

Health PEI

Employee Performance Development

Leadership Development
Workshop Series 2017

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What we don't want

- <https://www.youtube.com/watch?v=PI6yOlxYpLk> Tough Choice

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What Are Your Employee Performance Development Challenges?

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Why Employee Performance Development is Needed

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For Employees & HPEI

- More than 1/3 of employees indicated that they were not receiving feedback from their supervisors
 - ▶ Work Life Pulse Results:
- Burnout risk factors are a concern
 - ▶ *Leading Workplace Communities*
- Accreditation Canada requirement
 - ▶ Performance management isn't just a 'nice to have – it is an essential element for accredited health care



Benefits of Employee Performance Development

- Define and review job functions, expectations, and goals
- Determine training needs
- Give employees awareness of what your reference would be
- Review compliance with health, safety, and other priority areas
- Identify areas that need improvement and what needs to be done
- Acknowledge and affirm the value employees contribute to the team

Better data back up a shift in emphasis from backward-looking evaluations to fact-based performance and development discussions, which are becoming frequent and as-needed rather than annual events

Research Says...

- Organizations that invest in ongoing performance management improve revenue, retention, and customer satisfaction.
 - Brandon Hall Group, [2014 Performance Management Study](#)
- Improved data on performance indicates that performance development (future lens) is more important than performance appraisal (history lens) with more frequent discussions on an as-needed basis rather than annual events
- Annual target is the bare minimum, not the target

Not Just For Poor Performers

- Stars need to know that they are seen and appreciated, or they will fade away or go away
- Employees with potential for growth benefit from encouragement and support to think about what they could do next
- Acceptable employees need to know that if you are investing this time in them, that you must also be investing time in everyone.

Give employees every chance to succeed

- By ensuring unsatisfactory employees understand
 - ▶ Health PEI/Your expectations
 - ▶ They are not yet meeting expectations
 - ▶ There are supports to help them meet expectations
 - ▶ They need to meet those basic expectations soon



Health PEI's Employee Performance Development Policy



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Employee Performance Development

What: A strategically integrated means of sustaining HPEI's success through improving people performance

Why: HPEI's effectiveness is a function of **individual performance *and* management**

How: Performance development is a **shared responsibility** grounded in HPEI's culture of continuous improvement



Learning Through Feedback Model



Learning Through Feedback must be:

Organizationally supported; manager facilitated; and employee driven



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Employee Performance Development Policy

- Value to organization [Sec 1]
- Purpose of performance development [Sec 2]
 - ▶ Align work with strategic direction
 - ▶ Provide continuous learning opportunities
 - ▶ Establish learning and development plans
 - ▶ Engage in leadership development and succession planning
 - ▶ Reinforce fundamental value of communication
 - ▶ Provide meaningful review and feedback
- Application of policy [Sec 3]
- Process – not an event [Sec 4]

Policy Points of Interest

- 6.4 : 3 months for development of learning/development plan for new supervisors
- 6.6: manager responsibility
- 7.1: annual or biannual for large spans of control
- 7.6: probation period assessments
- **7.7: trial period assessments**
- 7.8: to be sent to HR for filing

New





10 PERFORMANCE REVIEW TIPS YOU'RE PROBABLY NEGLECTING

1 COME PREPARED



Have key questions ready during the review.

2 DO A PEER REVIEW



Ask questions BEFORE the review (to peers and other managers).

3 SELF EVALUATION



Ask what the employee thought of the year.

4 LISTEN



Don't talk too much, listen to your employees.

5 DON'T DO THE FEEDBACK SANDWICH



Be transparent with your employees.

6 PRAISE ACCOMPLISHMENTS



Remember to praise accomplishments.

7 PAY ATTENTION



Show your employees the respect they deserve.

8 STICK TO THE DATE



Don't postpone the review.

9 KEEP IT POSITIVE



Avoid using the review as a venting session.

10 HAVE A QUICK FEEDBACK LOOP



Don't wait for the review to give all the feedback.

Nutrition Break



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Health PEI's Policy & Documenting Tools

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Tools Are Guides

- The conversation is your work, performance tools can help ensure
 - ▶ Your conversation covers key points
 - ▶ Your conversation is adequately documented
- Different tools are available for different situations: the high performer, the high potential employee, the marginal performer, managers, and basic check-ins

Choosing the Tool

- Performance Development Policy Appendices:
 - ▶ Appendix A: Preparation Checklist (this is just a starting point, you will want to include position specific points, as well as touch on attendance, safety practices, and any other policy issue or concern that may be at play on your team)
 - ▶ Appendix B: Learning and Development Plan
 - ▶ Appendix C: Performance Improvement Plan
 - ▶ Appendix F: LEADS
 - ▶ Appendix G: Probation Period Assessment
 - ▶ Appendix H: Trial Period Assessment
- Other options



Appendix A: Preparation Checklist

- This is just a starting point, consider
 - ▶ Including position-specific points,
 - ▶ Addressing
 - attendance,
 - safety practices, and a
 - any other policy issue or practice you've been working concern that may be at play on your team



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Appendix B: Learning and Development Plan

