

Good to know

Performance Management

Managing tasks

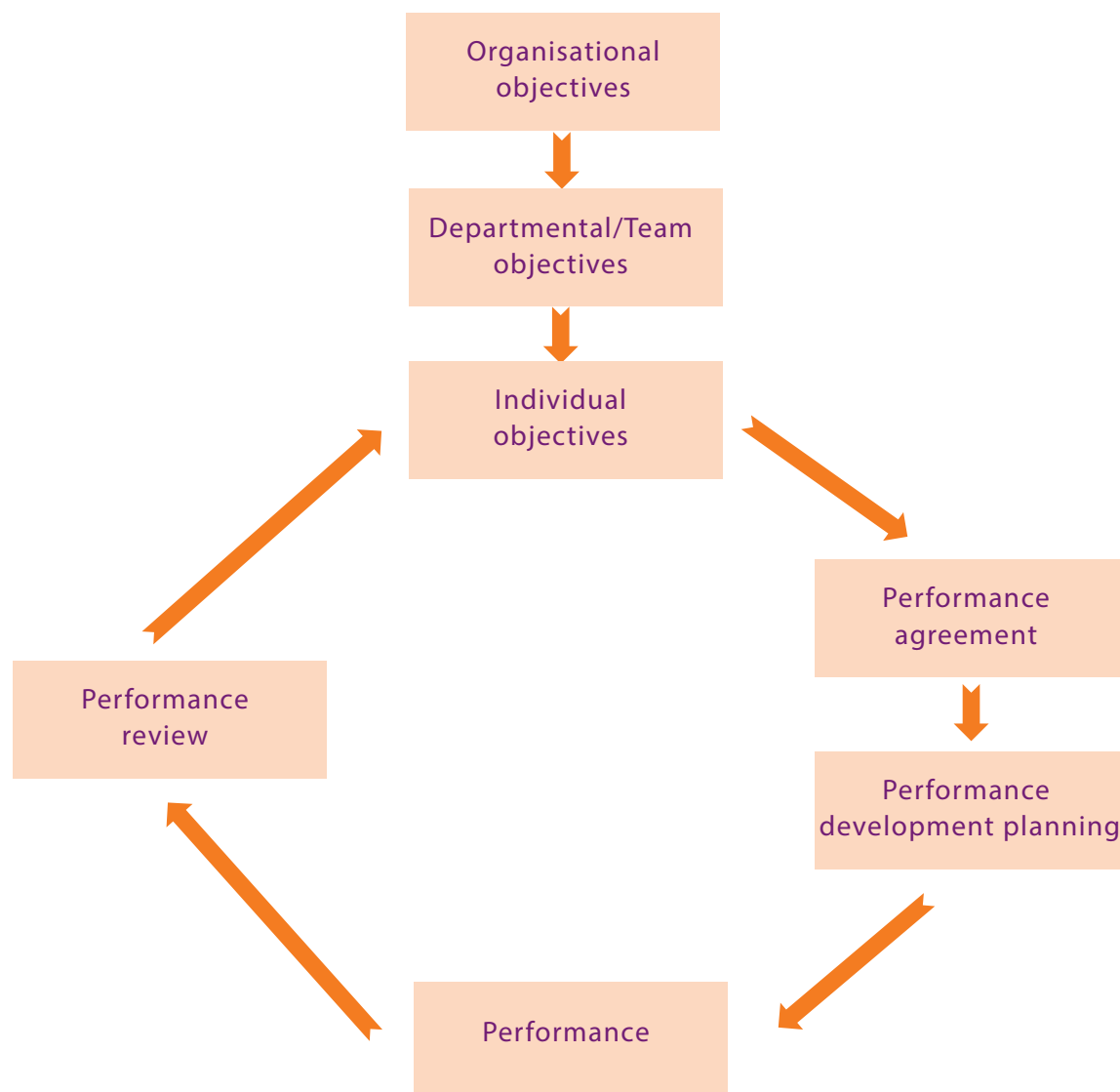
Effective performance management makes sure all your people contribute to achieving the overall organisation's purpose and improve their performance over time. Your organisation's objectives are cascaded down to departmental, team, and then people's individual objectives, which you agree jointly with them at a performance and development review meeting.

