

# DCIF Project – Performance Management Tool 3: Conducting Inclusive Performance Reviews In-Person

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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 importance of time periods and check-ins for effective performance reviews for workers with disabilities
- How to give positive and negative feedback to workers about their performance
- How to implement performance improvement plans
- How to implement accommodation plans and take them into consideration during performance review

### Take home points

- Performance management is an ongoing process, and managers need to have regular meetings with their staff. The frequency of these meetings will depend on the experience and seniority of the staff member. Ensure you pick the right approach for your performance conversation. Are to 'day to day check-ins', 'quarterly check-ins', or 'formal performance review' the best fit?
- When evaluating an employee's performance, remember to review past meetings notes, worker's job description, and identify past objectives. Familiarize yourself with any workplace accommodations, and reflect upon the worker's performance when developing your evaluation
- Take time after each meeting to document key discussion points, action-items, or feedback. Keep these notes in a private, secure, confidential location.

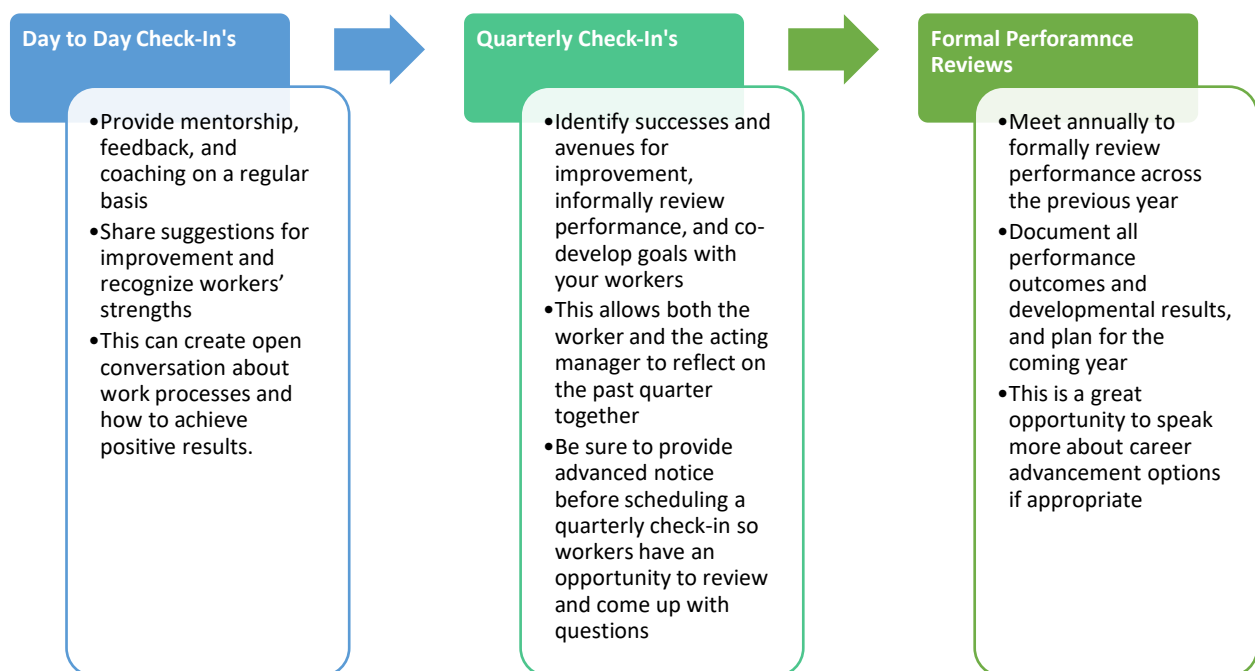
## Types of Performance Management Conversations

Although conversations are expected to happen routinely throughout the year, providing feedback on performance is not subject exclusively to formal performance reviews. There are ample opportunities for a manager to provide feedback, at each step throughout the employee life cycle.

Performance management is an ongoing process, and managers need to have regular meetings with their staff. The frequency of these meetings will depend on the experience and seniority of the staff member – more senior or experienced workers generally needing less frequent meetings.

