

Yukon Links to Learning - June 17, 2019

# PERFORMANCE MANAGEMENT

Two Eagles HR Consulting

# INTRODUCTION

- About Two Eagles
- About you - takeaways
- Session outline
- Learning objectives
- Protocol

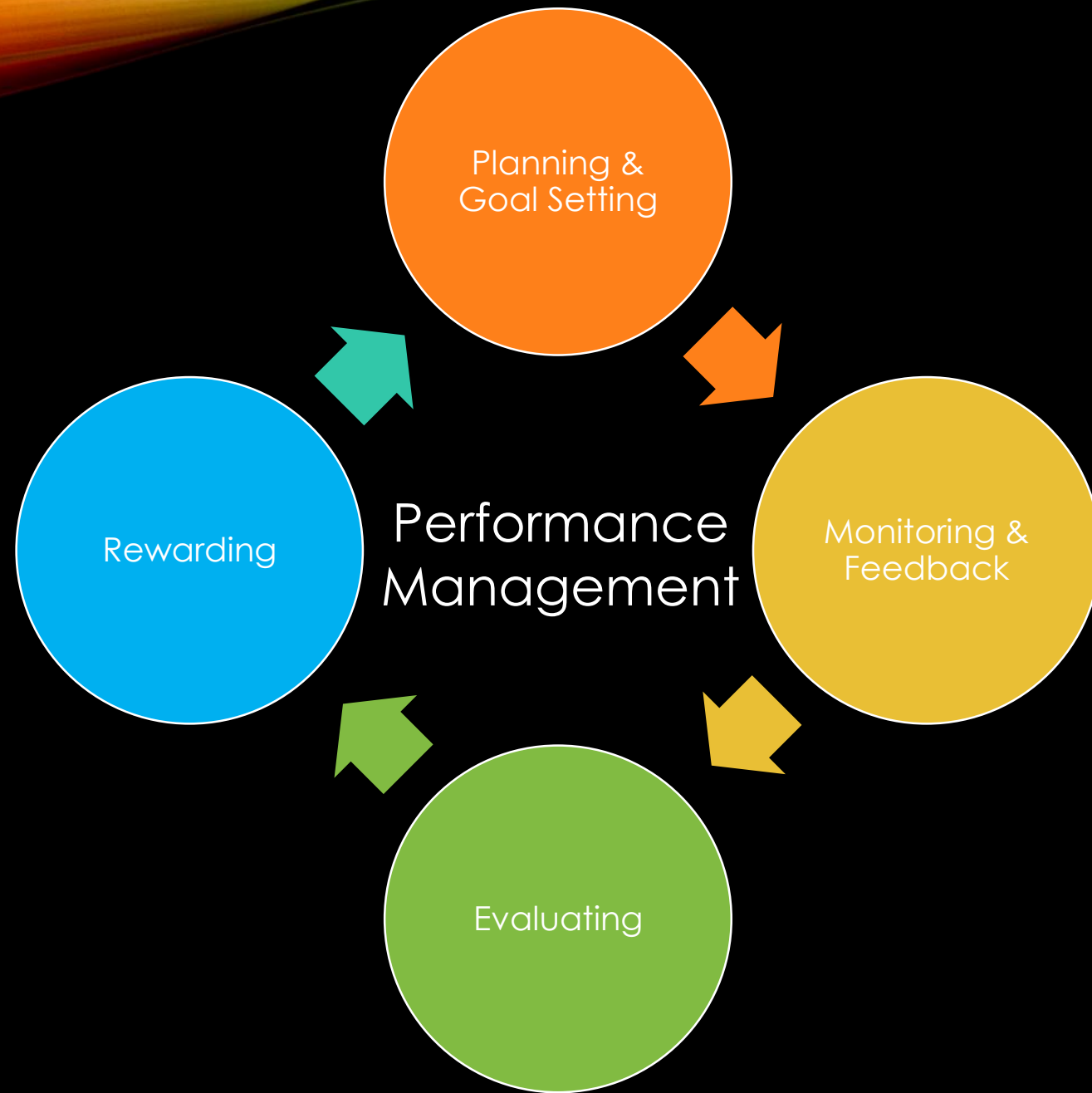


# PERFORMANCE MANAGEMENT - WHAT IS IT?

- It is a PROCESS - it is not performance evaluation in and of itself!
- It is a process for capacity building
- It is based upon an ongoing two-way communication process between you and your report(s)
- It occurs through direct communication, formal and informal, throughout the year as necessary
- Communication process outcomes are measurable, monitored, evaluated, followed up on and documented.



