

**KVHRA**

## The Performance Management Cycle

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# Performance Management Cycle

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## Performance Planning:

- Outline of individual performance goals, and is usually done annually.
- Can be updated and revised.
- Specific, measurable, and mutually agreed on by the staff member and the supervisor.

## Performance Coaching:

- Employee feedback on how well they are performing.
- Know what actions/behaviors they should keep, start, or stop in order to achieve their goals.
- Active and ongoing process between the supervisor and staff member.
- Regularly scheduled coaching sessions to give the staff member adequate opportunity for improvement.
- Informal coaching to give “just in time” feedback and offer support.

## Performance Evaluation:

- No surprises for the employee at performance evaluation time.
- Objective summary of the staff member’s efforts, results, and an assessment of the staff member’s level of goal achievement.
- Objectivity is key here.
- Rating is based on the performance plan and any subsequent coaching agreements.

**A process, not an event!**

## EMPLOYEE SELF EVALUATION

EMPLOYEE NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

EVALUATOR: \_\_\_\_\_

1. What were your principal accomplishments in your areas of responsibility since your last evaluation?

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2. Within the areas of your responsibility, what are things you could improve or build upon?

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3. Having reviewed your position description, do your areas of responsibility fit your position description? If certain areas do not, what adjustments do you feel should be made?

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4. What aspects of your job are you most satisfied with?

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5. What aspects of your job are you least satisfied with?

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# Building Good Appraisals

1. Update job descriptions annually.

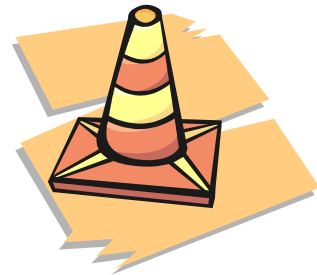


2. Role Model – Evaluate yourself before you evaluate others.

3. Plan and prepare.

4. Create Climate.

5. Evaluate performance – not the person.



6. Ask for opinions.

7. Be candid, specific, and open.

8. Set specific objectives.

9. Listen.

10. Build on strengths.



# Setting Goals for Future Development

## What is a Goal?

A goal is an important result that improves the performance of the company, the department, the function, or the individual. It is a statement of what needs to be done when and (if appropriate) at what cost.

Goals are intended:

- To move the business, function, or job beyond the status quo (i.e.: what happened last year).
- When achieved, they will generally result in tangible measure improvement against agreed criteria.
- Raise the achievement level, add value, yield extra benefit, or make substantive permanent improvement.
- Require extra planning and effort beyond normal job requirements. If the goals were not set, the desired result would typically not materialize.

## How to Write Goals

Goals should reflect a desirable and visible change (plus or minus) or an end result within a targeted period, e.g., to add, increase, decrease, improve, develop, design, reduce, etc.