*Pop Up: Provide an opportunity for all workers, including people with disabilities, to reach out, voice their concerns, seek guidance, and ask questions – not all conversations around performance need to be formal. The key is creating an open dialogue with your worker.*

Review these various approaches to performance conversations:<sup>1</sup>



*Sidebar: Make sure performance management conversations take place in a location that will not be disturbing or overhead by other parties. Provide a quiet, confidential, and discrete space to conduct reviews.*

## How to Have Open, Honest, and Meaningful Conversations

**Disability confident** managers have learned how to communicate with their workers in open and honest ways. They have developed a workplace culture where ongoing dialogue and feedback about performance is welcomed among all employees, to build a stronger workforce and make improvements. Here are some helpful tips for how to have more open, honest, and meaningful conversations:<sup>2</sup>

- Show that you support a worker's wellbeing by creating a culture of care – remind them about flexible workplace policies and benefits, check in on how they are, and be available for concerns or questions
- Communicate often that the worker is valuable to the company, and find opportunities for them to meet their full potential

- Model the behaviours you want to see in your workers – speak up about the conditions you need to work best and invite them to do the same
- Ask your workers for feedback on your management style and leadership, so you can grow your confidence and ability to support your team
- If there is a performance management issue that is challenging, know who you can go to for support to address it
- Cultivate a workplace environment and culture where workers have a safe and confidential way to share and implement feedback

*Sidebar: Keep good records of each review meeting detailing any action to be taken and by whom. At each meeting you should refer to the notes from the last meeting.*

## How to Evaluate Performance in an Inclusive Way<sup>3</sup>

Before reflecting on a worker’s performance within the recent period, keep in mind these best practices for performance reviews:

<b>Formal performance reviews are an opportunity to:</b>	<b>Formal performance reviews should not be used to:</b>
<ul style="list-style-type: none"> <li>● Review a worker’s past performance</li> <li>● Work together to create objectives for the future</li> <li>● Help workers to improve their performance</li> <li>● Discuss career development and advancement opportunities</li> </ul>	<ul style="list-style-type: none"> <li>● Air views about a worker based on assumptions, generalizations, or personal prejudices</li> <li>● Surprise workers with performance-related concerns</li> <li>● Evaluate a worker’s performance based on a task that is not a part of their job description</li> </ul>

Here are some steps you can cycle through when evaluating a worker’s performance:<sup>3</sup>

- ✓ Re-read your past meeting notes from the **probation period**, informal check-ins, and regular performance review meetings
- ✓ Review the worker’s job description to remind yourself what the person was employed to do and to check if the role has changed significantly – more often than you think, workers’ roles evolve, and new job descriptions may need to be written
- ✓ Identify the worker’s past objectives, whether it was documented by you or a previous manager, for the period being assessed
- ✓ Familiarize yourself with any workplace accommodations that have been agreed upon with the worker – remember, accommodations may have been implemented by a previous manager
- ✓ Reflect upon the worker’s performance, and when developing your evaluation, be sure to have examples to support your views

## Inclusive Performance Reviews Meetings

### Reframing Messaging, Language, and Feedback Delivery

After performance review meetings, you want your workers to leave with a clear understanding of their level of performance and how they can improve. It can be difficult to find the right words to describe a worker’s performance. Be sure to read through these examples of what not to say when assessing your workers:

