



Professional and Organisational Development Services

CREATING MONTHLY REPORT PROCEDURE

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1 Introduction / Background

Each month, Professional and Organisational Development Services (PODS) is required to contribute statistical and qualitative content to the Personnel Division Monthly Report. This report allows PODS to showcase its achievements during the month and to show in quantitative terms the level of training activity undertaken.

Monthly report data may be used to develop indicators of training effectiveness, and is a valuable resource to be used when compiling the annual statistics.

2 Scope / Purpose

This procedure covers the qualitative and statistical monthly report as well as the individual objectives (against business plan) report provided to the Director, Personnel Services each month.

3 Definitions

RECORDED ON ALESCO

PODS Courses – any courses organised by PODS that staff nominate for through Web Kiosk or course nomination form– recorded by PD Administrator

Finance – all courses (including one-to-one training) conducted by the Finance Training Officer

OH&S – all courses organised for or by OH&S – Note student attendances are separated from staff attendances and recorded on the monthly report but are not entered on Alesco

PODS Consultancies – any courses organised by PODS for specific units or faculties are involving training or facilitation including team building sessions, skills sessions (time management), and Team Management profile. Also one-to-one facilitation of training type sessions e.g. Kronos for Supervisors, debrief of team Management Profile – recorded by PD Administrator based on information provided by Consultants

NOT RECORDED ON ALESCO – note this information is recorded for the team's use rather than being fed into the Division's monthly report.

- PODS consultancies – for example facilitated sessions such as planning days – recorded by Consultants
- Coaching/Mentoring – one to one sessions including coaching, mentoring or career advice e.g. job application and interview skills – recorded by Consultants

4 Flowchart (Optional)

N/A

5 Instructions

Person	Step	Action
PODS Manager	1	Receive a request from the Director, Personnel Services for contributions for the upcoming Monthly Report. The due date for contributions is generally the end of week 1 of the following month.
	2	Email the PODS Team for details of activities undertaken during the previous month with date submission required.

Special Note		<p>Administrative Staff (PDA) will complete the statistical report for training activity undertaken during the previous month.</p> <p>All Staff with qualitative reporting data for the month will enter the information.</p>
PODS staff	3	<p>Open the folder G:\Reports\Monthly reports. Open the folder for the current year, then open the word document for the appropriate month. (If there is not a document already saved for the month required, open the document from the previous month and 'Save As' the new month.)</p> <p>The report is broken down into three sections</p> <ul style="list-style-type: none"> • Client • People • Business Operating Process
	4	Record qualitative highlights for the month i.e. achievements, work undertaken etc
	5	Save the file in the current year and under the name of the appropriate month.
NOTE: The remainder of this procedure relates to preparing the statistical report.		
PD Administrator	6	Open the course database to identify all courses conducted during the month.
	7	Check with PODS Team for details of any consultancies conducted during the month.
	8	Email Finance Training Officer for details of any Finance workshops or one-to-one sessions conducted during the month.
	9	<p>Open the folder G:\Reports\Monthly reports. Open the folder for the current year, then open the excel document for the appropriate month. (If there is not a document already saved for the month required, open the document from the previous month and 'Save As' the new month.)</p> <p>The spreadsheet is broken down into five sections</p> <ul style="list-style-type: none"> - PODS courses - PODS consultancies - Finance courses - EED courses - OHS courses
	10	<p>Enter the name of each course under the appropriate heading in Column A, e.g. <i>PODS Courses, OH&S Courses</i>.</p> <p><i>If a course runs across more than one month, show only the sessions conducted during the current month, and ensure remaining sessions are shown on the monthly report for the following month.</i></p> <p>For Finance Courses group course statistics together for courses run in the same month with the same course name.</p>
	11	Enter the number of people who attended the course into the <i>Participants</i> column (Column B). This information is available from the course Sign-on Sheet or from CONCEPT – FC228 'Nomination Summary'.

	12	Enter the total number of hours of the course into the <i>Face-to-Face Delivery Hours</i> column (Column C).	
	13	Enter the total participant hours in the <i>Face-to-Face Participant Hours</i> column (Column D). Total participant hours can be calculated by multiplying the figure in Column B by the figure in Column C – i.e. TOTAL PARTICIPANTS X COURSE HOURS.	
	14	If ...	Then ...
		Course Evaluations were completed by participants ...	Enter the figure from the “Satisfaction Index” cell in the Evaluation Report (Cell J1) into the <i>Evaluation Score</i> column (Column E). Evaluation reports can be found on G Drive or Imagereal.

PD Administrator		If ...	Then ...
		Course evaluations were not completed by participants ...	Enter “not applicable” into the <i>Evaluation Score</i> column (Column E).
	15	Enter the number of Personnel Services Division participants into Column F. This information can be found on the course Sign-on Sheet or on CONCEPT.	
	16	Note in column G any relevant information e.g. “This session not recorded on Concept” or “Evaluated end of session 2”	
	17	Check all totals have calculated correctly. Totals in Column E – evaluation scores – need to be added manually. Tally the number of courses scoring 5.5 or better and show as a figure out of the total number of courses <i>for which evaluations were completed</i> .	
	18	Save the file in the current location and under the name of the appropriate month.	
	19	Send by email to the Manager, PODS to confirm the report is completed and saved in the appropriate folder on the G drive	
	20	Forward the OHS Courses section to Manager OH&S Unit and cc OH&S Officer	
PODS Manager	21	Check reports to ensure all material is included	
	22	Send qualitative and stats report to the Assistant to the Director Note: Personnel Monthly reports are kept on the Managers Drive (Y) in the Managers report folder	
	The following actions are completed on the Individual Objectives report		
	21	Open the folder Y:\Business Plan and open the business plan objectives folder for the relevant month.	
	22	Scroll down the <i>Key responsibility</i> column to name of Manager. And identify any areas of Managers responsibility	
	23	Enter an update on Strategy (actions undertaken in relation to that objective) in <i>Comments on progress for the current month</i> column.	
	24	Save the file in the current location.	
	25	Send an email to the Assistant to the Director to inform them that you have updated the spreadsheet.	

6 Roles & Responsibilities

As above

7 Related Documents and References

Monthly report reporting documents– g drive/administration/monthly reports/year

8 Version Control Table

Version Control	Date Released	Approved By	Amendment
1.0	070411	Meredith Morgan – PODS Manager	Updated procedure into new template
2.0	081405	Lorraine Denny – Acting Manager PODS	Included reporting against individual objectives