## SMART Guidelines



**S** – Specific

**M** – Measurable

**A** – Attainable

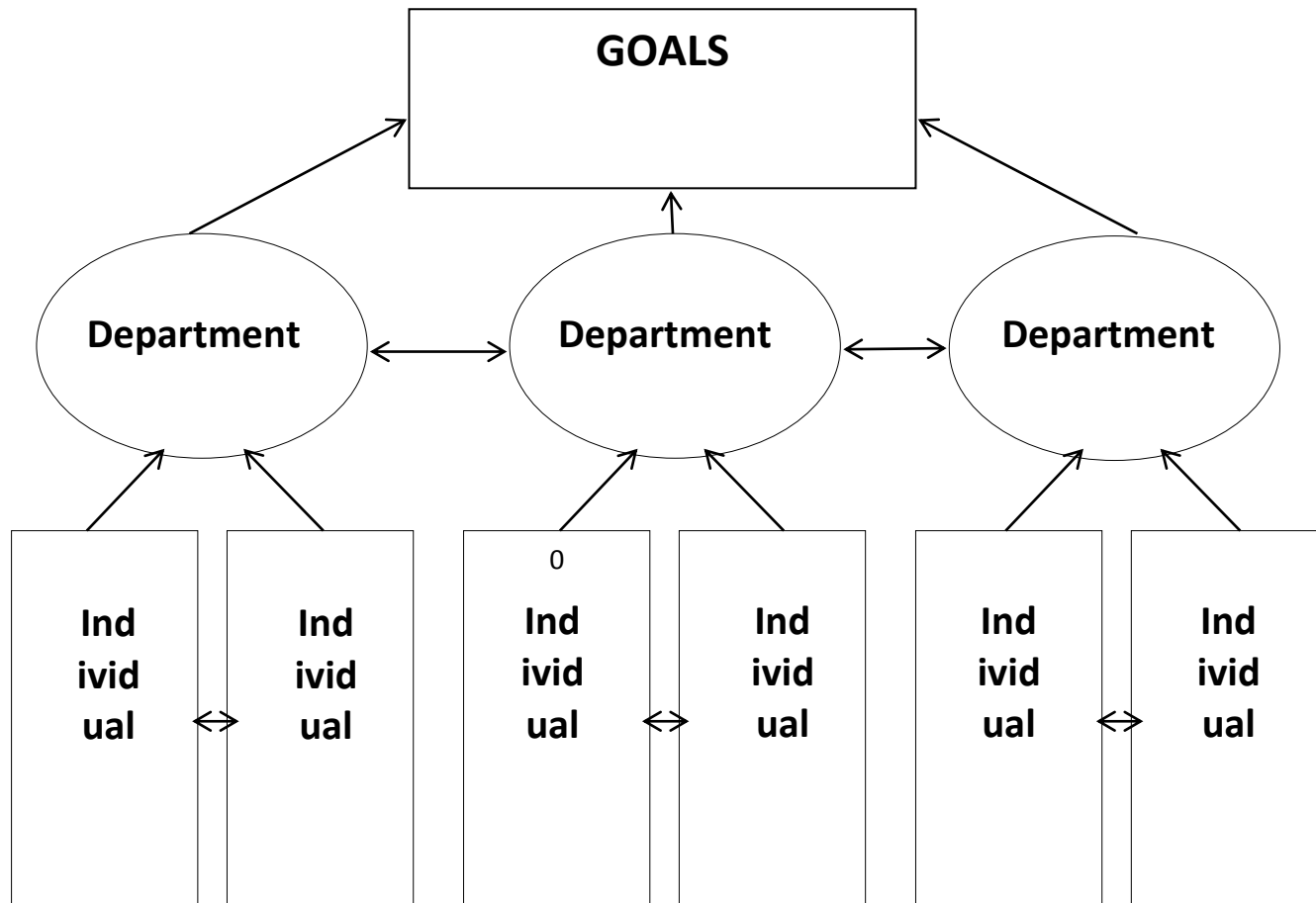
**R** – Relevant

**T** – Time bound

# Goal Linkage

For a company's goals to be implemented effectively, a linkage is necessary from the office of the president vertically throughout the entire organization. Ideally, all employees should have within their annual goals a connection to, and be in support of, the company's goals.

Goal linkage can also be established horizontally through an organization in support of a key goal, which affects each major functional area.



# Goal Worksheet

Goal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Key Action Steps:

Target Date

Actual Date

a. \_\_\_\_\_

\_\_\_\_\_ --

\_\_\_\_\_

b. \_\_\_\_\_

\_\_\_\_\_ --

\_\_\_\_\_

c. \_\_\_\_\_

\_\_\_\_\_ --

\_\_\_\_\_

Strategies and Tactics:

\_\_\_\_\_  
\_\_\_\_\_

Resources and Constraints:

\_\_\_\_\_  
\_\_\_\_\_

Measurements:

\_\_\_\_\_  
\_\_\_\_\_

Cost To Achieve Goal:

Planned

Actual

a. \_\_\_\_\_

\_\_\_\_\_ --

\_\_\_\_\_

b. \_\_\_\_\_

\_\_\_\_\_ --

\_\_\_\_\_

c. \_\_\_\_\_

\_\_\_\_\_ --

\_\_\_\_\_

Benefit: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Progress Notes:

\_\_\_\_\_  
\_\_\_\_\_

## **What is Coaching?**

- In Performance Management Cycle providing ongoing feedback and support to employee throughout the year.
- Creates a genuinely motivating climate for performance.
- Improves the match between an employee's actual and expected performance.
- Increases the probability of an employee's success by providing timely feedback, recognition, clarity and support.

## **Foundations of Coaching**

- Trust!
- Employees want to succeed at work.
- Employees can contribute ideas on how work should be performed.
- Employees will work hard to achieve goals that they have helped to set.
- Employees are open to learning if they recognize the value to them - improved success on the job and subsequent reward and recognition.

## **The Coaching Role**

- Providing Direction –goal linkage, understanding priorities, learning new tasks.
- Improving Performance – assessing current capability, identifying needs, creating a safe environment for creativity and risk taking.
- Opening up Possibilities – developing employee capabilities to solve problems, make decisions, asking right questions, challenging thinking.
- Removing Obstacles – paving way for employee's success, confronting people or acquiring resources.



## Giving Feedback

Type	Definition	Purpose	Impact
<b>SILENCE</b>	No response provided. No news is not good news!	Maintains Status Quo	<ul style="list-style-type: none"> <li>Decreases confidence (long term)</li> <li>Reduces Performance (long term)</li> <li>Creates surprises during performance appraisals</li> <li>Can create paranoia and insecurity</li> </ul>
<b>CRITICISM</b>	<p>Identifies behaviors or results that were undesirable, not up to standard.</p> <p>Example: "Sue, you did a poor job running that meeting this morning."</p>	Stop undesirable behavior/results	<ul style="list-style-type: none"> <li>Generates excuses and blaming of others</li> <li>Tends to eliminate other related behaviors</li> <li>Decreases confidence and self-esteem</li> <li>Leads to escape and avoidance of manager and work</li> <li>Hurts relationship</li> </ul>
<b>ADVICE</b>	<p>Identifies behaviors or results that are highly regarded and often specifies how to incorporate them on the future.</p> <p>Example: "Sue, let's discuss some guidelines on conducting effective meetings before your next staff meeting so you feel good about the process."</p>	Shape or change behavior/results to increase performance.	<ul style="list-style-type: none"> <li>Improves confidence</li> <li>Can improve relationship</li> <li>Increases performance</li> </ul>
<b><u>REINFORCEMENT</u> (Positive)</b>	<p>Identifies behaviors or results that were desired; up to or exceeding standards.</p> <p>Example: "Sue, I noticed how you planned and posted an agenda before your meeting today. I think that really kept the meeting focused."</p>	Increased desired performance/results	<ul style="list-style-type: none"> <li>Increases confidence</li> <li>Increases performance</li> <li>Increases motivation</li> <li>Increases willingness to take on new tasks and be more visible</li> </ul>

# How To Give Feedback

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1. Make your feedback specific as related to behavior.
2. Consider your timing, either before the event in the form of advice, or immediately after it as positive feedback.
3. Consider the needs of the person receiving the feedback as well as your own. Ask yourself what he or she will get out of the information. Are you “dumping” or genuinely attempting to improve performance or the relationship?
4. Focus on behavior the receiver can do something about.
5. Solicit feedback rather than impose it.
6. Avoid labels and judgements by describing rather than evaluating behavior.
7. Define the impact on you, the unit, the team, and the company.
8. Use “I” statements as opposed to “you” statements to reduce defensiveness and ask for a change in behavior.
9. Check to be sure clear communication has occurred.
10. Give the feedback in a calm, unemotional language, tone, and body language.