Continuous Supervision Training  
Priorities Communication Grow  
**PERFORMANCE**  
**MANAGEMENT**  
Feedback Development HR  
Improvement Employees  
Objectives Goals Corrective  
Direction Job Descriptions Review  
Coaching Promote Monitor Reward



# THE BUSINESS CASE

## Risk Management

- Accountability
- Compliance
- Process improvement
- Consistency, fairness
- Organizational transition





# PERFORMANCE MANAGEMENT FRAMEWORK<sup>8</sup> WORKING DOCUMENTS

1. Strategic Plan
2. Job description
3. SWOT Analysis
4. Annual work plan
5. Annual performance evaluation



These documents inform workplan development for the year.

# ORGANIZATIONAL STRATEGIC PLAN

- **Vision:** a clear, concise statement of what your organization aspires to
- **Mission:** a clear, concise statement that informs your stakeholders of what you do and why you do it
- **Values:** a statement of the principles for how you will conduct your business when interacting with those you serve and work with
- **Goals:** the long term outcomes your organization aims to achieve
- **Objectives:** the steps that are needed to achieve your goals

The foundation of your organization – these 5 elements provide you with the direction necessary for the development of an organizational/departmental work plan.



# A job description

- # The job description

- 
- A word cloud with 'job description' as the central, largest term in a dark red font. Other prominent words include 'skills' in dark red, 'performance' in green, 'responsibility' in green, 'experience' in orange, and 'qualifications' in red. Smaller words scattered around include 'position', 'credentials', 'evaluation', 'communication skills', 'reports title', 'performance term', 'education', 'department', and 'attributes'. The words are arranged in a circular pattern around the central text.

# PM FRAMEWORK – SWOT ANALYSIS

The primary objective of a SWOT analysis is to provide you with a full picture of all the factors involved in determining strategic goals & objectives.

- ✓ Strengths: internal focus – i.e. what you have/do well
- ✓ Weaknesses: internal focus – i.e. budget, capacity
- ✓ Opportunities: external focus – i.e. growth, capacity bldg.
- ✓ Threats: internal & external focus – i.e. funding, politics



\*A SWOT analysis may be conducted at any given time for any given activity.

# PM FRAMEWORK – THE WORK PLAN

A work plan is a series of project plans that typically cover a 12 month period.

- A formal, organic document that may be revised as necessary according to environmental conditions
- Developed collaboratively with your leadership, direct report(s) and other stakeholders
- Goals & objectives must align with the organizational strategic plan
- Goals & objectives: are work related and includes capacity building

# 6 STEPS IN WORK PLAN DEVELOPMENT

1. Identify key goals & objectives: using the PM Framework tools.
2. Identify key activities - how will you put your plan into action? List major steps or milestones.
3. Roles/Responsibilities - who will be involved in the various stages of putting the plan into action? What is their specific role?
4. Resources required - resources required to put your plan into action - do you have a team? is your team representative? budget? facilities? Do you require support from other departments or stakeholders?
5. Timelines - when do you start and finish? Steps? Are your timelines realistic?
6. Outcomes - must be identified. How will you know if your project is a success? What measurable outcome indicates whether or not you met your goals and objectives?



# PM FRAMEWORK

## WORK PLAN GOALS & OBJECTIVES

### SMART:

- Specific
- Measurable
- Achievable
- Relevant
- Timely



# PM FRAMEWORK – PERFORMANCE EVALUATION

A critical communicating opportunity to provide feedback, recognize performance, good & bad, and to determine future work expectations.

