

DCIF Project – Performance Management Tool 1: Understanding Performance Management

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Tags

Who is this for?

High Priority:

- Direct Line managers

Practical Information:

- DEI and HR Professionals

What guidance does it provide?

- Understanding the building blocks of what inclusive performance management looks like
- Understanding key considerations for performance management policies

Take home points

- Remember, managing performance is not an “add on” to other responsibilities of as an employer. In fact, it is an essential part of your role. The performance management process requires diligent planning to ensure it is rooted in collaboration and leads to effective implementation.
- A worker’s performance management plan should not be set after workplace behaviours need adjusting or accomplishments are achieved. It must be planned and communicated during the onboarding phase.
- For effective communication, ensure you are:
 - Transparent about what is involved in the performance management plan
 - Provide alternative forms of communication and information to make communication between employer and employee clear
 - Stay flexible and open to suggestions from the employee

What is Performance Management?

Performance management refers to a process of creating a work environment where people can perform to meet your business goals.¹ Effective **performance management** addresses three key areas:

1. Developing employee's skills and abilities
2. Rewarding employees
3. Driving your company's performance

Managing Performance in an Inclusive Way

Inclusive **performance management** speaks to an overall approach that sets the tone around the values and expectations within your business. This involves:¹

- Ensuring that the expectations for each employee's role are clearly communicated
- Assessing each employee's performance specific to their contributions to your business, as opposed to personal biases or assumptions
- Training managers or supervisors to spot their own bias
- Reinforcing inclusive behaviours at all levels of your business
- Actively seeking feedback around your evaluation process, what constitutes good performance, and if your employees feel supported to be successful at work.

Performance management of people with disabilities is not more difficult or really that different from the supervision of a worker without a disability.

This is because workers with a disability must meet the same standards and requirements as others when it comes to job expectations, productivity, delays, conflicts, safety, and more. Despite this, managers must understand that workers cannot all be supervised in the same way. Managers must be able to adapt how they supervise each worker, to best meet the needs of the individual, support their participation in the workplace, and help them achieve career growth.

Under the coming ACA standards, organizations will be required to develop policies on improving practices for retention and development of employees with disabilities. Unions can assist with the realistic development of these policies, as well as with maintaining accountability within the organization.

How do I begin?

Remember, managing performance is not an "add on" to other responsibilities of as an employer. In fact, it is an essential part of your role. The performance management process requires diligent planning to ensure it is rooted in collaboration and leads to effective implementation.

Performance Management Across the Employee Life Cycle

Skills for Care have created a useful framework to guide **performance management** processes and conversations:²



- **Onboarding:** The process of familiarization with the workplace and settling into the job

- **Goal Setting:** Setting workers' objectives via collaborative, ongoing conversations; timely recognition of performance; informal dialogue on a weekly basis; and quarterly progress reviews with accountability and incentives
- **Supervision:** Meetings where duties, tasks, accommodations, and responsibilities personal to the worker and their role are discussed
- **Learning and Development:** The process of acquiring skills or knowledge by coaching, formal and informal learning interventions, education, or planned experience
- **Appraisal:** Setting and reviewing objectives or work plans and personal development plans
- **Departure:** When workers part with an organization, including those who resign or retire

It Starts at Onboarding

A worker's **performance management** plan should not be set after workplace behaviours need adjusting or accomplishments are achieved. It must be planned and communicated during the onboarding phase. It is a good practice to renew the plan after each evaluation. During the onboarding period, have a focused discussion on the follow areas to ensure your worker understands performance expectations:

- Clarification of **bona fide requirements** for the job
- Communication of expectations
- Setting performance goals
- Setting professional developmental goals

The Importance of Ongoing Management

Once a performance plan is set in motion, a manager's responsibility over **performance management** is more than just an annual appraisal. It is an ongoing process that includes:

