

Performance management

Keeping performance on track

Regular discussion between a staff member and their manager or supervisor about performance on the job is fundamental to staying on track. In addition to making these discussions more effective and efficient, a consistent approach across teams will increase the likelihood of the organisation aligning individual performance with strategic objectives.



Tips

Use the **Workforce Capability Framework** as a 'checklist' for the relevant job family and job level. This gives the discussion an ongoing 'whole-of-job' focus and need not take much time.

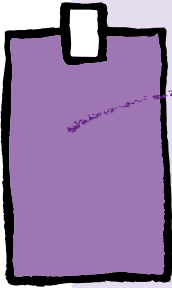
For example, the manager or supervisor can quickly work through all the **strategic core requirements** to see if there are any points either they or the staff member need to raise – sector and organisation purpose & values, leadership/ teamwork, communication, customer relationships, personal accountability, innovation. This means the staff member will become familiar with the topic areas and the order in which they are discussed.

Make sure the discussion includes factors such as working as part of a team or communicating with other parts of the organisation – areas covered by the **strategic core requirements** in the Workforce Capability Framework. This enables communication beyond the typical discussion between a staff member and their supervisor or manager. For a direct service role, a typical supervision discussion might focus on service-related procedures and customer issues and place less emphasis on the whole role, to the detriment of 'whole-of-job' performance.

By working through all relevant areas in the Workforce Capability Framework, most of the conversation will be positive as it puts feedback on areas for improvement or development in the context of the whole job. This makes the regular supervision process much more agreeable for both parties.

Avoid an environment where manager or supervisor and staff member perceive that regular meetings are only about 'problems'.

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Tips

Ensure that the performance expectations for the staff member's role are aligned with the relevant job level capabilities, as described in the Workforce Capability Framework. This will more likely result in regular discussions about performance that are also focused at the right level of capability required for the job.

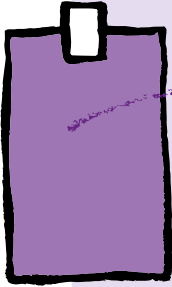
Adopt a consistent approach to all the discussions between a manager or supervisor and their staff members, and spend as much time preparing the approach as needed. It is more efficient to have these discussions in a regular and familiar way than having to devise a separate approach for every discussion or meeting. This will result in worthwhile sessions with all staff members in the team.

Meet or discuss regularly and efficiently, as a minimum, once every three months **specifically** for the purposes of staying on track with performance. Meetings may be face to face but can be conducted by phone, Skype, etc. These are distinct from regular supervision, work-related catch-ups or operational meetings that have a different focus – usually service delivery, quality, compliance, and so on. Managers or supervisors can plan their year's diary to include regular performance-oriented meetings with each team member. This gives these discussions appropriate priority in everyone's timetable and creates a series of worthwhile and identifiable milestones, e.g. each quarter.

Focus on reviewing progress. Do this in a way that works for both parties. The staff member may prefer a discussion that follows a logical sequence in the context of their own work – daily schedule, regular customers, etc. The manager or supervisor then interprets the matters raised in terms of the capability requirements and performance measures applicable to the role.

Think of the conversations as being about developing the capabilities required for success, rather than a strict review of performance. These are progress discussions towards achievement against a clearly established, and agreed, set of performance measures, rather than just regular supervision discussions, for delivering positive and negative feedback, providing guidance and support, etc.

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Tips

Keep notes of issues raised by either party, key discussion points and details of agreements reached on any action required. Use these notes as a point of reference in your regular supervision discussions and at milestones. They will also be invaluable at the end of the review period when forming a consolidated picture of the staff member's performance during the period.

The manager or supervisor should aim to act as a coach and supporter in these regular conversations. The relationship and conversation does not need to be driven by formal line management responsibility or specific organisational policy. As a result, each party has more discretion as to the appropriate style and approach to the conversation.

Stay flexible, and if a discussion is needed about a performance issue (or an achievement) but is not scheduled, go ahead and have it anyway. The longer the gap between becoming aware of a work outcome and discussing it, the less likely the discussion is to be effective, irrespective of whether it concerns positive or negative feedback. As a manager or supervisor, try to provide praise and/or feedback when the results are achieved. The details can be followed up in subsequent discussions.

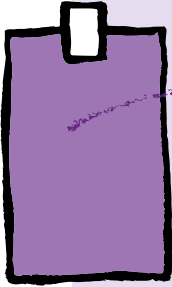
Always use concrete examples when providing feedback, and ensure that the facts are clear and ideally are also agreed on. Feedback that is loosely based, reliant on generalisations or misinformed will not help to achieve performance measures.

Feedback provided to a staff member in the area of customer relationships (taken from the strategic core requirements) is sometimes along the lines of, **'I think you need to be providing Joan with more assistance in meeting her needs and expectations.'**

e.g.

It is much better to say, 'Last month I sat in with you while you were supporting Joan. She told you about how she would like to make a pot of tea when she has visitors and how she can't lift the china teapot. Do you recall that conversation? How did you respond? What advice and support could you have given her and put in place for the future? This is the type of response that I am expecting from our support workers in this situation. Can you think of other things that Joan has raised where you could be responding differently?'

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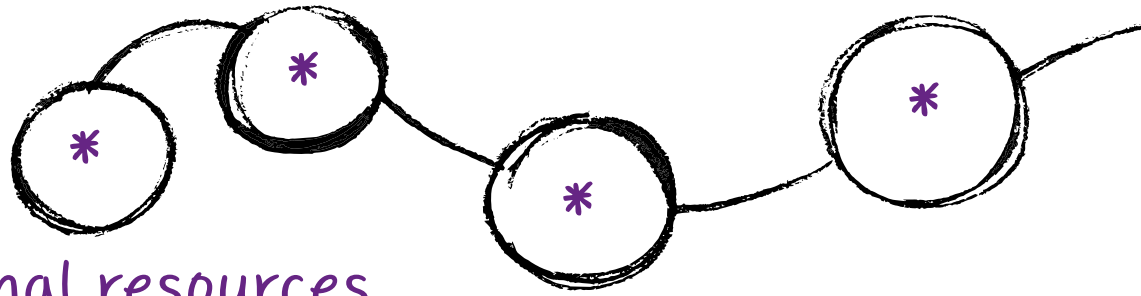


Tips

Be prepared as a manager or supervisor to use observation and feedback from clients and other staff to support your conversations with a staff member, in addition to concrete examples of their work.

Do not resort to using email to keep performance on track – work performance issues need to be discussed and the level of translation and understanding on the part of the staff member needs to be assessed and supported in discussion. Email is fine for confirmation of meeting points or for record-keeping after the discussion.

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Additional resources

- * The Workforce Capability Framework
- * The disability career planner and capability framework implementation guide
- * Tips – agreeing performance expectations
- * Technique, tips and template – writing position descriptions
- * Tips – using the ‘good day and bad day’ tool to keep performance on track
- * Tips – using ‘praise and trouble’ in supervision
- * Tips – using ‘stress and support’ in supervision
- * Tips – using ‘what’s working/not working’ in performance planning, support and supervision
- * Tips – preparing for and conducting performance review discussions

Definitions

The term **individual(s)** refers to an individual with a disability and their family and/or circle of support.

The terms **staff/employee(s)** refer to paid or unpaid members of the workforce regardless of their employment relationship with their employer i.e. permanent, casual, full-time, volunteer, etc.

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