

# Good to do

Helping you understand performance management



## Understanding Performance Management



Performance management is an integrated process which supports effective management of people and teams to achieve individual and organisational performance. It does this by establishing a shared understanding about what is to be achieved, and links the organisation with its people. It ensures performance improvement, continuous learning and development of people and teams, and encourages people to behave in a way that enhances their working relationships.



Identify and list below **six** characteristics of an effective performance management system:

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2.

3.

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5.

6.

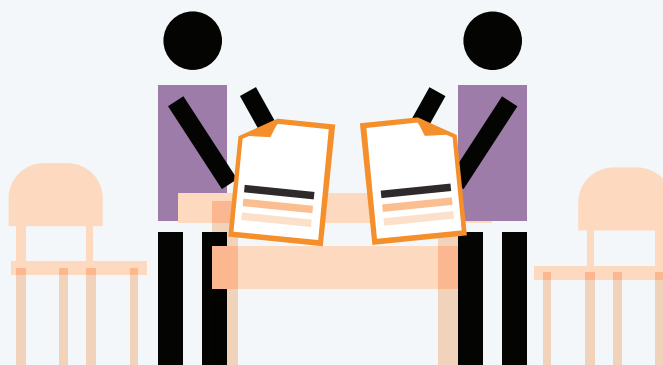
The performance management process involves (1) agreeing clear personal SMART objectives that contribute to the organisation's goals (normally during an appraisal meeting), (2) providing regular feedback on performance and (3) supporting people's development and success.

SMART objectives are people's expected key accomplishments for the next period, generally one year. They are a way of prioritising the most important expectations of their role. They also act as a measure of success for evaluating performance and generating regular feedback during the year.

During the appraisal meeting, SMART objectives are usually also set for development, in line with work objectives.



Explain in your own words the uses of SMART objectives and priorities:



An appraisal is a collaborative question based conversation between a team member and their manager about their performance and development and the support they need in their role. It is an opportunity for the team member and their manager to reflect on how the employee is performing within the organisation and to identify ways to increase performance and satisfaction.

It is used both to assess recent performance and focus on future objectives, opportunities and resources needed.

This means that both manager and team member need to prepare for the meeting which should be held in private in a quiet place without interruptions. Both of them need to be clear about the performance expectations.

At the meeting, the manager needs to give their team member effective feedback on their performance, one section or objective at a time, and ask their team member open questions about how their work is going and any support needs they may have.

The team member should be given the opportunity to ask clarifying questions and raise any suggestions or issues. Work objectives and development objectives and learning activities for the next period, and a date for the next follow up review should be agreed and written down.



In your own words, describe best practice in conducting appraisals:

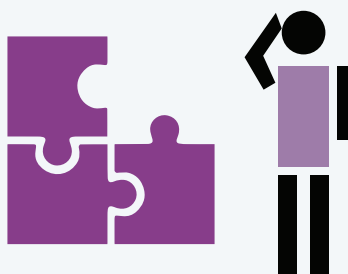


Ideally you would like all of your team members to perform effectively all of the time. However sometimes issues may arise that limit their capacity. For example:

They may not be aware of what is expected of them.

They may not know how to do something in their job.

They may be unable to work effectively for some reason that may be work related or due to an outside factor, anxiety or worry.



Giving people an opportunity to talk about things that concern them will help you to identify issues that you may be able to help manage, offer some guidance, or refer them elsewhere for help.

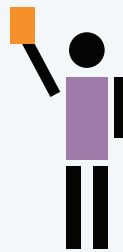
As a manager, you have a responsibility to provide a good quality of working life. You and your organisation has a legal obligation to minimise risk to people's health & safety.



In your own words, explain the factors to be taken into account when managing people's well-being and performance:

In situations where there is misconduct or consistently poor performance, you may have a disciplinary situation.

In situations where your team member has a serious problem or complaint that you, as their manager, have been unable to resolve informally, they may wish to raise it formally as a grievance.



Find out about your organisation's policies and procedures for dealing with disciplinary matters and grievances. In your own words, explain the importance of following these disciplinary and grievance processes:

In both situations, organisations have very clear policies and procedures for handling the situation and which comply with the law. Managers in many organisations are expected to handle these situations in the early stages and they must follow the stated process.

However you should keep HR informed throughout as they are able to give you specialist advice as you work through the procedure in line with your organisation's policy.