A proactive tool that will assist in preventing future problems

Carried out at least once annually and as required

- ✓ Timely
- ✓ Two-way constructive feedback dialogue
- ✓ Meaningful – qualified
- ✓ Forward looking – non-punitive
- ✓ Must include **capacity building** as required



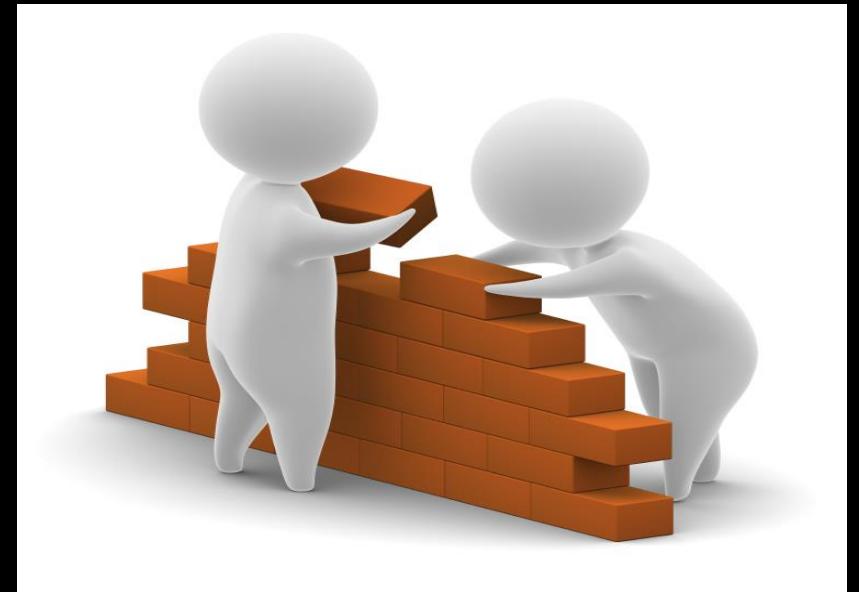
Outcomes form the basis of the work plan for the coming year

# THE WORK PLAN IS DONE – NOW WHAT?

The preparation is done – now the hard part begins!

- Implementing Performance Management
  - ✓ Monitoring
  - ✓ Evaluating
  - ✓ Acknowledgement
  - ✓ Documenting
  - ✓ Following up

Are you ready for the challenge?



# LEADERSHIP

Leadership – what does it mean to you?

It is the art of motivating a group of people to act towards achieving a common goal.

- Leadership is:
  - Motivational
  - Supportive
  - Accountable
  - Respectful
- Emotional Intelligence (EQ)
  - How well you manage your emotions & influence relationships around you
  - 5 core attributes: self-awareness, self-regulation, empathy, motivation & self-expression
  - It is the main driver of leadership - an acquired skill





# THE EFFECTIVE WORK RELATIONSHIP

A cornerstone - it is a psychological contract for “The way things work here.”

- Based on trust which you are primarily responsible for establishing through:
  - ✓ Communication
  - ✓ Integrity: walk the talk – follow through
  - ✓ Honesty: adversity is addressed directly
  - ✓ Compassion/Empathy & support
  - ✓ Creating a healthy work environment
  - ✓ Accountability vs. blame
  - ✓ Recognition & reward
  - ✓ Consistency



TRUST is earned, it's hard work but it will enhance performance!

# COMMUNICATING

- Speak directly
- Be self-aware
- Be accessible
- Active listening
- Document, follow-up and document