- ✓ Setting clear and realistic goals, objective, and targets alongside the worker
- ✓ Coaching and developing employees over time
- ✓ Providing regular informal feedback
- ✓ Recognizing and rewarding good performance
- ✓ Developing action plans to improve performance where necessary
- ✓ Considering long-term career development
- ✓ Identifying training and development needs and how they should be met
- ✓ Formally evaluating performance (at appraisals)

Try These Tips for Effective Conversations

1. Transparency:³

- Be transparent about what is involved in the **performance management** plan. The goal is not to ambush the worker about their mistakes or weaknesses but provide opportunities for discussion on how to improve.
- Help workers understand how the conversation will be structured so that they can mentally prepare for and engage in meaningful discussion.
- Provide a copy of the performance appraisal template to support thorough comprehension of what is being asked, graded, and received.

2. Clarity:

- To successfully achieve performance goals, communication between the acting manager and worker must be clear.
- Provide alternative forms of communication and information (e.g., written, or large text, Braille materials, audio, sign language, or plain language).

- For example, the performance of the branch manager is assessed by how well their branch performs. Every employee has individual quotas to meet. To help ensure effective communication between a worker and employer, conversations should revolve around standards and objectives instead of observations based on capability.
- Some people with disabilities communicate in different ways, for more information, please visit [Communication Tool 2 - Understanding Disability Etiquette](#)

3. Simplicity:⁴

- Stay flexible and open to suggestions from the employee; many persons with disability knows better than anyone what their strengths and limitations are; it is important to discuss directly with your employee.
- When an employee is ready to share what further supports can help benefit them, then engage with that dialogue.
- And most importantly, allow employees to ask questions. The more understanding of what is expected is present, the process of review management is made simpler!

Together Everyone Achieves More

“Helping our employees learn, grow and develop enables them to pursue meaningful careers and, in effect, be their best selves. That’s why we work hard to foster a culture of continuous learning throughout RBC. Learning isn’t a side-of-desk task for us — it’s an essential part of what we do every day.” - Alan Richardson, RBC Senior Executive

Each employer will develop their own **performance management** process differently - the way that they approach conversations, appraisals, measures of performance, and more. No matter the approach, to lead an accessible and inclusive **performance management** process, managers need to involve all workers, including those with disabilities, from the beginning.

- **Place your focus on supporting the worker.** Yes, **performance management** processes are rooted in a business perspective – how the worker can be more productive and support the organization’s goals. However, when a manager interprets the **performance management** process as a means to evaluate what a worker can or cannot achieve, it severely limits their skill development and potential to contribute to your business’s success.
- **Be open and understanding.** Collaboration between the employer and employee with a disability during **performance management** is rooted in open dialogue. If both parties communicate openly, with respect and understanding, each will benefit from their experiences.
- **Prioritize consistent communication.** Ongoing feedback helps workers grow their confidence, build skills, and is a best practice deeply rooted in accessibility. By engaging in collaborative conversations, employers identify and work with an employee address any barriers they may face. Not only will the worker have access to the tools and resources they need to thrive on the job, but the business benefits as well.

Pop Up: While disability confident leaders have the knowledge to support employees with disabilities in most instances, they also recognize that they may not have all the answers. They are committed to learning with and from people with disabilities.

Thanks to the efforts of disability rights activists for over 35 years in the trade union movement, sectors with the higher unionization rates tend to have better rates for hiring and retention of workers with disabilities.

References

¹The Canadian Association for Supported Employment (n.d.). HR Inclusive Policy Toolkit: Performance Management. <https://supportedemployment.ca/hrtoolkit/performance-management/>

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³Worktopia (2021). Success in the Workplace: Employer Toolkit. <https://worktopia.ca/wp-content/uploads/2021/03/Easy-Print-Version-Reduced-File-Size-for-Website-compressed.pdf>

⁴Supported Employment (2021). HR Inclusive Policy Toolkit. https://supportedemployment.ca/wp-content/uploads/2021/03/HR-Inclusive-Policies-EN-CASE-2021_web.pdf