



EIT STAFF PERFORMANCE REVIEW GUIDE*

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*Adapted from Flinders University: General Staff Performance Review & Development Framework Users' Guide

INTRODUCTION

The EIT Staff Performance Review Guide has been developed to assist supervisors, managers and staff to prepare for and participate effectively in a Staff Performance Review. It provides practical advice on the various aspects of setting performance and development expectations, and on reviewing performance on an ongoing basis and as part of formal reviews.

By following the examples and underpinning principles you can be confident that you will be on the right track as you participate in a Staff Performance Review either as a supervisor or staff member. Most of the information is applicable to supervisor and staff member alike, though in some areas the pitch is towards the supervisor in particular.

POINTS TO CONSIDER FOR STAFF PERFORMANCE REVIEWS

Organisational Purpose

Effective Staff Performance Review is about supervisors and staff working together to plan, review and recognise good performance that enables the EIT's goals to be progressed – through achievement at the individual, team, division or department and cost centre levels.

The principles underpinning Staff Performance Review at the EIT are:

- Clear understanding of work priorities aligned with the EIT strategic directions
- Shared understanding of roles, accountabilities, workloads and performance expectations
- Shared commitment to ongoing performance development and development of knowledge and skills
- Ongoing feedback and recognition
- Openness, trust and respect

All Staff

Everyone is responsible for understanding the intent of Staff Performance Review and making the time and effort to engage in the process as part of day to day workplace management.

Staff Performance Review will help to answer questions such as the following:

- What am I expected to achieve in my role and how will that be measured?
- How am I doing?
- Why is my role important to the EIT and my work team?
- What does my supervisor value about me and my work?
- What do I need to work on?
- Where can I improve?
- How can my supervisor best work with me and help me achieve my goals?

It is often hard to set measurable goals and it may take a few attempts to develop something that is clear and satisfactory. However, Staff Performance Review is an ongoing process that can be continually improved so don't get 'stuck' because you think the goals are not perfect. The important point is to make a start - experience will allow you to refine goals.

There will be times when supervisors and staff have different ideas and views on work goals, priorities, measures and development strategies. That's OK! Approach this in a problem solving way, seeking to try and understand your different perspectives and exploring the different ideas before coming to agreement on the way forward.

Supervisors

Understand that some staff may be apprehensive about performance review and development. Try to focus on the positive points and how setting measurable goals can, for all of us, provide a sense of purpose and clarity about roles, what our work is designed to achieve and the significant impact our work has on the success of the workplace.

The form is not the main focus; it is a point of reference and tool to assist staff and supervisor to review progress. Rather, the overall focus of Staff Performance Review is relationships between people as these enable effective ongoing communication and feedback about performance. Staff Performance Review works best in a context of trust and respect.

Remember that you have the positional power in this relationship, so make sure you use it appropriately! Act as a coach in these situations as far as possible

A useful exercise for you to do in considering Staff Performance Review implementation and how you may embed it into your ongoing workplace management is to reflect on the following questions in terms of how you currently operate and work with staff.

- Planning – How do I make the links to the EIT's directions? How do I communicate the work area's future directions and priorities? How do I clarify expected work goals?
- Developing – How do I currently determine development needs? How do I support learning and development in the workplace?
- Reviewing – In what ways do I currently support and monitor achievement of work and learning goals/development needs?
- Recognising/Rewarding – In what ways do I recognise achievement of individual staff and the team? How do we celebrate our successes?
- Reflect on what is currently working well from your point of view? What's not and needs to change? How might you go about making changes?

FORMAL AND INFORMAL REVIEW

Reviewing performance is best approached as a shared process, and an open exercise in sharing information and, where necessary, problem solving.

INFORMAL REVIEWS

Performance review and development plans need to be reviewed regularly to ensure that they remain on track. Reviewing performance on an ongoing basis can be done informally, perhaps as part of regular 'work in progress' meetings between supervisors and staff. This has a number of benefits:

- it recognises that circumstances change and that it may be necessary to adjust goals accordingly.
- it provides encouragement and support to the staff member, thereby maximising their chances of achieving a good result.
- it allows the supervisor to feel confident that overall work area plans can be achieved.

How frequently informal reviews occur will vary with the nature and complexity of the role, the rate of change and the particular needs of the work area.

FORMAL REVIEW

An annual performance review on its own is of no use as, by the time performance is reviewed, objectives either will have been achieved or not and, if the latter, nothing can be done to get performance 'back on track' before the end of the current performance review cycle. Hence the importance of informal reviews, as discussed above.

At least once a year, there must be a formal and comprehensive face-to-face review. The purpose of the annual formal review meeting is to look at the achievement of all required outcomes, in order to begin a new Staff Performance Review cycle and to develop performance objectives for the next 12 months. As part of reviewing performance, it is important for staff to:

- freely discuss their work and its progress, including any difficulties;
- seek to clarify any expectations which are not clear;
- ask for help, training or resources where needed;
- accept and discuss any feedback in a non defensive way;
- identify issues which may impact on performance in future; and
- provide honest and open feedback to their supervisor.

Equally, it is important for the supervisor to:

- be well informed of the individual's progress through observation and by obtaining feedback;
- listen to the staff member's comments and openly discuss them;
- ask questions to clarify performance levels and achievement of objectives;
- consider development opportunities
- provide honest and constructive feedback
- be open to both positive and negative feedback from the staff member; and
- be prepared to alter plans or individual objectives if circumstances require.

Both parties need to review the development plan and:

- identify if planned activities have occurred
- reflect if development to date has been beneficial
- debrief the changes you have observed/experienced.

PREPARING TO ESTABLISH STAFF PERFORMANCE REVIEW PLANS

The Staff Performance Review Plan form provides a structure for the preparation of an individuals' performance review and development plans. The approach outlined below steps out the process involved in personalising the template to include relevant key responsibilities / outcomes, performance objectives, performance indicators and development plan.

A suggested approach to creating an individual Staff Performance Review is to get the staff member reflecting prior to meeting with his/her supervisor to establish their plan, draft documents that are then discussed together. Alternatively the supervisor reflects on the roles of staff within his/her area of responsibility so that, when the staff member and supervisor meet, both come prepared with their thinking.

