

b.

## **Performance Management Guide for People Leaders**

### **Ongoing Performance Management**

Performance management is the monitoring of an employee's overall performance, including how they are progressing in learning the skills and behaviours necessary for their role and how they are doing in accomplishing the goals you have set for them. It is important to provide balanced feedback on an ongoing basis, which includes acknowledging accomplishments, improvement and effort, as well as the areas for ongoing improvement, such as developing a skill, staying on track with a goal, or managing their attendance. Find a place to keep notes to track these conversations and identify trends, so you can determine how best to support the individual.

Remember, that the purpose of a performance review form is simply to document expectations (in the form of goals) and provide a summary of an employee's performance at the end of the period, which should be a collection of all the things that have been discussed with them over the year.

Be sure to re-visit goals on a regular basis by including them in your ongoing meetings with each staff member. Update goals, where expectations change. Be sure to provide the employee with an updated copy when goals change so they are clear on their objectives.

### **Performance Review Meeting Preparation**

1. Send the employee a copy of their current (new) and previous performance review, with instructions to review and add comments before their upcoming performance review meeting.
2. Pull together materials for the performance review meeting:
  - a) Resume - to understand their background
  - b) Employment contracts - these give you a sense of what we have committed to employees
  - c) Position profile - be familiar with all of the job requirements that have been communicated to employees
  - d) Notes to file - these are generally disciplinary notes that we have issued, but can be recognition letters we have issued as well
  - e) Notes - sometimes there are small things you just want to remember. Take some time each week/month to make some notes about each person on your team. Doing this helps you identify which employees may require additional support and those that continue to perform well. It also provides clear information and examples for performance reviews.
  - f) Performance reviews - looking back helps you to recall what feedback you have given in the past and how the employee has developed
3. Once the employee has returned the performance review form with their comments, add your comments/remarks in each of the comments areas.
4. Review operational/business plans and identify goals that are related to each individual and put them in next period's performance review file.
5. Work with <CEO, Executive Director and/or HR> to identify any salary increases/incentive pay-out/bonus.

## **Conducting the Performance Review Meeting**

1. Go over yours and the employee's feedback on each section the performance review.
2. Ask the employee's feedback on any goals they see for themselves for the upcoming period.
3. Go over your thoughts for goals for the upcoming year.
4. Close off by summarizing all the goals you will move forward with.
5. Discuss any salary increases and the rational for the amount.
6. Commit to updating both performance review forms to fully reflect information from your discussion and sending them a copy, which you will review together on an ongoing basis.
7. You and the employee should sign the performance review for the period that has just passed. Please file the performance review in their employee file.