

PERFORMANCE REVIEW

(AKA the annual evaluation)

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- ▶ Retired from the public healthcare system in 2023 after 13 years of service in senior management roles.
- ▶ Over 30 years of experience in Human Resources in small, large, private and public organizations.
- ▶ Worked for Voice of English-speaking Quebec after completing my Masters degree in Industrial Relations in 1990.
- ▶ Have served on many boards of not-for-profit organizations including Voice of English-speaking Quebec.
- ▶ Presently serving as a consultant for the 18 member associations under the Regional Development Network umbrella.
- ▶ Happy to be here to meet you!

Cathy's performance review



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PERFORMANCE REVIEW

The performance review is a thoughtful and considered process to review a staff member's performance during the evaluation cycle. The goal is to highlight strengths, address performance issues, and develop unused skills and abilities.

Remember, this is a constructive exercise; it is not meant to cause anyone an undue amount of stress.

***Townshippers has graciously accepted to allow me to use some of the tools they have developed for the purposes of this workshop.

What a performance review is not...

- ▶ The time to bring up disciplinary or performance issues that have not been previously addressed or followed-up on.
- ▶ An opportunity to spring new responsibilities and expectations on an employee without discussing them beforehand.
- ▶ A one-way « discussion ».
- ▶ The only time in the year that you meet your employee one-on-one.

Traditional elements of the performance review

- Punctuality, attendance
- Communication with colleagues and clients
- Leadership
- Autonomy
- Strengths and areas for improvement
- Objectives: review of previous objectives and establishing new objectives
- Development / training

The performance review has to be adapted to the level of responsibility of the employee.

How to prepare

- Inform the employee of the exercise at least a week in advance and set a date for the meeting.
- Choose a meeting area that is quiet and allow at least one hour.
- Clear your calendar.
- Review the employee's job description.
- Review documentation (including last year's evaluation) relating to the employee's objectives and competencies. *You should not ask staff to provide feedback to you about their colleagues for the purposes of this exercise.*
- Prepare your draft but be ready to modify the information based on the discussion at the performance review.

During the performance review

Elements to consider discussing

- ▶ Is the employee really doing what their job description indicates?
- ▶ Does their skillset effectively contribute to the productivity of the organization?
- ▶ Are they able to organize, plan, and manage their time effectively?
- ▶ How well do they work with their colleagues? Do they communicate effectively? What/how do they contribute to the work environment?
- ▶ What were their major accomplishments over the past year?
- ▶ What areas do they need to improve on in the course of the next year? Remember that objectives that are built on their strengths have a better chance of meeting with success.

- ▶ What do I consider the important abilities required by this employee to effectively do their job?
- ▶ Have I noticed this employee prefers certain task/responsibilities over others? What are they?
- ▶ Is this person in need of more experience and training?
- ▶ Has this employee done anything for their personal and/or professional development during the evaluation period? Review the past year's performance review to see what was discussed.
- ▶ Can you identify a skill or ability that this employees possess that is not being effectively used in their current role?
- ▶ What are specific things this employee needs to do in the next year for their own development? How can the organization help with this in the next year?

Setting objectives

- Ideally, the objectives should be decided together. The employee will have more motivation to achieve the objectives if he or she participated in the process.
- When establishing objectives, use the SMART method:
 - ❖ **S**pecific
 - ❖ **M**easurable
 - ❖ **A**ttainable
 - ❖ **R**elevant
 - ❖ **T**ime-bound
- Broad strokes can be established in the performance review but more detailed work can be done in the following weeks.
- You may ask the employee if there is anything you can do better as a manager and what support they may need to be able to offer the best possible performance and achieve the objectives set out.

Writing the review

- Take into account what the employee adds to the discussion.
- Make certain you are thorough and professional in your approach and language; write, review, and revise your assessment of each employee to ensure accuracy and objectivity.
- If there have been performance issues or disciplinary situations that have taken place and been dealt with during the evaluation period, they may be included in your assessment but take care not to do so in a manner that makes the employee feel as though the issue is hanging over their heads or was not adequately resolved in your eyes
- Remember that aspects of the review may come into play at a later moment and you do not want to be faced with a WOW review if it was not the case.

Other potential discussion points

- Do they feel they are using their skills to the benefit of the organization?
- What keeps them in the organization?
- What would they improve if they could?
- What opportunities would they like to explore? A transversal “promotion”, job shadowing, more responsibilities, developing new programs, etc.
- Do they have any specific needs that can be met by the employer?
- What kind of recognition, formal or informal, is important to them?
- Do they have any personal objectives that they would like to include in their performance review?

To rate or not to rate...

- What is the purpose of a rating system? Is it really necessary?
- A number system is traditionally used. This very subjective method may cause anxiety for both the employee and the employer.
- It is also possible to use a colour system.

Green: In line with the position

Yellow: May need for training or coaching to reach the required level

Red: A significant and immediate fix is required

Blue: Exceeds the expectations of the position

Follow-up meeting

- Inform the employee of your assessment.
- If the employee does not agree with your assessment, welcome any comments and they can choose to add their comments in the final version if they so wish.
- Have both parties sign the copies: one copy is given to the employee and one copy is placed on the official personnel file.
- If an employee does not want to sign the performance review, note the reasons invoked by the employee on the form and file it.

What to do if your employee is underperforming

- The performance review should not be the first time you address this situation. The performance review should reflect the process of managing performance issues that should already be in place.
- If the process is not underway, it is time to start!

Mid-term performance review

- Instead of waiting a whole year to review the objectives set, plan a mid-term review. Things change in six months. Have they started to work on some of those objectives.
- It could be an opportunity to review the mission, vision and values of the organization and the role they believe they play in contributing to these.

Performance review for the probation period

- ❖ A performance review should be done mid-way through the probation period. Do not wait until the last day!
- ❖ A more condensed form can be used.
- ❖ Discuss the positive aspects and areas where improvement is necessary.
- ❖ Discuss training needs.
- ❖ If there is doubt about the ability of the employee to meet expectations:
 - Consider extending the probation period (to be confirmed in writing and placed on the employee's file).
 - Consider ending the probation period and terminating the employee.

"It is far better to be alone, than to be in bad company." George Washington

Recognition

- The performance review is a form of recognition. It is appreciated by most employees and when done right, is a great motivational tool.

QUOTES FROM ACTUAL PERFORMANCE EVALUATIONS

- Since my last report, this employee has reached rock-bottom and shows signs of starting to dig
- His men would follow him anywhere, but only out of morbid curiosity
- I would not allow this employee to breed
- This associate is really not so much of a has-been but more of a definitely won't be
- He would be out of his depth in a parking lot puddle
- This young lady has delusions of adequacy
- This employee should go far - and the sooner the better
- This employee is depriving a village somewhere of an idiot
- He sets low personal standards and then consistently fails to achieve them



QUESTIONS?

P.S. There are no stupid questions.

I am available to discuss any situation you might have.