some of Our Clients Say About Us

"Stephen is an entertaining, straight to the point and experienced professional with great public speaking skills and the ability to apply theory into practical examples in many different structures and organisations. We are happy we were able to join the course and will definitely stay in touch with Stephen for more learning moments and insights."

**Vice President of Strategic Analysis Venetian Macau Limited** 

"Stephen is a guru who coached the SEEK team to make significant improvements in our approach to HR metrics. Stephen is a pleasure to work with and a great trainer. He can adapt to any level of experience and gives amazing insights no matter where the conversation goes" **Group HR Director**, **SEEK Limited** 

"Stephen's in-depth knowledge and experience with HR metrics is integral to any organisation trying to establish an HR Metrics Dashboard within their business. Stephen is a strategic thinker who can influence HR personnel to deliver the right metrics for their operations which has assisted Caltex to transform the way HR metrics are reported throughout our organisation."

HRSC Manager, Caltex Australia Petroleum

"The Workforce Planning model developed and presented by Stephen has been very useful in allowing us to plan for changes in our workforce and the wider recruitment market and develop strategies to adapt to any global or local changes. Highly recommended process and facilitator."

**Manager Organisation Development, City of Whitehorse** 

"Stephen presents an excellent model for human resource management metrics. This model is practical, easy to implement, and he explains how to use the metrics exceptionally well. Very engaging facilitator and consultant."

**General Manager Learning & Development AHRI** 

"The success of our HR Metrics training program was beyond expectations, exciting all who attended, with an agreement reached on key areas that will enable us to move forward and establish consistent, value-adding HR Metrics that will support decision making for our managers in managing their business."

Group Human Resources Manager, Hills Holdings

"Stephen helped to develop our understanding of strategic workforce planning, providing a relevant framework, advice and practical forecasting tools. It enabled us to develop a strategic workforce plan that led to our Board approving what became an award-winning workforce development program for a critical workforce segment of our business."

Manager People Strategy and Change, City West Water

"Stephen is an astute, strategic, business thinker with a wealth of knowledge around HR and Metrics. He is able to deal with diverse clients, builds excellent relationships and is one of the few people who get the importance of people strategies & metrics to the business."

People and Culture Partner, Deloitte Australia