# PERFORMANCE MANAGEMENT – EMPLOYEE ENGAGEMENT

## Engaged employees

- ✓ good corporate citizens
- ✓ strong work ethic
- ✓ Initiators/problem solvers

## Disengaged employees

- entitled
- complacent
- absenteeism/presenteeism
- toxic

## Keeping your people engaged

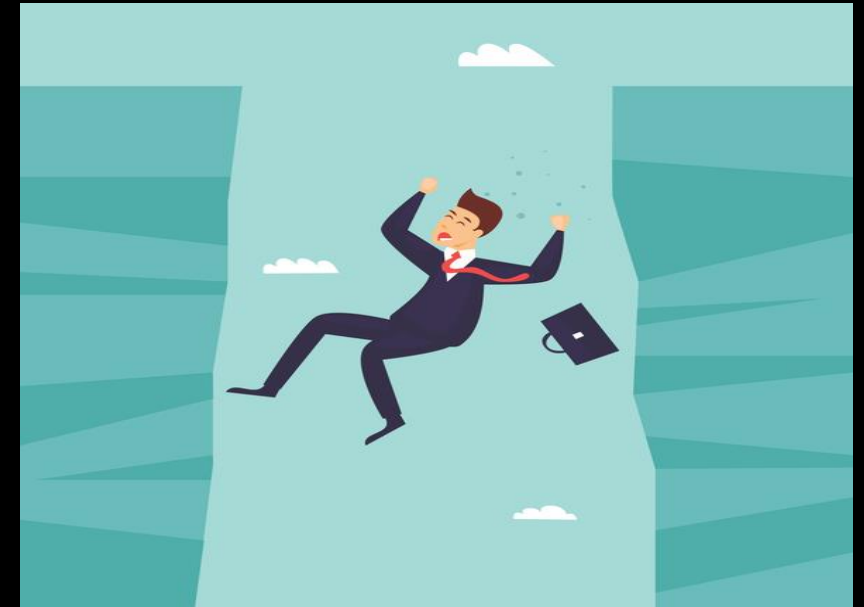
- ✓ trust - autonomy
- ✓ support
- ✓ recognition
- ✓ reward



# PERFORMANCE MANAGEMENT – OBSERVATION

Observation gives you first hand knowledge about performance - mbwa

- What to observe
  - ✓ soft skills – respect, ethics, attitude, timeliness, effort, initiative, consistency, conduct, safety, customer service, critical incidents
- Then what?
  - ✓ document (of course)
  - ✓ provide feedback
  - ✓ coach





# OBSERVATION – MENTAL HEALTH

Mental Health is increasingly becoming one of the costliest expenses in the workplace today.

- The duty to report to work
  - Employment agreement, personnel policy
- The duty to inquire
  - addictions
  - depression, anxiety
  - trauma
- Support
  - ✓ compassion/empathy
  - ✓ accommodation/leave
  - ✓ benefits: EAP, benefits, allowances



# COMPLIANCE - INTERNAL

- Personnel Policy

- ✓ recruitment
- ✓ performance management
- ✓ compensation
- ✓ work conditions
- ✓ leave
- ✓ conflict resolution\*
- ✓ discipline\*\*



# RESPECTFUL WORKPLACE

A critical component of effective performance management

- Respectful Workplace
  - harassment
  - discrimination
  - conduct
  - confidentiality
- Effects
  - morale
  - productivity
  - attraction & retention
  - liability
  - reputation



# COMPLIANCE - EXTERNAL

- Canada Labour Code
  - Employment Standards
  - Occupational Health & Safety
- Canadian Human Rights Act
- Charter of Rights and Freedoms
- Employment Equity Act