Examine main tasks performed

List all the tasks that you perform in your role on a regular basis, no matter how large or small. Don't worry about grouping them together in similar categories at this point. Taking note of tasks you perform over a 2 week period may help you with this step.

Establish the key responsibilities/ outcomes for the position

Now group the listed tasks under broad statements that address what you need to deliver or achieve in your position. Each statement should represent a broad area of responsibility in your role. These become your **key responsibilities / outcomes**, the number of which will be dependent on your role.

Get relevant performance objectives for the review year ahead

Under each **key responsibility/ outcome**, consider what activities you may need to undertake to meet the outcome. Make a list of these specific activities and actions against the respective key responsibilities/outcomes. These become your **performance objectives** for the 12-month performance review period.

Determine appropriate performance indicators

Examine each key responsibility / outcome and its objectives and ask yourself “*How do I, or my supervisor, know when the objective is accomplished to a satisfactory level?*” or “*How can I measure the quality and completion of the task?*”

You may have a number of measures under each outcome for your various objectives and these may be quantitative and qualitative. These measures are the **performance indicators** for your performance.

The development plan for the review year ahead

Once you have created your performance plan you should then concentrate on your **development plan**. You could start by asking yourself “What training or experience do I need to meet my performance objectives?” and “What training, experience or development opportunities are available to me to meet the future needs of the institute and my career?” In addition your role may require you to undertake specific training (eg if you have recently become a supervisor, where you have particular OHS responsibilities, etc).

Review / amend as needed

Use and review your performance and development plan. Your plan should be a living document that changes if the need arises. If your position or role changes discuss it with your supervisor and make the agreed changes to the Staff Performance Review plan.

The plan is normally agreed between you and your supervisor during a discussion that also includes workload and your development plan. Both you and your supervisor should retain a copy of your plan. The supervisor retains the original, the staff member a copy.

As the EIT requires that a Performance Review and Development plan be in place, the supervisor has the option of determining the content of the plan where agreement is not reached within a reasonable time period leading up to the annual review date.

DEMYSTIFYING TERMINOLOGY

Understanding the terminology and aspects of Staff Performance Review will assist everyone to get the most out of Staff Performance Review planning and discussions.

“Outcome” / “Deliverable”

An outcome is what someone will deliver in his or her position. Outcomes are the results a person will achieve and are often listed under the section called Key Responsibilities and Outcomes .*For Example – “Provide quality advice relevant to your customer” is an outcome that could be termed a Key Responsibility and Outcome in a position description.*

“Performance Objective” / “Objective” / “Goal”

A performance objective is a specific task that relates directly to each outcome, that will be completed within the performance review period (normally 12 months), to a particular standard. Supervisors and staff will agree timelines for completion of each objective. If priorities change and expectations shift, staff and supervisors review the plan and create new and reasonable timelines for achieving the objective. *For example – For the outcome listed above, a specific performance objective may be “to conduct a customer service survey to ensure correct advice is given”.*

Note: for consistency and clarity, we use the term “performance objective” throughout the Guide

“Performance Indicator” / “measure” / “Key Performance Indicator (KPI)”

A performance indicator is an agreed standard against which performance is measured. It is how outcomes and objectives are measured. Measurements may be quantitative or qualitative. Many objectives may not have quantitative data to measure the performance and achievement. Qualitative measurements are as important in gauging performance and achievements as quantitative, but are not as easily identifiable.

Clear and open communication between staff and supervisors should assist with identifying qualitative measures that are appropriate to a person’s position. *For example - for an outcome of “Provide quality advice relevant to your customer”, a performance indicator could be “positive feedback from clients”. For an objective of, “conduct a customer service survey to ensure correct advice is given”, a KPI could be “development and implementation of the survey by XXX (date)”, plus “collation and presentation of results to the team by XXX (date)”.*

Further Examples

1. Most staff will be working as part of a team so the following is a way of capturing this.

Key Responsibility/Outcome: Contribute to teamwork

Performance Objective: - To attend and actively participate in team meetings
 - To contribute ideas in team meetings that support achievement of team outcomes/objectives

Performance Indicator: - Number of meetings attended
 - Active participation

2. Implementing a specific activity / project:

Key Responsibility/Outcome: Manage projects within given timeframe and budget.
For the coming 12 month period, a project officer may have one specific project to develop and implement, for example, Performance Management.

Performance Objective: - To develop a plan for the performance management project
 - To set up and convene a reference group of stakeholders
 - To develop procedures and supporting documentation

- To market project progress and outcomes across the EIT
- To monitor budget expenditure on a monthly basis

Performance Indicator: - Project completed within budget by end of 2012
 - Policy and relevant documentation are available on the EIT website by November 2012
 - Information sessions held in each Faculty/Business Work Group between October and December 2012.

3.

Key Responsibility/Outcome: To develop and facilitate implementation of XXXX Policy for the coming 12 month period, a policy officer may have one specific policy to develop.

Performance Objective: - To research XXX policy in 3 other Australian higher education institutions
 - To draft XXXX policy
 - To seek feedback on draft policy from relevant stakeholders
 - To finalise policy and promote across the EIT

Performance Indicator: Policy developed and approved by July 2012.

4. For supervisors, team supervision will be a core part of their responsibilities.

Key Responsibility/Outcome: To supervise the XXXX team.

Performance Objective: - To develop an annual team plan
 - To implement individual Staff Performance Review plans with each team member reporting directly to the team leader position.
 - To identify common development needs that could form the basis of a team development day.
 - To review regularly individual Staff Performance Review plans as part of one on one catch up meetings with staff reporting to the team leader position.

Performance Indicator: - Team plan in place by December 2011.
 - Individual Staff Performance Review plans in place by April 2011.

TIPS FOR SETTING PERFORMANCE OBJECTIVES

- To be useful, performance objectives must relate to the work area's direction and objectives. The staff member's personal goals are to be considered if the work area's objectives are going to have meaning to the staff member.
- Performance objectives must be followed up and reviewed.
- Supervisors need to consider the skill and maturity levels of staff in the development of performance objectives. New or inexperienced staff will need more direction and assistance than more experienced staff.