You also jointly review and evaluate their work over the past period including, achievements, progress, and any issues. You agree their learning needs and development actions for gaining new knowledge and skills for their personal development plan.

You monitor and evaluate their performance over a specified period, providing regular and timely feedback. They revise and update their personal development plan as a result. The process encourages self-management and continuous improvement and development. It relies on co-operation and consensus.



Performance management process





SMART Objectives

Objectives are a way of describing what the organisation, departments, teams and individual people are expected to achieve at work over a period of time. They can be work related, describing the results to be achieved, for example:

- To arrange and carry out a performance appraisal with every member of my team by the end of this year.

SMART objectives can also be developmental, describing what the person needs to do to increase their knowledge or skills in specific areas, for example:

- To have at least two coaching sessions within the next two months by my manager in giving appraisals, and submit a short summary of new understanding.

Objectives are a way of describing what the organisation, departments, teams and

S	Specific/Stretching	Clear, unambiguous, straightforward, challenging
M	Measurable	Quantity, quality, time, money
A	Achievable	Though challenging, within the reach of a competent, motivated person
R	Relevant	Relevant to organisation's objectives, department or team
T	Time-bound	To be completed within an agreed time frame

SMART objectives provide a way of jointly agreeing expected work outcomes. They are the reference point for continuous assessment and evaluation of people's work, or their development. They provide feedback information you both need for monitoring performance and agreeing what the person has done, spotting any shortfalls in meeting expectations, agreeing changes required by circumstances, as well as action to improve performance. They provide a shared basis for setting new objectives for the next period.



Appraisal

You and your appraisee should prepare in advance for their performance development meeting, or appraisal, to make sure it is a two-way exchange of views, rather than a top-down interview, of what the person has achieved compared with their agreed objectives, what they need to do to achieve more, and what they think about their work.

Together you can then agree how they need to develop further, any areas for improvement and how this may be achieved. If you have been communicating and giving them feedback regularly, there should be no 'surprises'. Encourage the person to assess themselves, so they will do most of the talking. Listen actively to what they have to say, and keep the whole period, usually annual, under review as you give them feedback about what has been done well and spotting improvement opportunities.

This review is the basis for a development plan to be acted on by your appraisee with your support. You also agree their SMART objectives for the coming period. Issues they identify may give input to your team or departmental plans. End the meeting positively, confirming agreed actions and how they will be reviewed. After the meeting, write down jointly what has been agreed.

Organisations have a social responsibility to provide a good quality of working life. You also have a legal obligation to minimise risks to your people's health & safety. People contribute more to the organisation when they are free from worry and anxiety.

Giving people an opportunity to talk about things that concern them will help you to spot issues that you may be able to help them manage, offer some guidance, or refer them elsewhere for help. If people believe their personal issues will be revealed to others, they will be very unlikely to confide in you, so respect their confidentiality. Organisations sometimes provide staff support services, for example:

Individual	Counselling, sickness, bereavement, employment issues, domestic issues, child care facilities, retirement issues
Group	Restaurant facilities, social activities, sports activities

You can find about what services are available by speaking to your HR department.

Make sure people are aware of the organisation’s policies on health and safety, of any hazards and that they do not take risks that may result in injury.



Disciplinary and Grievance Processes

Your organisation’s grievance and discipline processes set out the steps which must take place in accordance with legal requirements and ethical considerations. Therefore it is important that you follow them precisely.

When you discipline or dismiss someone you need to be sure you have sufficient reason for dismissal, and that you act reasonably in the circumstances. Following the disciplinary process will help to make sure you do this and act within the law.

References

- Bacal, R. (2004) How to Manage Performance, publ. McGraw-Hill
 Hope, J., and Player, S. (2012) Beyond Performance Management, publ. Harvard Business Review Press
 Jones, P. (2013) Performance Management Pocket Book, 2nd ed., publ. Management PocketBooks Ltd