

Performance Management - PMP Phases

- ▶ Planning for Performance
- ▶ Managing and Coaching Performance
- ▶ The Performance Review Process
- ▶ Conducting the Performance Evaluation Meeting



Performance Management Complaints

- ▶ Work intensive
- ▶ Reliability, Consistency - misuse of rating scales, rater biases, cut and paste
- ▶ Vague, general feedback
- ▶ Annual evaluation is not meaningful or timely
- ▶ More frequent and timely evaluation leads to “constant” evaluation
- ▶ If mishandled, creates serious damage to morale or even legal action
- ▶ Trade offs: backwards looking for reward verses forward looking for development



Value of Performance Management:

Why is this important?

- ▶ A supervisor's attitude about the value of a position will impact the employee's attitude, and ultimately the employee's performance.
- ▶ People take pride in work they believe is important and making a real contribution.
- ▶ Outcomes of employee performance will result in the furtherance of the mission and goals.
- ▶ Establishes historical record.
- ▶ Documentation for legal proceedings.

**A person
who feels
appreciated
will always
do more
than what is
expected.**

Phase I: Planning for Performance

Performance Evaluation Criteria

Are the criteria job related? How do you know?

Are criteria quantifiable, expressed in objective, measurable terms?
If not, are criteria expressed in terms of desired outcome?

- ▶ Employee input
- ▶ Essential duties of job descriptions
- ▶ Professional association standards



Phase II: Managing and Coaching Performance

Best Practices - Ongoing Evaluation/Coaching

- ▶ Ongoing Conversations/Counseling/Coaching
- ▶ Documentation is timely
- ▶ Consistency is a must
- ▶ Counseling is immediate
- ▶ Prepare all year for the annual process



Phase II: Managing and Coaching Performance

Ongoing Communication and Documentation

- ▶ Agreed upon expectations, well articulated goals, criteria, metrics, and outcomes
- ▶ SMART goals (specific, measureable, attainable, realistic, time-based)
- ▶ Documents observable behaviors and progress towards those goals
- ▶ Feedback for growth and development
- ▶ Support for decisions related to employment decisions
- ▶ Establishes historical record
- ▶ Documentation for legal proceedings
- ▶ Consistent, timely communication throughout the evaluation period - no surprises in an annual evaluation

Phase III: The Performance Review Process

Strong Documentation for the Written Performance Evaluation

- ✓ Verifiable, specific, measurable, behavioral observations
- ✓ Trends in performance with specific examples in support
- ✓ Outcomes, results, impact of performance
- ✓ Comments justify and are consistent with numerical ratings
- ✓ Differentiates between personality/traits and behavior/results which are observable and measurable
- ✓ Balanced feedback with the good, bad and “ugly”
- ✓ Employer *and* employee documentation for balance of perceptions, accuracy, focus on job

Avoid

- ▶ Emotive language, labels, opinions and generalities.
- ▶ Words that sound like “proxies” for bias or retaliation.
- ▶ Absolutes that are not credible.
- ▶ Uncertain, vague language
- ▶ Minor one-time occurrences and especially those addressed by the employee.

Phase III: The Performance Review Process

Common Bias Problems

Idiosyncratic rater effect: Tendency to rate another person's skills based on rater's own strengths and weaknesses.

Central tendency error: On a numbered scale, tendency to use the middle value

Recency bias: Tendency to focus on more recent events - especially for annual evaluation.

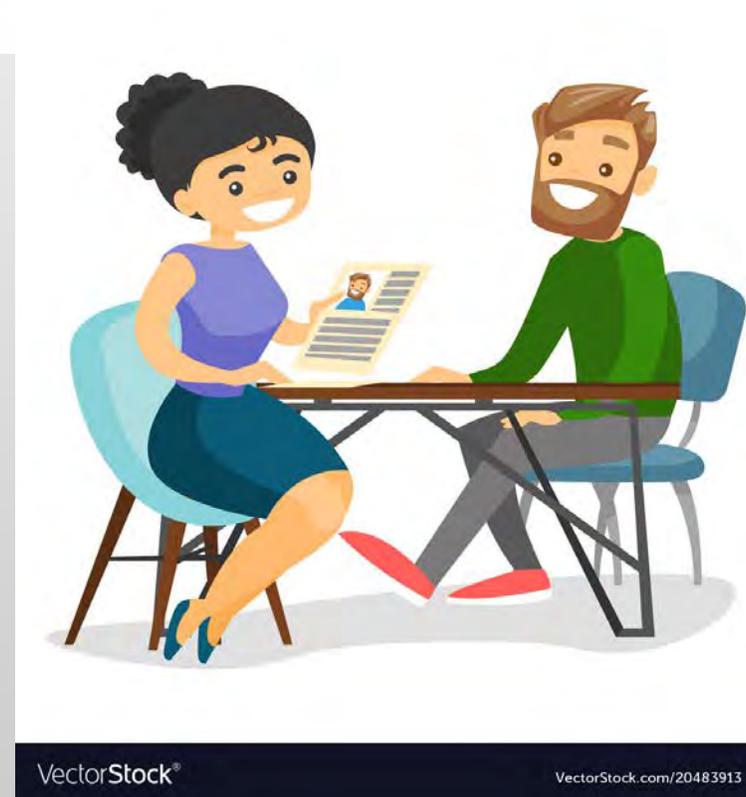
Confirmation bias: Tendency to notice and remember information that validates opinion.

Gender bias: Stereotypes whether gender, age, race or other have serious implications

Halo and horn effects: View performance in one dimension based on performance in another; or allowing a single trait - good or bad - to overshadow others and presume additional traits/behaviors.

The PMP Meeting

- ▶ Set a constructive tone
- ▶ Structure the meeting
- ▶ Listen
- ▶ Ask questions
- ▶ Focus forward
- ▶ Send forms to Human Resources by April 17, 2020



Summary Checklist

- ✓ Commit to performing fair and effective performance appraisals
- ✓ Involve your employees in discussing the job factors that they will be evaluated on
- ✓ Clarify the performance expectations
- ✓ Involve employees in setting goals, determining performance standards, and developing ways of measuring results
- ✓ Compare work results frequently against agreed-upon goals (Performance Improvement Plan)
- ✓ Wait until you have enough information to do a fair and thorough job before you conduct evaluations
- ✓ Work with your team to identify ways of improving overall work performance
- ✓ Keep written records of actions and impressions
- ✓ Provide coaching and feedback often - a poor performance evaluation should *not* be a surprise
- ✓ View performance evaluations as a developmental process