- It is best to set performance objectives in the main areas of performance rather than every aspect of the job. Otherwise it can become overwhelming!
- Performance objectives are to be documented at the beginning of the performance period.
- Be prepared to revise the performance objectives as things change within the EIT/work area.
- Write the performance objectives in clear language and specify how they are to be achieved.
- The performance objectives need to be reasonable and appropriate for the position.

Often it can be hard to set measurable performance objectives. The important part is to get the ball rolling – the first year you develop performance plans they may be good, but the second year they are likely to be even better with experience and continuous improvement.

Don't be blocked by the "perfect" syndrome. Often it can be hard to start putting performance objectives down on paper because they may be considered "wrong" or "not perfect". Experience will refine these. The important thing is to try!

Make sure performance objectives are SMART.

THE SMART PRINCIPLE

A useful tool to assist in writing effective performance objectives. A SMART performance objective is

Specific

Performance objectives focus on the results to be achieved. Setting a specific performance objective helps us to focus our efforts and clearly define what we are going to do; the three pivotal facets of this mechanism are WHAT, WHY and HOW.

WHAT will be done? (Try using verbs such as develop, plan, lead)

WHY is it important to do? (Where does the task fit in to the overall objective?)

HOW is it going to be done? (By taking what action, following what processes, involving which stakeholders/clients and how)

Measurable

Establish criteria for measuring progress towards the attainment of each performance objective set.

Attainable

Performance objectives that are set too far out of reach can be difficult to progress, even with the best intentions. Rather, they should be set so that with commitment (and confidence) they can be accomplished.

Realistic

Performance objectives need to be realistic in the context of resources and current skills levels. Be sure to set the bar high enough for a satisfying achievement, but not too high that the stage is set for failure!

Time-framed

Set a clear timeframe for the goal – that way there is a defined target to work towards.

Example:

- The first Friday of every month, solicit updates and new material from our department's managers for the intranet site.
- Publish this new material no later than the following Friday.
- Each time new material is published, review our department's intranet site for material that is out-of-date and delete or archive that material.

MEASUREMENT OF PERFORMANCE

When the time comes to measure performance in relation to previously set performance objectives, there is often difficulty in understanding what constitutes "achievement" – this is why it is helpful to use performance indicators when initially setting those performance objectives! Simply put, performance indicators are a highly specific level of measurement, and act as a gauge of whether or not set performance objectives have been achieved.

Performance indicators may be either:

- Quantitative – numerical data such as: percentages.
- Qualitative – distinctions based on descriptive quality.

Keeping that in mind, it is wise to balance the types of indicators being used – develop a mix that details quantity, quality, time and cost! Performance indicators are set to measure whether or not performance objectives are being achieved, not just if action has been taken!

Example 1: a measure of activity may be "number of staff who attended Records Management training in one month", whereas a meaningful performance indicator might be "percentage of staff who can confidently undertake Records Management".

Example 2: If a key responsibility is 'Service Delivery', performance indicators might include:

- Response time to enquiries e.g. 24 hour turnaround
- Materials prepared to a timeline and agreed quality
- Client feedback indicates satisfaction with service.

Characteristics of effective performance indicators include:

- Targets for achievement.
- Used for continuous improvement and accountability purposes.
- Simple to understand.
- Expressed as percentages, etc.
- Easily measured (using numbers where possible can accomplish this).
- Client focused.
- Aligned to the organisation and work area objectives.
- Highly detailed, so there is enough definition even in qualitative indicators.
- Significant events (for example: projects that have been completed).

COLLECTING DATA ON PERFORMANCE EFFECTIVENESS

We are all surrounded by feedback on our performance effectiveness, which is gleaned from a variety of sources and enables a more comprehensive approach to Staff Performance Review.

Sources of feedback should be agreed between the staff member and supervisor. This is an area where trust is important. The emphasis is not on 'checking up', rather on ensuring data is available to staff

Useful sources of feedback could include:

- *co-workers, team members and peers*: an invaluable source of information on how a colleague is contributing to the achievement of team outcomes, or to team harmony and morale;
- *other supervisors*: who are in a position to comment on how a staff member is contributing to work area plans and outcomes, or to the quality of management advice given, as well as on their commitment to customer service;
- *internal customers*: who are in the best position to comment on the effectiveness of the service being provided, its quality and timeliness, and the 'customer skills' of the staff member;
- *external clients (organisations with which a staff member works or liaises)*: may also be asked to comment on issues such as those above; and
- *students*: who may be asked to report on the level of service provided, the quality of service.

Data can be collected through the following ways:

- Reviewing the individual's performance against the agreed work goals.
- Asking the individual to complete a self-assessment against position capabilities.
- Undertaking discussions / surveys with clients, colleagues, direct reports, stakeholders who are in a position to have directly observed an individual's performance (360 degree surveys are a particular example of data collection to provide information on performance).

Where such information has been collected to facilitate improvement in the context of 'below satisfactory performance or conduct', it is essential that this information is then used in the following ways:

- Immediate – Providing feedback on performance as it occurs is important – feedback should not be held over to the annual review. In other words, there should be no surprises at the annual formal review discussion. Immediate feedback also ensures that action is taken promptly to improve performance. Feedback should be provided respectfully, which means that in most circumstances this would not occur in front of others.
- Objective – Your feedback should focus on facts, not hearsay.

STEPS TO CREATING AN INDIVIDUAL STAFF DEVELOPMENT PLAN

To get the most out of the development plan, supervisors and staff can use the following steps:

- **Step 1** – Reflect on individual strengths and areas for further growth and learning.
- **Step 2** – Prioritise areas of greatest need.
 - What is needed now to enhance current performance?
 - What is needed within the next 12 months to meet anticipated changes in a role?
 - What is needed to facilitate longer-term organisational and personal goals?
- **Step 3** – Ensure there are clear and specific descriptions of areas for learning.
- **Step 4** – Understand the individual's learning preferences and identify suitable activities. See the Professional Development Unit for ideas on activities but remember that on the job learning can be most useful to us as adults in the workplace!

- **Step 5** – Create the development action plan, including target dates. Ensure that responsibilities for undertaking the activities are clarified.
- **Step 6** – Have a conversation about career goals, or other longer-term directions, and identify opportunities for assisting achievement of these.

