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# PERFORMANCE MANAGEMENT



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# INTRODUCTION

The purpose of this document is to provide strong, fundamental knowledge and tools to help you tailor a structured performance management program specifically to meet the needs of your organization. The key elements discussed here are aimed to offer a comprehensive framework that will allow you to fairly assess your team members' performance, motivate team members to continuously perform at their highest potential, and identify and address performance issues in a timely and effective manner.

# PERFORMANCE MANAGEMENT

Performance management is a useful tool that helps employees succeed, motivate them in their career development, and ultimately help achieve business goals for the organization.

An effective performance management program allows people managers to deliver fair assessments and actionable feedback to their direct reports. This can increase employee engagement, provide strong recognition and encouragement, and create tangible paths for employee growth that are rooted in accountability. It also ensures your team members are receiving the information they need to continue to grow and develop in their roles. When your team members know what they are doing well and where to improve, it becomes part of the culture and something employees continue to seek out.

## **Performance Management Framework**

There are several components to an effective performance management framework, including formal performance reviews, ongoing 1:1's, and performance improvement plans.

### **PERFORMANCE REVIEWS**

Probationary performance review – As a new hire approaches the end of their probation period, it is an opportune time to conduct the first performance review to ensure that all parties are on the same page around the expectations of the role, uncover and discuss any gaps in performance and formulate a plan to resolve any identified issues.

Semi-annual performance review – Every six months, conduct a comprehensive “half year in review” of the employee’s performance in their role. This is about highlighting where they have excelled but also openly discussing areas of improvement. This is also a good opportunity to reassess their goals and discuss how the organization can better support their continued growth. The results of the annual reviews also help inform any decision around compensation adjustments for the employee.

### **PERFORMANCE REVIEW COMPONENTS**

Wherever possible, we recommend 360-degree performance reviews that allow for multi-directional flow of feedback between the employee, their manager as well as their peers. At a minimum, however, a performance review should provide the opportunity for reflection on an employee’s performance from both the employee and their people manager.

## **SELF EVALUATION**

- Provides an opportunity to assess how a team member feels about their own performance and goals
- Opportunity to assess their culture-fit based on your organization's values
- Opportunity to find out why they enjoy working at your organization
- Opportunity to collect further feedback on their manager
- Opportunity to collect further feedback on their Team

## **MANAGER'S EVALUATION**

Overall, the manager's feedback should be a synthesis of all the data and feedback collected during the ongoing 1:1 sessions (i.e. there shouldn't be any surprises).

Synthesizing feedback that's been collected over time captures the progress an employee has made and any pattern or trend they are exhibiting, while avoiding the recency effect (only focusing on work done recently because it's what's fresh in the mind.)

Of course, the manager has the opportunity to (and absolutely should) add their own anecdotal information as well to provide context.

## **PEER EVALUATION**

For a more well-rounded picture of performance, add peer evaluations to the process.

Survey 2-3 of the team members who work closely with the employee in question.

Peer evaluations are often helpful in providing an on-the-ground perspective that people managers and leadership might not have visibility to.

Use this [performance review template](#) that includes the self-evaluation, manager's evaluation and peer evaluation components.

## SAMPLE TIMELINE FOR SEMI-ANNUAL PERFORMANCE REVIEWS

Action	Details	When
Communicate process and timeline to the team	<ul style="list-style-type: none"> <li>• Give your team a heads up that performance reviews are coming up</li> <li>• Let them know when they will be sent their self evaluation forms, and when they need to complete them</li> <li>• Let them know when their managers will be completing the manager's evaluation forms</li> <li>• Let them know when they can expect to have their performance review meeting with their manager, and who will be scheduling them</li> </ul>	Sep 1
Schedule performance review meetings	Managers to send calendar invites for 1-hour meetings for each team member sometime from April 18-29	Sep 8
Employees to complete self evaluations	Send each employee a self-evaluation form and provide them with 1 week to complete it	Sep 8-15
People managers to complete manager's evaluations	Send people managers one evaluation form for each employee they manage, and provide them with 2 weeks to complete them	Sep 8-15
Conduct and document	<ul style="list-style-type: none"> <li>• The employee and manager review the self-evaluation and manager's evaluation</li> </ul>	Sep 18-29

performance discussions	<p>together</p> <ul style="list-style-type: none"> <li>● Discuss each point and elaborate as needed</li> <li>● Address any discrepancies / potential misalignment</li> <li>● Provide constructive feedback on how things can improve (this goes both ways)</li> <li>● Thank the team member for their contribution!</li> </ul>	
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## Ongoing 1:1s

Regular check-ins and touchpoints between manager and employee is an essential part of on-going engagement and performance management. While in most organizations this happens organically, it's especially important to ensure they serve a purpose that benefits both the personal needs of individuals, and the overarching business goals.

