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# PERFORMANCE MANAGEMENT

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TOOL 3: CONDUCTING INCLUSIVE  
PERFORMANCE REVIEWS IN-PERSON

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# TOOL 3: CONDUCTING INCLUSIVE PERFORMANCE REVIEWS IN-PERSON

## 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

## What is Performance Management?

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: [1]

### Day-to-Day Check-In's



- Provide mentorship, feedback, and coaching on a regular basis
- Share suggestions for improvement and recognize workers' strengths
- This can create open conversation about work processes and how to achieve positive results

### Quarterly Check-In's



- Review successes, improvements, and co-develop goals with your workers
- This lets both worker and manager reflect on the past quarter together.
- Provide advance notice for quarterly check-ins so workers can prepare questions

### Formal Performance Review



- Review successes, improvements, and co-develop goals with your workers
- This lets both worker and manager reflect on the past quarter together.
- Provide advance notice for quarterly check-ins so workers can prepare questions

Sidebar: Ensure performance discussions happen in a quiet, confidential space, away from distractions and others.



# TYPES OF PERFORMANCE MANAGEMENT CONVERSATIONS

## 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: [2]

- 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

## How to Evaluate Performance in an Inclusive Way [3]

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

Formal performance reviews are an opportunity to:	Formal performance reviews should not be used to:
<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: [3]

- Re-read past meeting notes from the probation period, informal check-ins, and performance reviews.
- Review the worker's job description to check if the role has evolved and may need updating.
- Identify the worker's past objectives, whether set by you or a previous manager.
- Familiarize yourself with any workplace accommodations, including those arranged by a previous manager.
- Reflect on the worker's performance and have examples to support your evaluation

# INCLUSIVE PERFORMANCE REVIEWS MEETINGS

## Inclusive Performance Reviews Meetings

### Reframing Messaging, Language, & 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."**

Leave enough time for the review. Rushing through it makes one side feel undervalued.

**"I think you're doing this work exactly as I would—great job!"**

Comparing the worker can stifle independent thinking and discourage creativity.

**"You crushed the other sales reps this year...absolutely destroyed."**

Avoid comparing workers. Focus on individual performance, not competition. Measure workers against their own past performance.

**"I've got no feedback for you—you did great!"**

Every worker has strengths and areas for improvement. Skipping constructive feedback can show you weren't paying close attention.

**"I heard you handled the X [e.g., presentation] poorly, and I'm disappointed."**

Don't rely on hearsay. Ask the worker for their perspective before drawing conclusions.

**"Because of your terrible job on the X [project], you won't get a bonus this year."**

Keep compensation discussions separate from performance reviews to avoid defensiveness.

**"You are always late to work."**

Avoid absolutes like "always" or "never." They are unfair and unproductive. You can have the same conversation without using those words.

**"If you hit the \$100,000 mark, there'll be a spot at corporate."**

Don't make promises or threats. Avoid if-then statements about the future as you can't ever be certain what will happen down the road.

**"You're lucky to get this bonus."**

Be supportive and appreciative, not condescending.

# A CHECKLIST FOR INCLUSIVE PERFORMANCE REVIEW MEETINGS

## **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 notes from the last meeting to check on planned deliverables.

Check the worker’s goals and projects for any due or off track.

Note important department or company changes to discuss.

Review feedback to identify discussion points.

Unplug from distractions to give the worker your full attention.

### **During the Meeting: Possible Discussions Points [3]**

#### **Make Your Worker Comfortable**

Start with conversation openers to engage the worker.

Ask open-ended questions for candid responses.

Let the worker lead, but stay mindful of key topics you need to cover.

#### **Goal/Project Updates**

Ask about the status of short- and long-term goals.

Discuss challenges and lessons learned.

Ensure a shared understanding of workload management.

If goals aren’t met, brainstorm ways to get back on track.

Offer coaching or support for any challenges.

Set new goals for the worker.





# A CHECKLIST FOR INCLUSIVE PERFORMANCE REVIEW MEETINGS

## Accomplishments and Areas for Improvement

- Review recent accomplishments together.
- Give positive, constructive feedback to affirm their value.
- Balance strengths with areas for improvement.
- Ask the worker to self-identify areas for growth and discuss how you can support them.
- Provide feedback on any other areas needing improvement.

## Changes in Performance or Behaviour

- Ask questions that encourage the worker to share their experience (e.g., “I’ve noticed you’ve been less communicative—how can I support you?”).
- Understand that changes in performance could stem from personal issues, an acquired disability, or changes to an existing one.

## Requests for Change

- Ask if changes are needed to meet performance goals.
- Identify potential supports collaboratively.
- Discuss temporary or permanent adjustments that can help overcome barriers.
- Review current accommodations to ensure their effectiveness.
- Ask how your management style can be improved.
- Discuss general roadblocks or distractions affecting the worker.



# A CHECKLIST FOR INCLUSIVE PERFORMANCE REVIEW MEETINGS

## Consider Additional Supports

Consider referring the worker to specialists like an occupational therapist if needed.

Discuss the potential for development and training to support the worker.

## Status of Training/Learning

Review any due or in-progress training.

Ask about specific training or career development requests.

Inquire if they are learning from peers or mentors, or if they want to.

Recommend training to enhance skills and career potential.

## Career Development

Discuss the worker's career goals

Discuss how you can work together to achieve their career goals

Discuss opportunities and career paths for the worker

## Company Team Updates/News

Discuss any important company/team updates or news

Confirm any action-items needed

## Plan for the Week/Month/Quarter

Review the priorities for the short and long term

Plan the quarterly performance reviews in advance



# A CHECKLIST FOR INCLUSIVE PERFORMANCE REVIEW MEETINGS

## **At the End of Meeting: Summarize**

Summarize key discussion points before the worker leaves.

Remind them of action items and reinforce any coaching tips.

Ask if anything was missed and confirm the date of the next meeting

## **After the Meeting: Document**

Spend 2-5 minutes after each meeting recording key points, action items, and feedback.

Use these notes to start the next meeting and review performance trends.

Keep the notes private, secure, and confidential.

**“Based on performance evaluations data, employees with and without disabilities obtain functionally equivalent ratings in performance.”**  
- Hernandez & McDonald, 2010<sup>4</sup>

## REFERENCES

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

[2] 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>

[3] 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%20Managment%20Line%20Managers%20Guide.pdf?forcedownload=1](https://rct.learningpool.com/pluginfile.php/711/mod_folder/content/0/Saesneg%20-%20English/BDF%20Performance%20Managment%20Line%20Managers%20Guide.pdf?forcedownload=1)

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