To optimise successful achievement of development goals and to ensure agreed actions do not become a 'wish list' that is not progressed, it is recommended actions are selected that:

- align as far as possible with ways in which the staff member likes to learn,
- align with learning interventions that target the required development most effectively, and
- are prioritised.

QUESTIONS TO ASK AS PART OF DEVELOPMENT PLANNING

The following questions can provide some focus and direction when creating an individual development plan:

- What capabilities* are required to meet the 12 monthly performance objectives? (Capabilities refer to the knowledge, skills and behaviours that a person possesses and demonstrates.)
- What are the new functions that this work area will need to perform in the short and long term?
- What capabilities will staff members need to develop in order to perform these functions?
- What are the individual's strengths and areas for development in various capabilities, including those not currently required, but that may be needed in future?
- How does the individual prefer to learn new knowledge and skills?

It is useful to identify these in the context of a staff member's current role i.e. what capabilities are necessary for a person to be able to perform effectively in their role? Thus, a person's strengths and development areas can be linked directly to the outcomes they need to achieve in their current role.

Capabilities are often described within the position description for a role – usually as part of the Selection Criteria – so use Position Descriptions as the starting point for clarifying capabilities.

IDENTIFYING THE BEST LEARNING APPROACHES

Development is about continuously learning and growing in a range of ways. A commitment to providing all staff with the opportunity for development is an important aspect of an effective organisation.

Where there is a need for development, the following approach can aid in the process of identifying learning approaches to meet needs:

- L - Limited.** Set a clear timeframe for the development, that way you have a defined target to work towards.
- E - Exact.** A development plan needs to focus on the results to be achieved. Setting a specific development goal and activity helps us to focus our efforts and clearly define what we are going to do, as well as why and how we will do it!
- A - Appropriate.** Be sure that your development plan is suitable to your individual learning style. There are many different styles of learning – some

- people learn best by experimenting and doing, while others by reflecting and thinking. Keep this in mind when developing the plan.
- R - Realistic.** The development plan needs to be realistic for a staff member's overall direction and current level of skill. The resources required and the range of opportunities available (refer below) are also important factors to consider. Just be sure to set the bar high enough for a satisfying achievement, but not too high that you set the stage for failure!
- N - Now.** Focus on the immediate priority.

Supervisors need to remember to encourage and equip staff members to make desirable changes to their workplace behaviour by providing opportunities to practise, apply and consolidate their learning. It is also important for supervisor to reinforce desirable behaviour with feedback and recognition.

Workshops and courses can be useful development strategies, but learning approaches do not have to be restricted to these avenues. Remember that sustained adult learning often occurs most effectively on the job through involvement in project work or specific committees and/or within a structured workplace arrangement such as coaching and mentoring relationships, job rotation, secondments or higher duty opportunities.

A wide array of development support and opportunities are provided for staff by the EIT. Other available opportunities include:

- Being part of committee and working groups
- Being mentored
- Networking and involvement in professional associations
- Reading books, journal articles, discussion papers
- CD roms/interactive videos or computer based training
- Project work
- Higher Duties opportunities
- Using team forums to analyse successes and mistakes

FACILITATING CAREER DEVELOPMENT

In today's world of work the term 'career' is seen as a continuous process of learning and development. Discussion with staff about their career interests forms an integral part of the development process. It is useful for supervisors to ask and staff members to reflect on the following:

- How would you like to see your career develop in the short term and long term?
- List a short term goal or two (within next 12 months) and a longer term (you decide the timeframe)
- What does these mean in terms of areas for development?
- What capabilities would you be best to focus on?
- What experiences do you need to have?
- What knowledge do you need to gain?

In today's working environment, having a career doesn't just mean changing jobs or climbing up the career ladder to increased responsibility. It can also mean:

- continuing to grow in the current role,
- shifting the focus of current work into a new area at the same level,
- developing new skills,
- expanding current skills, or
- shifting to a new career path.

For some staff, their focus may be on successfully blending life and work, taking a career break to have children or study, or on preparing for retirement.

It is important that supervisors understand the future aspirations of staff in their area of responsibility, so they can undertake appropriate workforce planning within the work area.

PREPARING FOR THE STAFF PERFORMANCE REVIEW DISCUSSION - CHECKLIST

To ensure that everyone gets the most out of a performance review and development discussion, it is important that each party reflects and prepares prior to the conversation. The following checklist may be a helpful guide.

1. Supervisor to arrange the review meeting

- Organise a mutually-convenient time, date and venue (comfortable, free of disruptions and facilitates open communication).
- Make sure both/all parties have time to prepare – at least one week’s notice is recommended.

2. Staff member

- Ensure individual Staff Performance Review plan documentation is prepared and provided to supervisor, within agreed time frame.
- Using the plan as a prompt, prepare for a discussion on performance, achievements, plans for the year ahead etc.

3. Supervisor

- Reflect on performance of the staff member over the review period, performance objectives for the next period, the feedback to be provided on performance and any recognition for specific achievements.
- Consider what kind of structured recognition and feedback the staff member most appreciates. Use praise generously and genuinely.

4. Staff member to reflect on the supervisor’s role

- Consider what feedback you may wish to provide regarding support from your supervisor (or others) in achieving your objectives.

5. Supervisor and staff member to establish the right environment

- Collect your thoughts before the discussion to make sure you focus on the conversation.
- Make sure you bring with you the appropriate documents.
- Be prepared to problem solve and collaborate to achieve agreement.
- Assist each other in managing the time appropriately, so all necessary parts of the discussion are covered.

6. Have the discussion

- Use the completed Staff Performance Review document as a prompt.
- Discuss record taking and keeping arrangements including confidentiality.
- Agree on:
 - Performance objectives and performance indicators/measures.
 - Learning and development needs and goals.
 - Confirm when the next formal Staff Performance Review discussion will take place and the approximate date.

7. Record the key points of the discussion

- Normally the supervisor's role to complete.
- May be done at the end of the review meeting; or the supervisor may complete after the meeting and forward to the staff member for comment / signature.

8. Evaluate the process

- Both reflect on and evaluate the discussion, and note what was successful and what you could improve in future – this could take place at the next informal catch up between the staff member and supervisor.

