



Performance Management and Development Planning

Guidelines for Employees



Why Do We Need Performance Management and Development Plans?

The simple answer is that we do this to satisfy the needs of an employee and their manager. These people in turn satisfy the needs of the company and its clients.

We are committed to helping everyone deliver their best performance and have the opportunity to reach their full potential. It takes two people to make the performance management process work: the manager and the employee, both working on improving the performance of the employee, the manager and the company overall.

The following simple guidelines describe what the employee and to a lesser extent the manager need to do to make the performance management and development planning process work.

As an employee you will have need that your manager must fulfil for you.

We believe that as an employee that you have 7 fundamental needs and they correspond with 7 behaviours that your manager must exhibit in order for you to succeed. If you feel that your manager is not exhibiting these behaviours towards you then please bring this up in your discussions with them.

As the Employee	As the Manager
1. Tell me what is expected of me.	1. In order to do tell you what is expected I need to organise, plan and agree objectives, job purpose, measures and targets.
2. Give me the opportunity to perform.	2. I need to delegate and clarify standards, with you and agree measures & how often we will review progress.
3. Tell me how I am getting on.	3. I will need to have regular informal reviews with you to see how things are progressing.
4. Give me support and guidance to improve.	4. I will need to devote some time to you in order to identify and satisfy training and development needs, or give you coaching, mentoring and support.
5. Tell me how I have performed overall and recognise my contribution and achievements.	5. I will at least once during the year deliver a performance appraisal and salary review. I will also have a career development discussion. I will try my best to motivate you and will say thank you sometimes publicly sometimes privately.
6. Ask me how I think I can improve and how I think the company can improve	6. I will listen to you.
7. If my suggestions are good, then act on them and tell me that you have.	7. I will act upon any good suggestions and give you feedback on them.



Setting Objectives

“Tell me what is expected of me”

It is important that you understand what is expected from you by your manager and by the company. It is your manager's responsibility to be clear about this. You can help the process as follows:

- Review the statement of what is required from you this year:
Make sure that you understand what it means.
- The statement may be in the form of
 1. A list of specific objectives,
 2. Responsibilities in conjunction with your job profile,
 3. Terms of reference for a project
 4. A specific numerical target.
- One of your objectives will be to improve your performance. Discuss with your manager how he or she can help you to do this.
- For example, you may agree that an informal review of performance every quarter would help you.
- Discuss the criteria for measuring your achievement against these objectives, so that you know what the manager is looking for and how you will both know when it has been achieved.
- For example, the objective may be to produce a report by a specific date, or it may be to agree and implement the recommendations in the report by a certain date.
- Discuss how your objectives relate to the department/team/contract objectives and to company objectives.

For managers, your objectives should include an objective to manage the performance of your own staff effectively. This may be worded:

“Manage the performance of individuals who report to you effectively. See that each individual has:

- a statement of outputs required
- regular progress meetings
- formal performance assessment at agreed intervals (@ least 1/Yr)
- clear and agreed training and development actions which you and the individual both commit to take.”



Delegating, clarifying standards, agreeing measures & review periods

“Give me the opportunity to perform”

- In addition to understanding what your job/objectives are, there must be a discussion with your manager to clarify and agree how you are expected to do your job, how success will be measured and how often you will review progress

It is not good enough for your manager to just list a number of objectives. You will need to know how the measures which will be applied.

For example:

- How should it be done (Does the manager care?)
- By when should what be completed?
- What are the % incomes or % improvements expected?
- How often will progress be reviewed (milestones etc)

- Qualify any standards of behaviour which are discussed in an objective and definitive way. It is no good your manager describing behaviours as: -
“be more appropriate” or “make sharp presentations”

- In addition to job objectives please also discuss any developmental objectives which will be to help you improve your performance, particularly if you are not yet fully proficient in the job.

Reviewing Progress

“Tell me how I am getting on”

You should expect to receive feedback on your performance from your manager; if you do receive any then ask for it. Feedback should be the basis of ongoing discussions between you and your manager not just at the annual appraisal.

- Ask for feedback on things you have done from your manager at progress sessions.
- In discussing this, draw out the lessons from events, from what has gone well and what could have gone better.
- Use the feedback to help you in the future – and apply the lessons from specific events the next time you perform a task. This is the key to developing your performance.



Developing Performance

“What do I need to do to improve my performance?”

The purpose of a performance management process is to help you to improve your performance. Your manager should provide support to you. Support is also available from elsewhere in the company. Try asking others for help. Ultimately, it's up to you.

No-one's performance is ever perfect, and there are always opportunities to develop your skills and to improve your performance.

To help you:

- Your manager should be able to define what skills and knowledge is needed to help you to do your job better and the behaviours you need to develop.
- You and your manager should then agree what specific actions you can take to acquire or develop these skills and knowledge. For example, on-the-job training, coaching, self-development.
- You should write down these actions, no matter how briefly, as your Development Plan.
- Make it part of your objectives for the next year to take action to develop your skills and improve your performance.
- Think about this development in terms of your career aspirations and discuss this with your manager. Improvements in performance are not an automatic route to promotion, but they very rarely prevent it.

Appraising Performance

“How have I performed overall?”

Every individual should expect to receive a formal performance appraisal at regular intervals – at least once a year. If you haven’t had one – ask. You are expected to contribute to this through a self-appraisal. To assist the process, individuals should:

- Prepare a self-appraisal, using the outline suggested by your manager. Look back over the year, to review what you have done, what you think went well and what could have gone better.
- Ask yourself: What could you have done differently?
What additional things could your manager have done which would have helped?
What could the Company have done?
- Think about your personal and career objectives;
What do you want to be doing in two years time at work?
What about in five years time?
- Meet with your Manager to discuss your self-appraisal and his or her appraisal; listen to the feedback provided and ask questions if it is not clear.
This process is designed to help you.
- Your Manager will then give you a written copy of your appraisal for your comments and signature. Your Manager’s Manager will approve your appraisal.

There are various ways in which the organisation rewards performance: financial rewards, in terms of salary or bonus, opportunities for development by taking on new responsibilities or moving to a new area; recognition and praise. It is important that you understand the basis on which your performance is being rewarded; if you don’t, ask your manager. It is his or her responsibility to explain this to you.

Rewarding

“How has my performance been rewarded?”

There are various ways in which the organization rewards performance: financial rewards, in terms of salary opportunities for development by taking on new responsibilities or moving to a new area; recognition and praise. It is important that you understand the basis on which your performance is being rewarded. If you don’t understand then ask your manager. It is his or her responsibility to explain this to you.



Ask Me!

“How can I improve & how do I think that the company can improve?”

Your manager should always be open to suggestions from you about how to improve your performance, the company's performance and maybe even their own...

Always seek out your manager when you have ideas and suggestions that you think will improve any of the above. Be especially prepared at the time of your appraisal and development plan meeting with your manager.

If you do wish to be viewed more positively by your manager then if you do find issues in your workplace then give them some of your own thought first and be prepared to offer possible solutions when you bring the issues to the attention of your manager.