- "Can we make this quick? I've got a 10 a.m. meeting."
  - Make sure you leave ample time for the review. Having to cut a worker's performance review meeting short before both sides are finished means one side feels cheated and unimportant.
- "I think you're doing this work exactly as I would—great job!"
  - This comment very clearly compares the worker to the boss. This is a dangerous standard to create. Incentivizing "yes-men and women" and stifling independent thinking will restrict creativity and problem-solving in the future.
- "You crushed the other sales reps this year...absolutely destroyed."
  - Directly comparing workers to one another is not productive nor helpful. While encouraging some healthy office competition is okay, when it comes to performance review comments, leave other people out of it. Measure workers against their own past performance.
- "I've got no feedback for you—you did great!"
  - Every worker has things they've done well and things they need to improve upon. Not preparing both positive and constructive feedback communicates to your worker that you may not have paid close enough attention to their work. Even the best workers expect to hear something they need to do better.
- "I heard you handled the X [e.g., presentation, meeting] very poorly, and I have to say, I'm disappointed."
  - In this case, the manager was not able to observe the worker's performance first-hand. Instead, an evaluation of the worker's performance traveled through the grapevine. Additionally, the manager did not give the worker any opportunity to explain what happened from their point of view. A simple, "How do you think that presentation went?" would have made the conversation more approachable.
- "Because of your terrible job on the X [project, case, campaign] you won't be getting your bonus this year."
  - Don't bring up compensation in a performance review—keep the conversations separate. The development of your workforce shouldn't be overshadowed by what their pay stub is going to read. Combining the two can make the worker defensive, discouraged, or unwilling to learn.
- "You are always late to work."
  - Words like "never" and "always" just add fuel to a potential fire. No one does something 100% of the time and acting as such will just leave your worker feeling unfairly put on trial. You can have the same conversation without using those words.
- "If you hit the \$100,000 mark this year, there'll be a spot at corporate waiting for you."
  - Don't promise, and don't threaten. In fact, avoid if-then statements altogether. You don't know where your company or your worker is going to be in six months.
- "You're lucky to get this bonus."
  - Be happy for your worker – don't begrudge them. This can only come across as condescending.

## A Checklist for Inclusive Performance Review Meetings

The following guidance will help you manage the performance of all workers, including those with disabilities. Keep in mind that this guidance is not rigid – in some instances, a manager may need to modify the way performance is evaluated to accommodate a worker's needs or specific disability.

### Before the Meeting: Prepare

- ✓ Review any notes taken during the last meeting to get up to speed on any planned deliverables
- ✓ Review the worker's list of goals and projects to see if there are any due or running off course

- ✓ Make a note of important department or company changes that should be discussed
- ✓ Review any feedback sent/received to identify any discussion points
- ✓ Unplug from other activities so the worker knows they have your complete focus

### During the Meeting: Possible Discussion Points<sup>3</sup>

<b>Make Your Worker Comfortable</b>	<ul style="list-style-type: none"> <li>✓ Use conversation starters to engage the worker in conversation</li> <li>✓ Use open-ended questions to allow workers to share their experiences candidly</li> <li>✓ Let the worker steer the conversation, but stay aware of any important discussion items that you have prepared for the meeting</li> </ul>
<b>Goal/Project Updates</b>	<ul style="list-style-type: none"> <li>✓ Ask questions to get a sense of the status of short-term goals and long-term goals</li> <li>✓ Take the time to discuss any challenges or lessons learned</li> <li>✓ Create a share understanding of how the worker is managing their current workload</li> <li>✓ If the worker is not meeting their goals, brainstorm ways to get back on track with goal achievement</li> <li>✓ Offer coaching, assistance, or support for any challenges the worker has faced</li> <li>✓ Determine any new goals for the worker</li> </ul>
<b>Accomplishments and Areas for Improvement</b>	<ul style="list-style-type: none"> <li>✓ Review the worker's recent accomplishments together</li> <li>✓ Provide positive, constructive feedback to affirm their value</li> <li>✓ Balance your discussion of their strengths and area where workers can improve</li> <li>✓ Ask the worker to self-identify areas where they believe they can improve, and discuss the ways that you can help them achieve their goals</li> <li>✓ Provide feedback about any other areas where improvement may be needed</li> </ul>
<b>Changes in Performance or Behaviour</b>	<ul style="list-style-type: none"> <li>✓ Ask questions that invite the worker to share their experience (e.g., "I've noticed that you haven't been as communicative lately over chat. Is there anything I support you with this?" or "Within the last few months, it seems like you have been pushing due dates more than usual. I just wanted to check in with you about how you are feeling?")</li> <li>✓ Understand that a change in performance or behaviour could be related to problems at home or work, because the worker has acquired a disability, or because an existing disability has changed over time</li> </ul>
<b>Requests for Change</b>	<ul style="list-style-type: none"> <li>✓ Ask the worker if anything needs to change for them to meet their performance goals</li> <li>✓ Identify potential supports for the worker in a collaborative manner</li> <li>✓ Discuss what adjustments can be made, either on a temporary or permanent basis, to help them overcome any barriers they may be facing</li> <li>✓ Review any agreed upon accommodations to ensure they are still effective</li> <li>✓ Ensure you ask the worker about how your management style and leadership can be improved upon</li> </ul>