GETTING STAFF INVOLVED IN THE DISCUSSION

It is important to encourage staff members to talk during the discussion about their job and performance, after all – it is their work performance and development you are talking about! Applying the following communication techniques can encourage staff involvement:

- Ask open-ended questions that will encourage staff to respond to you.
- Make sure you listen to their responses – don't interrupt them or appear disinterested.
- Ask the individual: "What has been working well?" and "Are there any problems or concerns?"
- Seriously consider their thoughts, opinions and concerns. Do not dismiss them.
- Be open to new ideas.
- Be respectful.

Do not come across as "the boss". Consider the process as a partnership to assist the individual to achieve work and learning goals.

FOLLOWING THROUGH ON PLANS

To get the most out of the plans agreed during Staff Performance Review discussions, it is important that staff effectively follow them through until completion or re-development and that supervisors set up facilitating and monitoring structures.

Staff:

Once you have a Staff Performance Review plan that specifies timelines and responsibilities, do the following to ensure progression:

- Monitor your own performance and development using the Staff Performance Review plan.
- Keep in regular contact with your supervisor regarding the progress and effectiveness of your plan. Use your plan as part of regular informal catch-ups to keep your supervisor up to date on progress.
- Request feedback regarding your performance and development to be sure you are on track. Be open to receiving constructive feedback about your work performance and development
- Use the timeline in your plan, as a guide for progress and further action – be sure that it remains realistic, and revise it if necessary in discussion with your supervisor.
- Alert your supervisor early on to factors, which arise within the work system that may prevent or reduce achievement of your performance objectives or development goals.
- Recognise and celebrate completing objectives or milestones in your plan. Gather evidence of your achievements and performance ready for your formal review discussion.

- Keep track of your accomplishments – a “completed” list is an effective way to boost motivation and see where your effort is going! – and forward on to your supervisor emails with feedback from satisfied customers.
- Share your success stories with others. This may open the door to future development or career opportunities.
- Actively participate in planned training and development. Reflect on what you learned ready for your formal review discussion and apply your new knowledge or skills as soon as you can in the workplace!
- Be proactive and take opportunities that present themselves to extend your capabilities.

Supervisors:

Review progress using the staff member’s Staff Performance Review plan. Build into regular informal meetings with staff.

- Keep a record of significant issues e.g. feedback given, goals achieved, agreed adjustment of goals, circumstances that may have affected performance etc, so you have these to hand for reinforcing in review discussions – as memories may be imperfect.
- Provide immediate recognition of high performance by offering praise.
- Provide constructive feedback early on and in an appropriate way to keep performance on track.
- Provide resources for agreed development opportunities
- Provide new challenges and opportunities to apply and practise new learning or expand the boundaries of a staff member’s current capability.

BUILDING PRODUCTIVE RELATIONSHIPS

Key to successful Staff Performance Reviews is the quality of the relationship between supervisors and staff. Consequently, if you are a manager, your daily interactions with staff and your management skills in communication, giving and receiving feedback, relationship building, and coaching are core to successful Staff Performance Review. Where there is a good working relationship between managers and staff, Staff Performance Review, feedback and coaching on the job will flow much more effectively. It is for this reason that building a relationship based on collaboration, trust and mutual respect is so important. Thus, as a manager, reflect on how effectively you role model and practise the following actions and behaviours, every day:

- Be accessible (within reason) and create the time and space to notice what is happening around you in the work area
- Become a sounding board for ideas/problems and encourage staff to come up with solutions/make sound decisions.
- Get to know your staff as individuals. Seek to understand, ‘What makes them tick?’ ‘What do they find motivating?’ ‘How do they like to be recognised?’
- Be reliable – do what you say you will. Follow through!
- Be consistent in what you say and what you actually do. Actions speak louder than words!
- Allow your staff to ‘speak up’ without fear. Listen, acknowledge, and explore differing points of view.
- Communicate your vision, the direction for the work area and performance expectations in a way that is clear to each individual staff member.
- Encourage and participate in debrief sessions after significant events.

EFFECTIVE FEEDBACK PRINCIPLES AND TIPS

The purpose of feedback is to continually improve performance. It is recognised that feedback influences behaviour and motivates performance. Feedback is important, as past behaviour is the best indicator of future behaviour; unless something intervenes to alter our perspective, we will not change. This does not always mean that feedback is “good”, but it should be delivered in a way that builds self-esteem and learning. Thus, acknowledge the successful aspects of performance as well as focussing on what can be improved.

To be effective, feedback is:

<u>Regular</u>	Like performance review and development, giving and receiving feedback will have limited benefits if it is a once a year event – it needs to be frequent and ongoing!
<u>Immediate</u>	If feedback is given as soon as possible after an event, it will have greater impact. It will also allow you to be more specific, as the feedback details will be more readily available in your mind.
<u>Specific</u>	When telling someone specifically what they did, or did not do, be sure to describe and focus on the behaviour, action and subsequent impact. Do not generalise your feedback, and do not judge the person!
<u>Empathic</u>	Feedback should be given with consideration to the perspective of the receiver. Understand your own biases, as well as the outlook of the person!
<u>Planned</u>	Make sure you have gathered the necessary information to provide effective feedback, and ensure you deliver it at the right time, in the right place!

There are essentially two types of feedback.

- **Positive Feedback**

This applies where a person has performed well. It consists of praise but is more powerful if it is used to highlight why or how the job was done well, and how it linked to expected outcomes or behaviours. The more specific the feedback, the more the individual will learn about their behaviour. Use this to reinforce good performance.

Example: *‘Everyone at the meeting was most impressed at how well you organised things at such short notice. Thank you.’*

‘You really do have a talent for writing accurate and precise reports.’

- **Constructive Feedback**

This applies where a person has not performed / behaved in line with expectations and is used to highlight where and why performance was not up to the expectations and explore how it might be done better next time. When describing the person’s action, it is important to focus on specific observable facts. Use it as a positive way of improving future performance.

