

DCIF Project – Managing Performance

Tool 2: Preparing for 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?

- How to communicate with workers and set clear performance goals so there is an unbiased standard by which to evaluate performance rather than using observations of capabilities
- How to set targets, goals, and objectives, and decide when it may be reasonable to adjust these workers

Take home points:

- A worker's performance can hinge upon their working conditions. Disability confident managers cultivate habits like curiosity over judgement, when developing their own understanding of how people work best.
- Part of the new worker's onboarding should discuss the probation period and set objectives which, if met, will lead to the worker successfully completing their probationary period. This period is not only for the employer to review the employee's performance and behaviour, but also for the worker to:
 - Become familiar with the organization, its working mechanisms, and workplace culture
 - Develop an effective working relationship with fellow team members
 - Demonstrate their competency in the role
- When preparing for the performance management process, ensure you establish standards, make workers aware of standards, and monitor and measure compliance

Preparing for Accessible and Inclusive Performance Management

The way you manage performance has a significant impact on the productivity and wellbeing of your workers, as well as the quality of the products and services your workers deliver to your client base.

How you carry yourself and the choices you make when you recruit, lead, and manage your workers over time will make an important difference in how they feel about their job and their ability meet expectations and company standards. Your leadership will also set the tone and help to create conditions for a positive workplace culture.

Disability confident managers understand how a barrier-free environment can be instrumental in supporting the performance and engagement of workers with disabilities.

Identifying Conditions for Quality Performance

A worker's performance can hinge upon their working conditions. Disability confident managers cultivate habits like curiosity over judgement, when developing their own understanding of how people work best.

All workers, including people with disabilities, perform best in an inclusive environment where feedback and dialogue are conveyed in positive, constructive, and professional ways.¹ When communication is frequent, and both the manager and the worker engage in active listening to better understand one another, there is recognition of, and respect for inclusion and diversity. To prepare for a worker's arrival, managers should:

- Ask new workers during onboarding about what they need in their environment to support their success
- Identify a worker's learning styles and needs
- Routinely check in with workers to understand if conditions for quality performance are set in place

Workers with disabilities have a 76% rate of successful employment within unionized environments in the federal public sector compared to that in the private federally regulated sector, who are employed by 34%. We can see from looking at the private and public sectors within Canada, that workers with disabilities are more than twice as likely to find work in unionized environment as they are in non-union workplaces.

Navigating the Probationary Period

Probationary periods are structured to allow you to assess and review the new worker's performance, capability, training and development needs, and suitability for the role. Probationary periods tend to last anywhere from three to six months depending on the specific role – no matter the length, it should be for a fixed period that is mutually agreed upon when a candidate is hired. After this period, the employer and the worker collectively determine whether the decisions to offer and accept a job were appropriate.

Part of the new worker's onboarding should discuss the probation period and set objectives which, if met, will lead to the worker successfully completing their probationary period. Discussions and agreement on probation plans should take place shortly after the individual has started probation, to set

out clear objectives for the **probation period** and allow to for accommodations, if not implemented already.

Probationary periods should be structured to allow you to assess and review the new employee’s performance, capability, training and development needs, and suitability for the role. This period is not only for the employer to review the employee’s performance and behaviour, but also for the worker to:¹

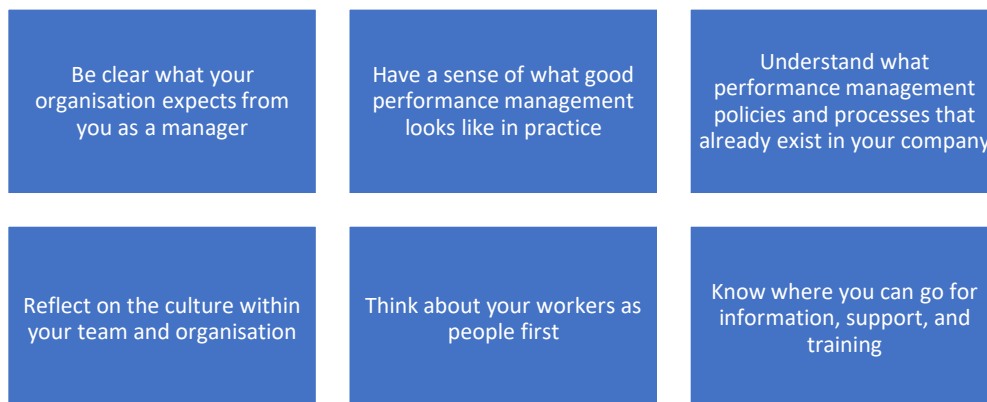
- Become familiar with the organization, its working mechanisms, and workplace culture
- Develop an effective working relationship with fellow team members
- Demonstrate their competency in the role