	<ul style="list-style-type: none"> <li>✓ Discuss any general roadblocks or distractions that might be affecting the worker</li> </ul>
<b>Consider Additional Supports</b>	<ul style="list-style-type: none"> <li>✓ Think about who can help the worker – sometimes, workers may need to be referred to an occupational therapist, accommodation expert, etc. who may be able to better identify the problems they are having at work</li> <li>✓ Discuss the possibility of introducing development and training to support the worker</li> </ul>
<b>Status of Training/Learning</b>	<ul style="list-style-type: none"> <li>✓ Discuss any training items that are due or in progress</li> <li>✓ Ask the worker if they have any specific requests for training or career development</li> <li>✓ Ask if the worker is learning from other peers or mentors across the organization, or if they would like to in the future</li> <li>✓ Recommend training items to improve workers’ skills and career potential</li> </ul>
<b>Career Development</b>	<ul style="list-style-type: none"> <li>✓ Discuss the worker’s career goals</li> <li>✓ Discuss how you can work together to achieve their career goals</li> <li>✓ Discuss opportunities and career paths for the worker</li> </ul>
<b>Company Team Updates/News</b>	<ul style="list-style-type: none"> <li>✓ Discuss any important company/team updates or news</li> <li>✓ Confirm any action-items needed</li> </ul>
<b>Plan for the Week/Month/Quarter</b>	<ul style="list-style-type: none"> <li>✓ Review the priorities for the short and long term</li> <li>✓ Plan the quarterly performance reviews in advance</li> </ul>

### At the End of Meeting: Summarize

- ✓ Before the worker leaves the meeting, spend a few moments summarizing the key discussion points
- ✓ Remind workers of any action items and reinforce any acknowledgement or coaching tips provided
- ✓ Ask the worker if anything was missed and remind them of when the next meeting will be

### After the Meeting: Document

This small step is significant yet is often skipped over.

- ✓ Take 2-5 minutes after each meeting to record key discussion points, action-items, or feedback
- ✓ Use this document to help kick-start the next meeting
- ✓ Refer back to this document as a useful log when you want to review a worker’s performance trends
- ✓ Keep these notes in a private, secure, confidential location

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*“Based on performance evaluations data, employees with and without disabilities obtain functionally equivalent ratings in performance.”*

*- Hernandez & McDonald, 2010<sup>4</sup>*

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## References

<sup>1</sup> Hire for Talent (n.d.). <https://hirefortalent.ca/>

<sup>2</sup> Skillsforcare (2021, May). *People performance management toolkit*. NHS Employers. <https://www.skillsforcare.org.uk/Documents/Leadership-and-management/People-Performance-Management-Toolkit/People-Performance-Management-Toolkit.pdf>

<sup>3</sup> Business Disability Forum (2014). *Line Manager Guide Performance Management*. [https://rct.learningpool.com/pluginfile.php/711/mod\\_folder/content/0/Saesneg%20-%20English/BDF%20Performance%20Management%20Line%20Managers%20Guide.pdf?forcedownload=1](https://rct.learningpool.com/pluginfile.php/711/mod_folder/content/0/Saesneg%20-%20English/BDF%20Performance%20Management%20Line%20Managers%20Guide.pdf?forcedownload=1)

<sup>4</sup> Hernandez, B., & McDonald, K. (2010). Exploring the costs and benefits of workers with disabilities. *Journal of Rehabilitation*, 76(3), 15-23.