Example: *‘I liked the way you handled the planning of your project, and you engaged the project team very effectively, they were right on board and knew what they had to do when. That’s often tough to achieve. I think if you had engaged the research officer earlier that would have been helpful and saved us delays later on. I’m wondering how you think her engagement could have best been achieved? What would you do if you were in this situation again?’*

To make the most of a feedback session, be sure that you:

- Are focused and well prepared. De-clutter your mind of everything else!
- Have all the facts on hand.
- Are clear on your approach
- Consider the individual, their context, their feelings and opinions. Go into the session with an open mind.
- Control your own emotions – don't lose your cool. Talk when you are calm and objective.
- Choose a time when you are at your best and you think the other party will be most receptive. Check you both have time to give your full attention to this feedback session.
- Take leadership and ownership of the feedback you are about to give or receive. Use 'I think' openers, rather than 'You are' statements.

GIVING CONSTRUCTIVE FEEDBACK

Knowing how to communicate our feedback appropriately is a critical part of the performance and development process. Collecting the right information and knowing what effective feedback consists of is only half the battle – you still need to negotiate your way around delivering your constructive comments!

Supervisors

When providing feedback, remember to:

- Prepare yourself and your staff for the feedback session
- Describe the actual behaviour in question.
- Describe the impact of the behaviour.
- Describe what you would like to see happening instead.
- Set a goal and start to coach your staff into achieving that goal.

Some additional tips to help giving effective feedback are as follows:

- Provide feedback privately.
- Be specific about the behaviour or action that was appropriate/inappropriate and explain the impact.
- Be receptive about how the feedback is being received and recognise whether it would be useful to reconvene at a later time (eg to allow time for the feedback to be absorbed)
- Check the accuracy of the information you are using – do not simply rely on word of mouth!
- Focus on the future – determine strategies for improved performance and gain agreement on how to handle the situation if it was to occur again.
- Try to deal with one issue at a time – select the aspect of performance that is most critical to achieving the objectives.
- Develop a team that is open to and accepts constructive feedback!

Example:

'You haven't been attending team meetings this month, which are important for you being kept informed about work changes. It is an expectation of your role that you do attend and contribute. How do you suggest we can enable you to attend team meetings in future?'

'You have overspent your budget in this area. Tell me what this is about and how you plan to manage the overspend.'

RECEIVING FEEDBACK EFFECTIVELY

When most people think of feedback, they imagine that they are the person offering it to others. The reality, however, is that we will also receive feedback from our own supervisors, co-workers and other staff. It is for this reason that being able to receive feedback effectively is so important for us all!

When receiving positive feedback:

- Allow the person giving the feedback to talk; listen attentively while they do so.
- Ask for specific details; make sure you understand the behaviour about which you are receiving information.
- If the feedback relates to personal attributes, ask the person to describe the behaviour that was appropriate.

When receiving constructive feedback:

- Allow the person giving the feedback to talk; listen attentively while they do so.
- Ask for specific details; make sure you understand the behaviour about which you are receiving information.
- If the feedback relates to a personal attribute, ask the person to describe the behaviour that they would like you to change.
- If the feedback does not appear constructive, say so, and ask the person to provide some constructive comments that they think would help you to make some changes.
- Be open to the feedback, ask for specific examples and, if you need, respond after you have had time to reflect on the issues raised. Responding defensively will not establish an environment where the other person will feel comfortable giving you feedback and will hinder learning and behavioural change.
- Where appropriate, follow through on the advice and suggestions given to you.
- A good non defensive way of asking for further details or an example that indicates a willingness to listen and learn is to use language such as the following: 'Thank you for sharing your perspective with me. Can you help me to understand by giving me an example of that?'

OTHER TECHNIQUES FOR PROVIDING FEEDBACK EFFECTIVELY

1. THE DISC APPROACH

To help practise an assertive response, we can use the DISC approach:

D **Describe** the situation.

Example: "When you arrive 2 hours late for work ..."

I **Indicate** the impact.

Example: "I've noticed that you haven't been able to complete all your job requirements for the day."

Often, it can be beneficial to pause here and ask the staff member a question regarding their perspective. *For example: "Can you tell me why you are late, and suggest what you can do to make sure that you can get here on time in the future?"* Then, as the conversation progresses, you can propose a solution if one has not already been suggested that works for both parties.

S Propose a **solution**.

Example: "If there are days when you think you will be late, I would prefer that you planned your work schedule in advance, so that your work can still be completed on time."

C Describe the **consequences**.

Example: "If you don't, you will not be meeting your work objectives that we agreed on 3 months ago." Although a "consequence" may sound harsh, in reality it depends on how you present it – the words you use, the tone you take and the body language you display. People need to understand the results of their actions. Their ability to do so will depend on how you present this information to them. The dialogue above, for example, could be passive, aggressive or assertive depending on the intonation, non-verbal behaviour and timing.

2. REFRAMING

Reframing is about changing perceptions in a way that raises awareness. It is about enabling the other person to look at an issue or situation in a new way. This can be achieved by using language in such a way to 'reframe' a problem and therefore the person's perceptions, and to raise the person's awareness of the different perspectives.

By facilitating the other person to see things differently, we enable them to take responsibility for finding a solution to the problem and enable them to commit to a change in outlook and/or behaviour. It is vital to get to the key point – the "insight" – that will help the person see the issue in a different way. This is the essence of reframing. When reframing, the following strategies can be used:

- Use solution-focused language, that is – don't ask *why*. (Asking *why* tends to take people back into the past; the idea is to facilitate them into looking forward.) Try to use *what* and *how* more often!
- Look for the *positive(s)* in the staff member's statements and respond to that.
- Try to deal with resistance quickly to help move the person forward.
- Have empathy, but open up the conversation and focus on the positives.

Examples:

Using language that moves the person forward:

Staff member: "I just don't feel like I'm getting anywhere with this."

Manager: "Yes – it can feel like that sometimes, but what do you think would give you a sense of purpose back?"

Dealing with resistance:

Staff member: "We've tried that already and it didn't work."

Manager: "I'm pleased to hear you've had experience with this before. What would we need to do to make it work this time?"

Staff member: "...but I couldn't do all of that..."

Manager: "...so, which bits could you do?"

Empathising and opening up the conversation:

Staff member: "I really hate what I'm doing."

Manager: "I hear what you're saying. What parts of the job are you enjoying at the moment?"