*Do’s and Don’ts of Performance Management During **Probation***

Do’s	Don’ts
<ul style="list-style-type: none"> • Set up performance meetings once every month with the new worker to discuss their role and provide feedback on their performance • Regularly monitor the new employee’s performance and document the discussions at progress meetings • Identify and address any problems as soon as possible • Provide constructive feedback, support, and guidance in a respectful manner • Provide any necessary training and coaching 	<ul style="list-style-type: none"> • Cancel, postpone, or delay performance meetings • Use negative or accusatory language, (i.e., ‘your weaknesses’ or ‘failures’ but rather explain what or where the employee has gone wrong and what they need to do in future) • Assume that if targets are missed or performance has fallen short, it was due to the workers disability • Neglect to ask the worker what supports they may need • Remain passive or responsive, rather than proactive, when it comes to barrier removal

Clarifying Expectations and Performance Standards¹

Before diving into the performance management process, managers must review and consider the following principles:



With these in mind, establish expectations and performance standards that map onto the bona fide requirements of the job (i.e., the specific tasks or assignments that an employee must perform, and methods to evaluate performance). The following are some quick tips:

- A worker with a disability must meet the same standards, whether quantitative or qualitative, as other worker in the same job
- Lowering or changing a performance standard because a worker cannot meet it due to a disability is not required as a duty to accommodate in the workplace
- As much as possible, an employer should evaluate the job performance of a worker with a disability the same way it evaluates any other worker’s performance
- A supervisor may not require that a worker with a disability perform a job in the same manner as a worker without a disability – in many instances, an essential requirement of the job can be performed in different ways, such as with accommodations

Example: One of Skylar’s core job requirements is to deliver training modules. Skylar is Deaf and communicates through **American Sign Language (ASL)**. When presenting, an **ASL** interpreter voices for Skylar. Skylar’s manager typically assesses workers based on how they deliver the presentation – for example, enthusiasm, charisma, and ability to inspire learners, etc. However, it is unfair to evaluate Skylar’s training based on how an **ASL** Interpreter presents Skylar’s material. There are many alternative ways to measure Skylar’s job performance. Their manager can deploy a survey to examine whether learners felt engaged during Skylar’s training, or evaluate how Skylar uses their facial expressions, their word choice, and more.

Here are some promising practices to keep in mind when preparing for the performance management process:

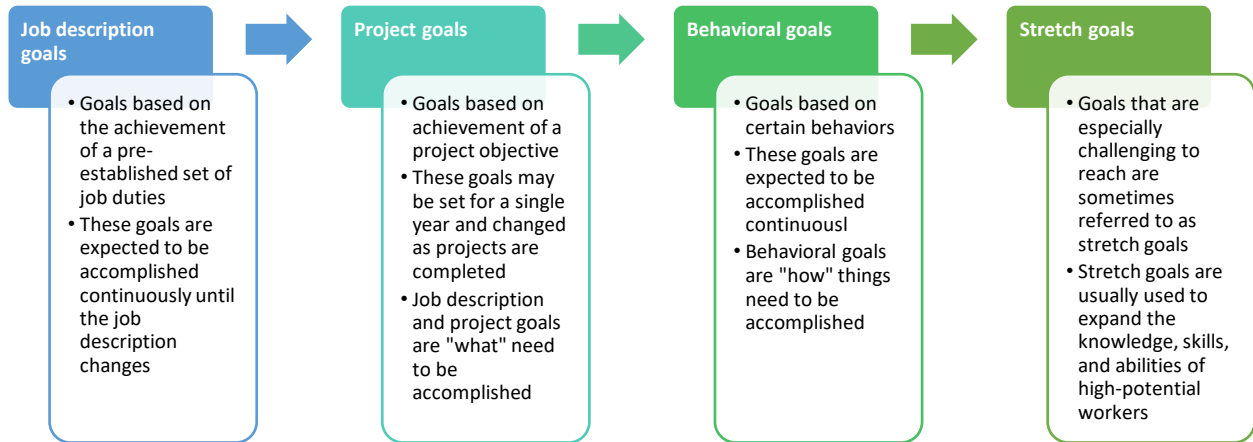
Establish Standards	Make Workers Aware of Standards	Monitor and Measure Compliance
<ul style="list-style-type: none"> • Determine performance standards that are related to all job roles, activities, and objectives • Create a checklist or compile standard operating procedures that define steps and sequences for all job roles, activities, and objectives 	<ul style="list-style-type: none"> • Communicate standards to workers so they understand what they are aiming for • Share the checklist with workers • Routinely meet to discuss and update the checklist • Give workers the space and opportunity to ask questions about how they can improve 	<ul style="list-style-type: none"> • Assess each worker's performance based upon the agreed upon standards • Ensure your evaluation is specific to their contributions in correlation to the checklist of their job role, activities, and objectives, and not personal limitations

Setting Goals Together

A worker’s goals are at the heart of successful performance management, and help workers align themselves with the organization’s overall mission. It can also help workers see how their contributions fit into the big picture and understand the value that they bring to the company.