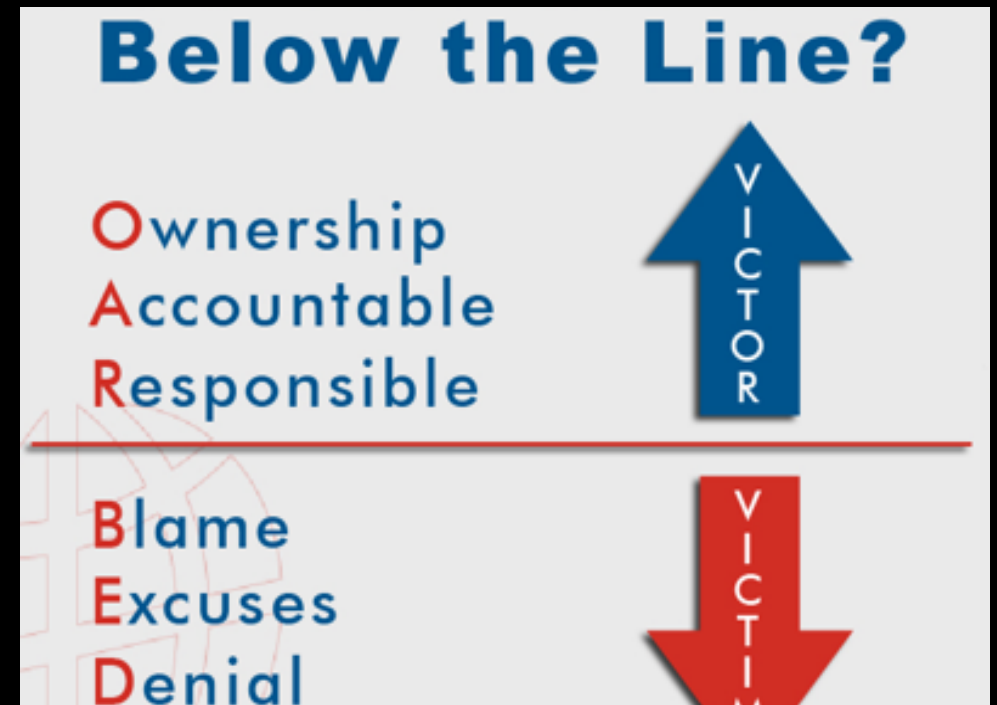
# ACCOUNTABILITY

What does accountability mean to you?

It is the obligation of an individual account for her/his activities, accept responsibility for them, and to disclose the results in a transparent manner.

Authority, autonomy = accountability for:

- actions
- decisions
- outcomes



# INSTILLING ACCOUNTABILITY

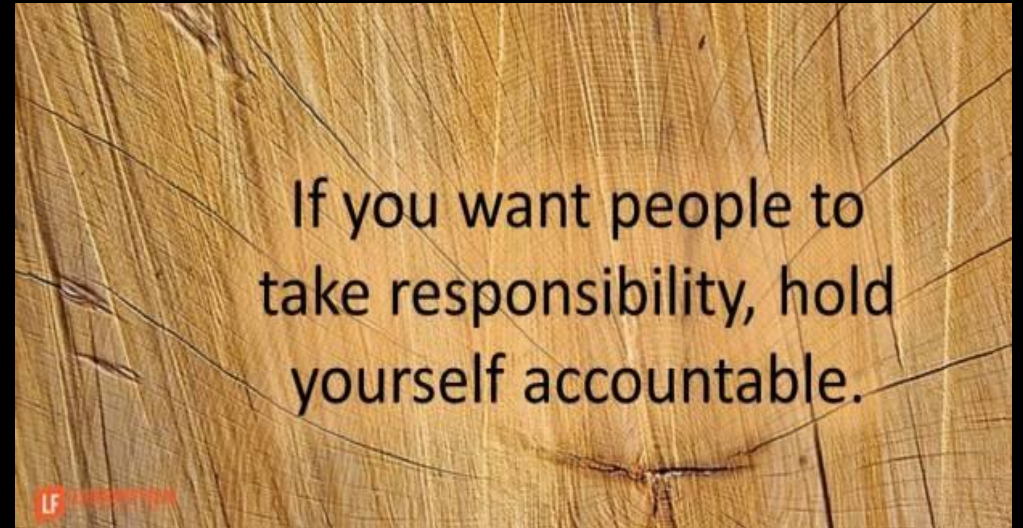
## 8 Steps to Accountability

- ✓ Drive for Results: clear expectations of outcomes & an adequate level of control
  - ✓ Honesty & Integrity: communicating directly and constructively
  - ✓ Trust: establish relationships
  - ✓ Clear Vision & Direction: limit uncertainty to stop “chasing the rabbit”
  - ✓ Problem Solving & Technical Expertise: Ensure your people have the skills to do what you ask of them effectively & efficiently
  - ✓ Communication: Communicate for understanding: inform, ask and listen
  - ✓ Flexibility: Facilitate change & how to adapt to it – change management
  - ✓ Collaboration vs Conflict: Encourage & facilitate teamwork
- 
- ❖ Allow your report(s) to make mistakes without placing blame – forward looking
  - ❖ Flaws must be addressed immediately