ACTIVE LISTENING

Listening is a critical skill in the Staff Performance Review process. Active listening contains a number of elements that help you to carefully listen and communicate that you have heard or understood what the other person is saying. Obviously, these tips need to be considered in the context of an individual's cultural background. Good listening techniques consist of the following:

- Keep control over your nonverbal gestures – maintain appropriate eye contact, keep an open posture, nod to show understanding, think about your facial expression.
- In your own words, paraphrase what was said to show understanding.
- Ask for clarification.
- Allow the other person to finish what they have to say before you make your own comments.
- Ask probing questions such as: “What does that mean?” and “Can you give me more detail?”
- Acknowledge the speaker's feelings.

The following are techniques that should NOT be used:

- Interrupting.
- Not making eye contact.
- Letting your mind wander.
- Thinking about what you're going to say next.
- Not probing or asking questions.
- Displaying distracting gestures – tapping your foot, fidgeting, tapping your pen continuously.
- Completing the other person's sentences or assuming you know what they will say next.

FACILITATIVE QUESTIONING TECHNIQUES

Asking questions of a staff member can help them to be more specific and concrete about situations and issues. A good technique accompanied by perceptive questions allows you to understand the reasons for any problems or concerns they may have. There are 3 main styles of questioning:

- **Open**
An open question requires a complete answer, so it is difficult to answer “yes” or “no”. Open questions assist staff members to understand their issues and it shows you have interest in what they have to say. They also have the added benefit of providing you with concrete information. This reduces the likelihood of you making assumptions. Some examples are provided below:
“Can you give me an idea ...”
“Tell me about ...”
“How does it feel ...”
“Can you please describe ...”
“What would you do ...”
“How/what do you think ...”
“What would happen if ...”
Why is that important to you?
How will you achieve that?
What options can you see?
What is the best way to tackle that?

Open questions help to facilitate the conversation, particularly if it is getting “stuck”!

- **Closed**
Closed questions usually result in a short, one word answer. They also tend to limit conversation. Closed questions are useful if you want to confirm actual information, or to gather specific information. For example, you might say:
“What ...”
“Who ...”
“Is that right?”
“Do you like ...”
“Do you feel ...”
- **Probing**
Once key issues have been identified, you can then clarify matters by focussing on the areas that need exploration. Usually you would ask questions such as:
“When you say XYZ, what does that mean to you?”
“How would this be done?”
“What else should be considered?”

RECOGNISING PERFORMANCE

Good performance needs to be recognised and reinforced by appropriate rewards if it is to be continued or enhanced. The research suggests organisations need to pay fairly to keep staff, yet it also says that money alone won't retain them. People are often more interested in having:

- Challenging/satisfying work,
- Growth opportunities
- A good supervisor
- Friendly colleagues
- Flexibility.

To be effective, it is vital to recognise good performance according to individual needs and wants; so ask staff what kind of recognition they most appreciate. Everyone is different! For instance, some will enjoy formal public recognition; others would be embarrassed by this and would prefer a private informal 'thank you' note.

Check which forms of recognition you might appreciate and which you would not:

- An award, preferably given in front of my peers
- A plaque to hang on my wall
- A thank you note from my supervisor
- My supervisor implementing one of my ideas and saying it was my idea
- A note to my supervisor's manager about my excellent performance
- A chance to be on an exciting, leading-edge project
- Some flexibility in my schedule
- Words of praise in front of my colleagues
- A chance to be on one of the important steering committees in the EIT
- More freedom or autonomy
- Opportunity to work with people from other parts of the EIT or external to the organisation
- Access to career development opportunities
- Conference attendance

The simplest form of recognition is simply to recognise and express appreciation of the staff member's achievements. Sincere praise is a powerful, and at times under-rated, reinforcer of

good performance. It's also important to note that praise and other forms of recognition should occur throughout the Staff Performance Review cycle and not be retained until the end.

COACHING STAFF

Key to a supervisor's role and own performance effectiveness is the ability to elicit quality performance from staff who report to you. Perhaps the most significant strategy to enable you to do this is the coaching process. Coaching is about a supervisor helping staff work through job-related problems with the aim of learning new skills and know-how and continually improving their performance. It may involve challenging the staff member and their perspective and providing feedback to motivate the staff member to perform. The process of coaching is:

- based on collaboration,
- asking questions rather than giving advice,
- enabling staff to see the problem more clearly, perhaps questioning his/her own assumptions, and
- helping them find a solution.

It is not about providing staff with solutions, but rather facilitating them to find an appropriate solution and to take action. This approach enhances their ability to work independently, think critically, and find creative solutions to problems. As 'supervisor-coach', you work with the staff member to:

- understand the issue and current situation
- identify the ideal outcome/solution
- brainstorm options to move from the current situation to the ideal outcome
- facilitate them in deciding on a course of action and motivating them to take action.

Key coaching skills are:

- Developing productive relationships. We learn best from coaches we respect and like.
- Skilful questioning. It is important to be supportive, but challenge when you feel that it will push the staff member into further achievement with questions such as: "What else might you learn from that?", "Can you see a better way than that?"
- Recognition and positive reinforcement
- Giving constructive feedback

MINIMISING WORKPLACE CONFLICT

On an ongoing basis, supervisors can assist in minimising workplace conflict that can adversely affect team and individual performance. Consider the following:

- *Reduce role ambiguity*: Role ambiguity refers to a lack of clarity about a staff member's responsibilities, and how their roles and work relate to the roles and work of others. Clarity regarding individual and team roles can help prevent misunderstandings and frustrations that lead to disruptive workplace conflict.
- *Eliminate work overloads or underloads*: Work flows should be coordinated to ensure that staff are challenged without being overwhelmed. Staff who are not challenged can get bored and invest their energy in unproductive activities, while staff who are overwhelmed can get frustrated. Both conditions can cause disruptive conflict.
- *Improve access to information*: Poor communication is a major cause of conflict. When staff are hungry for information and that information is not provided, they will often create it. The resultant rumours are likely to lead to the creation or escalation of conflict.