Goals provide direction and guidance for a worker’s efforts, motivate their performance, and improve performance evaluation and strategic planning.

1. **Involve workers in the development of objectives:** Goal setting should not be completed by a manager alone. Discussion and collaboration can help a worker develop a clearer understanding of what is required of them, and also give them to chance to articulate what barriers they could face, and the supports they may require to meet specific goals. Take a look at these common types of goals:³



2. **Make sure goals are S.M.A.R.T⁴:** When goals are ambiguous or hard to measure, managers will face challenges with identifying performance expectations. Any progress a worker makes towards goals will also be a poor indication of performance – making it difficult to have meaningful performance management discussions. If an organization does not clearly identify its expectations, employees are left in the dark of what to do next. S.M.A.R.T. goals stand for specific, measurable, achievable, relevant, and time-based:⁴

Specific

- The goal should clearly state what is to be accomplished. Use specific action verbs, clarify the result, and indicate how it will be achieved/observed

Measurable

- The goal should be measurable in some way to describe the desired results. How will you know when the goal is achieved or not? Time/Quality measure? Budget measure?

Achievable/Attainable

- The goal should be challenging, yet within employee's area of control and responsibility.

Relevant

- The goal should be relevant to the needs of the university and the department. It should be relevant to the employee's experience, skills, and abilities.

Time-Based

- The goal should be accomplished within a defined time period. Deadlines and milestones are important and should be driven by the position's needs.

3. **Format each goal based upon standardized criteria:** Although each worker will have an individualized performance management plan and objectives, the formatting of all workers' goals should follow these standard criteria:
 - a. Focus on the specific outcomes and accomplishments that reflect the priorities of the role
 - b. Align with the overarching company's missions and goals to add value

- c. Include specific measures such as expected quality, timelines in completion, or other specific performance results that are used to assess your performance objectively through the evaluation period
 - d. Include a range of performance levels and what measures apply to each level
 - e. Focus on the highest, most important aspects of a position
4. **Identify a worker's career aspirations:** With goal setting, it is important to speak to all workers, including people with disabilities, about their potential career paths within the company. These conversations can provide more insight on how to best support your employee. Important considerations to remember are:
- a. **Personal interest:** help employees with disabilities outline their potential career path within the organization, to help better visualize their future at the company. When helping to identify specific milestones for achievement and the supporting resources employees will likely need to tap along their journey. Clear, direct, and consistent communication from the employee about career advancement steps can help workers feel more engaged.
 - b. **Work-life balance:** Encourage your employees to work smart, maximize their efficiency, and leave time and energy for their nonwork interests. This can work exceptionally well for remote teams. Taking a proactive approach to your team's well-being can also prevent stress from rising and leading to burnout. By adopting flexible policies that enhance work-life balance by helping workers find the time to do their jobs, attend to personal demands, and even engage in professional development activities that can aid in their career advancement.

Sharing Roles and Responsibilities in the Performance Management Process

Both workers and managers alike have responsibilities during the performance management process. Candid, two-way conversations with new workers will help you agree upon one another's roles. Here are some ideas for what each of you can commit to:^{1,5}

- Workers:
 - ✓ Strive to achieve any agreed upon standards
 - ✓ Seek out professional and career development opportunities
 - ✓ Accept constructive feedback and make the necessary changes to continue to improve
 - ✓ Voice any questions, concerns, or needs for support
 - ✓ Maintain a record of their personal achievements within the workplace
- Managers:
 - ✓ Stay abreast organizational policies and procedures regarding performance management
 - ✓ Recognize and encourage excellent worker performance
 - ✓ Identify opportunities for improvement where needed
 - ✓ Provide support for health and wellbeing in the workplace
 - ✓ Act as a role model and demonstrating the kind of behaviour you are trying to promote
 - ✓ Encourage feedback from your workers about the performance management process
 - ✓ Source relevant training opportunities for your workers

References

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