# ACCOUNTABILITY and YOU

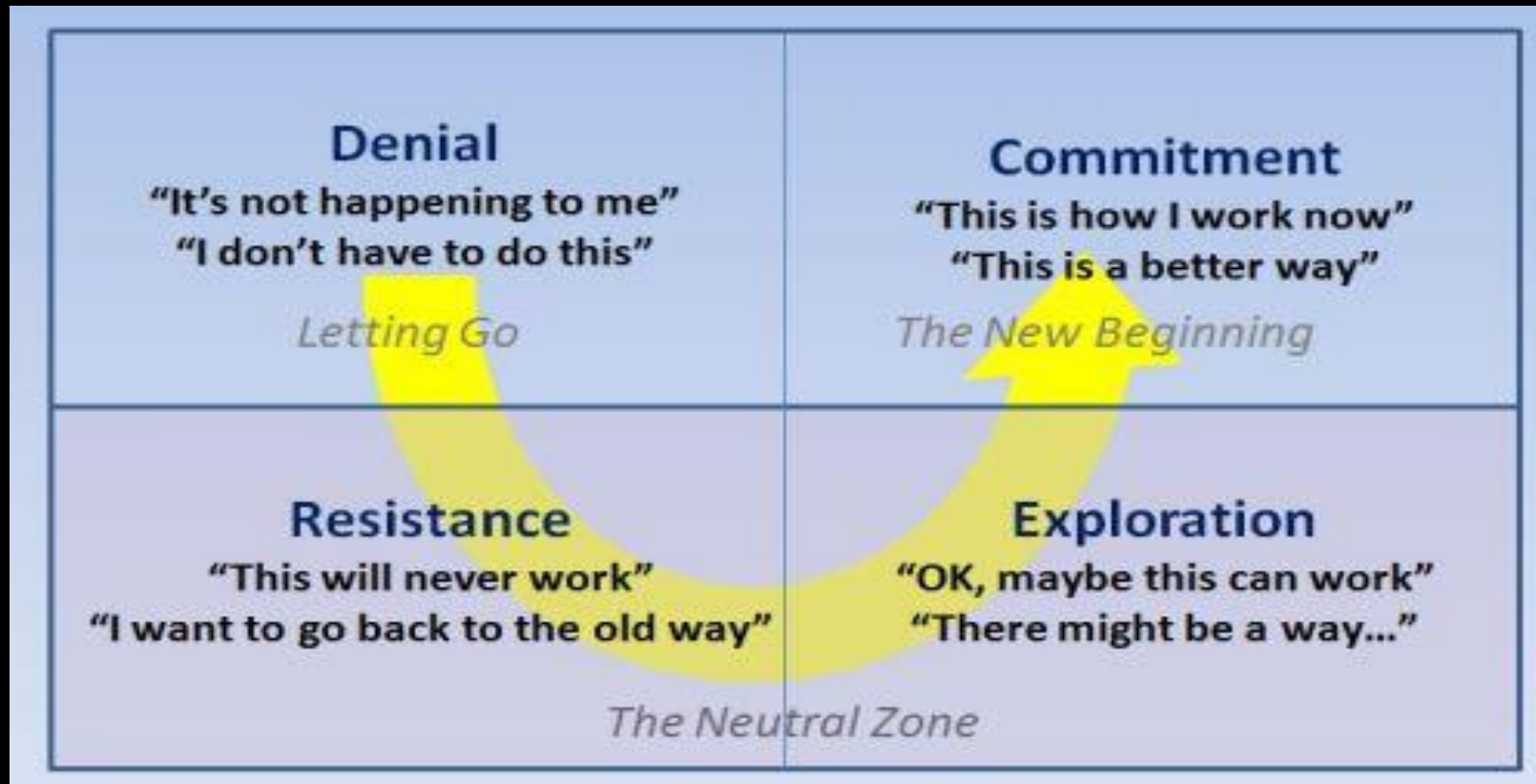
Personal Accountability: the capacity for taking ownership of and responsibility for:

- your actions
- processes, decisions, actions & results
- providing clear direction & expectations
- formal & informal communication
- coaching & constructive feedback



# WHERE WILL ALL THIS HARD WORK TAKE YOU?

## ORGANIZATIONAL TRANSFORMATION





# SUMMARY

- Takeaways
- Performance Management
  - ✓ Strategic plan, JD, SWOT Analysis, work plan
  - ✓ Monitor & evaluate
  - ✓ Communicate, provide feedback
  - ✓ Acknowledge, reward/discipline
  - ✓ Repeat
- Next Steps
  - Apply what you learned
  - How it affects your own performance evaluation
  - Follow-up with your supervisor





# GUNALCHISH - THANK YOU!

TWO EAGLES HR CONSULTING

[ROBINHENRYTLINGIT@GMAIL.COM](mailto:ROBINHENRYTLINGIT@GMAIL.COM)

TELEPHONE: 250-575-8180