- *Involve staff in organisational change and decisions:* People tend to change when they have participated in decisions leading to change. People tend to resist change to the extent they feel change is imposed upon them.
- *Seek to understand different work styles and perspectives of others:* Because people come into the workplace with different backgrounds and perspectives, it is important to effective conflict management for all staff to be aware of how each tends to react in certain situations.
- *Develop interpersonal skills related to conflict management:* Assertiveness, communication, and negotiation skills training may provide staff and supervisors with the techniques and confidence they need to resolve conflict quickly, effectively, and independently.
- *Develop skills for conflict management in groups:* Participating in group problem-solving exercises/group debriefing of major workplace issues may help increase group cohesion and reduce disruptive conflict.
- *Eliminate win-lose situations:* Whenever a staff member or supervisor approaches a conflict by defining success as getting something at the expense of another person, a disruptive workplace conflict is a likely result. A more effective approach than this competitive, adversarial, win-lose approach is a collaborative, mutually beneficial, win-win approach.
- *Use informal conflict resolution processes when possible:* Because miscommunication is at the root of many conflicts and people tend to become more defensive and adversarial in formal complaint processes, using informal approaches to conflict resolution can be very effective in preventing disruptive workplace conflicts.

CONFLICT RESOLUTION TIPS

Conflict is when two or more values, perspectives or opinions are contradictory in nature and haven't been aligned or agreed about yet. If managed and resolved effectively, conflict can be helpful; it raises and addresses significant issues, and allows staff to learn and benefit from their differences. On the other hand, if conflict is not managed effectively, it can obviously have many debilitating effects; it lowers morale, hampers productivity, and causes inappropriate behaviour. Therefore, an effective approach to diffusing conflict and making the most of it is a step towards successful relationships and work environments.

Of course, negative, disruptive conflict is unlikely to be totally eliminated! Therefore, when presented with a conflict situation, the following can be used to assist in finding resolution:

- Be willing to fix the problem.
- Attack the issue at hand, not the person.
- Keep calm in your approach.
- Broaden your outlook by seeing the other perspective as well as your own. Treat the other person with respect and ask that they hear your viewpoint too.
- Understand all needs and anxieties. Elicit clear statements about the person's concerns – it is important to find out what he/she really feels about the issue and to be clear on the point of conflict that needs to be resolved.
- Clarify / summarise the other perspective, to show you have listened and understand.
- Take your time – there is likely to be a deal of emotion involved, and the other person needs to feel that he/she has been heard.
- Work together, as it is a two-way process!
- Think up as many solutions as possible.
- Focus on the possible positive outcomes, not the negatives.
- Produce clear statements of any agreed actions – if you don't do this then you may run into problems later.
- If necessary, consider using a mediator/objective third party to regulate the discussion.

MANAGING PERFORMANCE OR CONDUCT ISSUES

Supervisors

Regular and meaningful Staff Performance Review discussions that make performance expectations clear and provide ongoing positive and constructive feedback to staff on their performance will in most cases prevent staff from experiencing difficulties in meeting performance expectations relevant to their position.

Should any staff member (either a supervisor or an employee) experience difficulties in meeting the agreed performance expectations for their position, Staff Performance Review discussions are an appropriate forum to address performance issues. When performance issues have arisen and been discussed throughout regular Staff Performance Review discussions, these issues may form part of the agenda for discussion at a structure counselling meeting.

- **Identifying the Performance Issue(s)**

In dealing with a staff member whose performance is not meeting expectations, it is vital as early as possible is to clearly and specifically identify what outcomes or behaviours are not being achieved.

Example:“A part of your role and one of the performance expectations we have agreed is that you attend and proactively participate in weekly team meetings as part of your contribution to Teamwork. I appreciate this may not always be possible due to annual leave commitments or if you are off sick. However, you haven’t been attending team meetings at all this month and I know you haven’t taken any planned or unplanned leave. Tell me what this is about and how you plan to ensure you attend team meetings in future.” The reasons for the performance shortfall should be explored in an open and positive manner with the staff member, who should have the opportunity to express their ideas and feelings about the situation. It is very important that the views of both the staff member and the supervisor are taken into account in such a discussion. No solution should be proposed until both parties understand clearly why the performance has been below the required level. Actions to improve the staff member’s performance should be discussed and ideally not merely imposed by the supervisor. Any action negotiated with the staff member is more likely to be carried out than actions imposed or demanded. The supervisor and staff member work together to establish the best plan of action. This plan clearly outlines the performance expectations, allocates responsibilities for actions to be taken (by either party) and provides clear timelines, including review dates. A record of the plan is kept by both the supervisor and the staff member. Once the plan is in place, it is essential that the negotiated timetable for review be maintained. The supervisor must provide clear, specific and timely feedback to the staff member and as far as possible, a coaching approach should be taken, with the staff member’s views being sought and considered.

- **Discussions on Performance Difficulties**

It is acknowledged that discussions with staff about their performance, particularly when expectations or outcomes are not being met, can be difficult and many people don’t like raising the issue. A number of readily learned skills can make much easier the task of dealing with performance issues where improvement is needed.

- ***Pay Attention***
Ensure you are giving your undivided attention to what the staff member is saying and don't indicate by your body language (e.g. downcast eyes, tapping) that you are not really listening or interested in what he or she has to say. Take note of the non-verbals e.g. person's tone, gestures, facial expression to get a real sense of what he or she may be saying.
- ***Responding***
Communicate back to the staff member that you have heard and understood what they have said. "I hear what you are saying and, if I understand you correctly, you are saying" If need be ask a question to clarify and make sure you understand – "When you say that, am I right in understanding that....?"
- ***Asking Questions***
Probe for more information if needed – "Can you give me an example of that?" Asking questions can help you and the staff member understand the reasons for the issues more clearly as well as indicate that you are interested in what the staff member has to say.
- ***Where performance does not improve***
Where performance is improving, but not to the required level, positive feedback, encouragement and assistance should be offered at all times. In such an event, timelines may be extended to give the staff member time to complete the improvement, which is in progress.

Once it is clearly identified that performance, despite all other steps being taken, is not improving to the required level, it is important that it be addressed quickly. Immediate action in such situations ensures that the performance problems do not become entrenched, providing a clear signal that the EIT expects a certain level of performance and that the level being delivered is not acceptable. In these cases, it is important to seek advice from a member of staff that deals with Human Resources.