- Consider creating templates and process guides for managers on how to conduct 1:1 meetings with employees – this will ensure consistency and a persistence of quality as new managers are hired / promoted
- Considering creating manager training materials (e.g. slide decks, documents) on how to have effective 1:1 meetings and / or effective coaching conversations
- Documenting the 1:1's and having a general record of communication can also be very helpful if someone's reporting relationship changes. These conversations will also form the basis of the Manager's Appraisal come time for the employee's performance review.
  - Cadence
    - At a minimum every other week
    - Ideally, once per week
  - Structure (30 minutes)



- Water-cooler talk
- What's going on work-wise
- Any asks / barriers to remove
- Feedback / questions regarding any recent changes in the office / team, when applicable
- From week to week, choose the most relevant questions to cover from our template of 1:1 questions

Reference this [sample list of 1:1 questions](#) to tailor this process to your individual team members.

## Performance Scorecards

Scorecards are about setting measurable criteria to evaluate performance over time. While quantitative data helps provide valuable context on how to interpret performance, qualitative measures of performance are necessary to provide baselines to determine whether an employee is meeting expectations or needs to improve. Create templated scorecards for all employees as a basis for establishing and measuring acceptable levels of performance, and to help identify areas of strength and areas of improvement for employees.

Scorecards are a key driver for an employee's success, as it:

- Creates accountability for the employee
- Collects independent data points about the employee's performance
- Develops alignment between a manager's expectation and employee's performance
- Highlights areas for development for the employee
- Aligns an employee with the organization's vision and strategy

For people managers, scorecards help provide a bird's eye view on a monthly and annual basis. Data collected in a scorecard can be tied into conversations around performance, compensation increases, promotions, and areas for development.

### **How people managers can create scorecards for their team members:**

1. Identify the roles within your department
2. Define unique roles within your department and divide them into appropriate job levels
3. Create a template for your department roles by breaking down each role into:
4. Key components of the position (key competencies, key deliverables, key areas of expertise, etc.)
5. Break down each component into categories and subcategories as appropriate
6. Define the objective and KPI for each subcategory

Use this [performance scorecard template](#) to create unique scorecards for your individual team members.

### **Performance Improvement Plans**

Performance Improvement Plans (PIPs) are specific processes designed to accomplish two things: 1) formalize the way you address critically underperforming employees in a way that is constructive, and maximize chances for improvement, and 2) ensure that proper documentation is in place in the event that performance does not improve to acceptable levels.

### **When to use a PIP?**

- A PIP should be used only if there is a real commitment from the people manager and leadership team to help the employee improve, not as a way for a frustrated manager to start the termination process.
- Only use a PIP if a structured plan with time-sensitive goals is the appropriate next step that will serve as an aid to the employee rather than a detriment.
- Use a PIP only if this goal-oriented process is well suited to address the specific performance issue at hand. PIPs might be more effective at addressing problems with quantifiable objectives as they can help identify why the deficiencies occur.

### **When not to use a PIP?**

- When an employee has been with the organization for a long time and they have never been given feedback or training to improve the specific performance concerns. A PIP would not be effective here as this would require a longer-term approach.
- When the sole intention is to create a paper trail and the end goal is to terminate the employee.
- When the employee's competencies are significantly misaligned with the job requirements, or when the core issues are insubordination or insolent behaviours.

Create a formal process for PIPs, outlining responsibilities of both the employee and manager when once is put into effect (i.e. timeline of each step, expectations, drafted communications, etc.)

Use this [performance improvement plan template](#) as a plug-and-play resource for managers and employees to track performance progress during the PIP period.