- Learning and Development Goals (1-3)
- Support required
- Workplan
- Progress
- Accomplishments from last year
- Comments



Appendix C: Performance Improvement Plan

- Outlines performance improvement required when overall performance does not meet minimum expectations
 - ▶ This could include employees failing to follow safe work practices (TLR, SMART, compliance with policies, etc.)
 - ▶ Job responsibilities and specific improvements
 - ▶ Required competencies and specific improvements
 - ▶ Performance Improvement Plan
 - Actions, activities, milestones, check-ins
 - Supports needed/to be provided by supervisor
 - ▶ Follow-up Review must be scheduled in near future (eg 60-120 days)

Appendix F: LEADS Tool for Middle, Senior and Executive Leadership

- Leads self
- Engages others
- Achieves goals
- Develops coalitions
- Systems transformation



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Appendices G & H

- For probation and trial period assessments
 - ▶ UPSE Health Agreement
 - ▶ Note also PEINU Article 18.4
 - Requirement for casual and temp employees to receive a performance appraisal on completion of 975 hours



Other Tools

- Managers have discretion to use other performance documentation tools, so long as they are in keeping with the values of the policy (such as supportive, developmental, non-disciplinary)
 - ▶ PSC inspired Development, Succeeding, Mastering (DSM) form: another great option, especially for front-line employees who have mostly task-oriented responsibilities
 - ▶ Self-reflection
 - ▶ Free –Form Document



Why We Need To Document Performance Development Discussions

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Why Document?

- Accountability for having the performance conversations
 - ▶ For Managers
 - ▶ For Employees
- Clearly identifies that the conversation is about performance
- Gives manager and employee opportunity to reflect on how things are going and encourages thinking about possibilities
- Evidence for accreditation, and for future discussions
- Preservation of history



Documentation Sets Benchmark and Future Direction

- Development is Forward Looking
- Even when getting into the challenging areas, keep the vocabulary and direction of discussion in the positive –
 - ▶ how things can be improved,
 - ▶ what the employee can do to make a difference,
 - ▶ how one skill can be strengthened
 - ▶ (not about what's wrong, whose fault, or identifying weaknesses)



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How To Hold Performance Development Discussions

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Appendix D: Manager Guidelines

- How to Use the Tools and Have the Conversation
 - ▶ Preparing for the Discussion
 - ▶ Leading the Discussion
 - ▶ Joint Assessment
 - ▶ Developing Recommendations



Preparing for the Performance Discussion

- No surprises
 - ▶ Book the meeting in advance
 - ▶ Provide an agenda (Self-Reflection is a good basis)
- Self-Reflection Tool
- Prepare for the meeting by
 - ▶ Reviewing the job description or PQ
 - ▶ Parking your own emotions and pre-judgments
 - ▶ Focusing on facts and desired outcome
- Create an agenda and review your notes before the meeting



Setting Up the Performance Discussion

- Choose a neutral and private location
- Don't let anything intrude once the meeting has started.
- Try to put the employee at ease by opening with some easy ice breakers, offering a coffee, tea, or water
- Open with an opportunity for the employee to speak about how things are going



The Basics of Discussing Employee Performance Development

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Process for Discussion

- Using the agenda (referring to job description accountabilities) stimulate discussion with open-ended questions:
 - ▶ How do you think things are going?
 - ▶ “Could you give me some details on ?” or
 - ▶ “In your opinion what is the best way ?”
- Mutually develop goals that are measurable and observable
- **Tie these goals in with organizational goals and personal value to the employee.**
- Close the interview by summarizing the major points of discussion and giving the employee a chance to make any additional comments verbally or written on the form if desired.



Tips for Development Plan

- Set SMART goals (specific, measureable, achievable, relevant, timely)
- Determine priorities
- Discuss supportive check-ins
- **The Employee now has an action plan**



Development is for Everyone

- This is an activity that is meant to benefit everyone (not just those who are struggling).
- Development activities may include creating a buddy system, asking a high performer to mentor a new member of the team, having team members take turns doing a mini-presentation to the team
- Share the responsibility
 - ▶ Empower employees to ask you about how they are doing
 - ▶ Ask employees to do mid-course report on their progress, efforts, initiatives



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Easy to Note in PeopleSoft

- Employee Data



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Not just A Once-A-Year Talk

- Performance development is on-going, and includes coaching, mentoring and dialogue.
- Effective feedback is key.
- Regular interactions with your team and individual members is the prime opportunity to promote performance development:
 - ▶ Brief regular check-ins
 - ▶ Walk around management
 - ▶ Ask questions
 - ▶ Acknowledge accomplishments.
- **Send the document to HR**



What HR Does

- The completion of PDPs is noted on PeopleSoft record
 - ▶ Directors and ELT generate reports re where these conversations are happening
 - ▶ Accreditation process looks at these stats
- Document is filed on personnel file
- Performance documents are permanent
 - ▶ No sunset clause

Addressing Your Challenges



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Wrapping Up



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Performance Matters

- Process tools
- Conversation tools
 - ▶ Use them – they get better with practice
 - ▶ Practice with a peer
- Preserve a record for tracking progress and transferring information to future supervisors

