SHRC
SENTINEL HUMAN RESOURCES CONSULTING
PEOPLE. STRATEGY. RESULTS.

WHY TRADITIONAL PERFORMANCE APPRAISALS DON'T WORK

Building a Better System for Performance Development

AMCTO
THE MUNICIPAL EXPERTS

ZONE 5
The Counties of Haliburton, Hastings-Lennox and Addington, Northumberland, Peterborough, and Prince Edward, the District Municipatily of Muskoka and the City of Kawartha Lakes.

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WHEN DID YOUR LAST

PERFORMANCE APPRAISAL

actually change someone's performance?

Think of a real example.

A quick show of hands

01 It led to a useful change

02 It mainly completed a requirement

03 It contained a surprise

04 I cannot remember the last one

The mix of answers is the point.

What the annual appraisal often becomes

A YEAR OF WORK

compressed into

ONE FORM
ONE RATING
ONE MEETING

The Process may be complete.

The *Development* potential is missing.

One meeting is being asked to do six jobs

01 **ASSESS THE YEAR**

Summarize results and conduct

02 **MOTIVATE**

Create commitment for the future

03 **SET GOALS**

Agree on priorities and outcomes

04 **DEVELOP**

Build skill and capability

05 **SUPPORT PAY**

Inform compensation or promotion

06 **DOCUMENT CONCERNS**

Create a record of gaps / areas to improve

Competing purposes change the conversation

PAY DECISION	OPEN DEVELOPMENT
FORMAL RECORD	CANDID REFLECTION
PAST RATING	FUTURE PRIORITIES

The employee may be stuck trying to understand the "verdict" while the manager is trying to discuss the future.

The proper role of an (annual) review

THE YEAR

EXPECTATIONS	WORK	FEEDBACK	DEVELOPMENT
What matters and why	Results and changing priorities	Recognition and course correction	Learning and new responsibility

The review consolidates conversations that already happened.

PERIODIC REVIEW
A useful summary

MODULE 1

THE TWO-STREAM MODEL

Performance development and performance correction serve different purposes.



Performance management is the total system

PERFORMANCE MANAGEMENT

PERFORMANCE DEVELOPMENT

Helping people succeed and grow

PERFORMANCE CORRECTION

A response to a significant or recurring gap

Performance development

THE WORK OF DEVELOPMENT

People need to know what good work looks like, receive useful feedback, build capability and take greater ownership.

01 Clear expectations

02 Worthwhile objectives

03 Evidence and dialogue

04 Feedback close to the work

05 Learning and recognition

06 Employee ownership

Performance correction

A DIRECT RESPONSE

The employee must understand the gap, the required change and the possible consequences.

01 The standard

02 The facts

03 The effect of the gap

04 The required change

05 Available support & resources

06 Review period and consequences

when an employee expects development

and receives an undisclosed disciplinary meeting?

Purpose and possible consequences must be clear before the meeting begins.

Which conversation comes first?

SITUATION 1

A capable employee misses one deadline after priorities changed twice.

DEVELOPMENT

CORRECTION

DIAGNOSIS FIRST

Which conversation comes first?

SITUATION 2

A serious safety requirement is ignored after clear instruction and prior feedback has been given.

DEVELOPMENT

CORRECTION

DIAGNOSIS FIRST

Which conversation comes first?

SITUATION 3

An employee has mastered the role and is ready for a more complex assignment.

DEVELOPMENT

CORRECTION

DIAGNOSIS FIRST

MODULE 2

CLARITY, OBJECTIVES AND EVIDENCE

Performance begins with the work, not with the appraisal form.



Performance starts with the work

ORGANIZATIONAL PRIORITY	What result matter to the municipality or employer?
ROLE CONTRIBUTION	How does this job influence that result?
OBSERVABLE PERFORMANCE	What would good work look like in practice?
CONDITIONS FOR SUCCESS	What must be available for the employee to deliver (resources)?

Conditions for success

THE EMPLOYEE NEEDS

01 A clear result

02 Reasonable priorities

03 Authority to act, resources

04 Information and feedback

THE EMPLOYER MUST PROVIDE

01 Time and workable processes

02 Tools, resources & access

03 Training where needed

04 A manager who addresses problems early

Conditions for success

THE EMPLOYEE NEEDS



01 A clear result

02 Reasonable priorities

03 Authority to act

04 Information and feedback

THE EMPLOYER MUST PROVIDE



01 Time and workable processes

02 Tools and access

03 Training where needed

04 A manager who addresses problems early

A capable employee can still fail inside a badly designed system.

DOT objectives

D

DEADLINE

When is the result expected? What

O

OUTCOME

What will be different, improved, completed or learned?

T

TARGET FOR REVIEW

What evidence will both people examine? Date? Outcome?

A weak objective

“Improve communication with residents.”

A weak objective

“Improve communication with residents.”

By when?

What changes for residents?

What evidence will we review?

A usable objective

DEADLINE	By March 31
OUTCOME	residents with open files or inquiries will receive timely, predictable updates
TARGET FOR REVIEW	review the age of unresolved inquiries and a sample of updates provided to residents each month

The objective protects the outcome without pretending that one number tells the whole story.

A measure can improve while the service gets worse

THE NUMBER IMPROVES

Replies go out faster

Response time falls

THE OUTCOME DETERIORATES

Answers are incomplete

Residents call again

Targets should focus attention. They should not replace judgment.

Measuring results

What gets measured, gets done.



Four sources to support measurement

01

RESULTS

Work products and outcomes

02

OBSERVATION

What the manager directly saw

03

DIALOGUE

The employee's information and context

04

OPERATIONS

Relevant stakeholder and workflow information

CONSIDERED JUDGMENT

The metric says response times increased

BUILDING PERMIT INQUIRIES

LONGER RESPONSE TIMES

Convenient Conclusions

"The team needs to work faster."

The number is real.
The diagnosis may still be wrong.

The context changes the diagnosis

DIRECT OBSERVATION

Staff handle calls professionally.

WORK REVIEW

More time goes to obtaining missing information.

DIALOGUE

Complete and incomplete applications enter the same queue.

OPERATIONS

The new intake process changed the workload.

The problem may sit in the intake process, the team's capability, or both.

MODULE 3

FEEDBACK AND DEVELOPMENT CONVERSATIONS

Direct language, shared information and a useful next step.



Labels close the conversation

CHARACTER JUDGMENT

“You are disorganized.”

Debate shifts to identity and intent.

OBSERVED WORK

“The last three project updates were issued after the agreed dates. Two did not identify which decisions remained outstanding.”

Factual & Specific:
Both people can examine the same facts.

Candour belongs in development. Vagueness does not.

A useful feedback conversation

01	OBSERVED WORK	What happened?
02	IMPACT	Why did it matter?
03	EMPLOYEE PERSPECTIVE	What information are we missing?
04	NEXT ACTION	What will happen differently?

End with a concrete future action and the support that fits the problem.

Both people prepare

THE MANAGER BRINGS

- Evidence
- Expectations
- Organizational context
- Decisions that may follow

THE EMPLOYEE BRINGS

- Experience
- Info the manager may not see
- Learning and obstacles
- Ideas for the next period

Ten minutes of preparation can change the quality of the entire discussion.

The development discussion

01 Set the purpose and agenda

02 Start with the employee's perspective

03 Review evidence and expectations

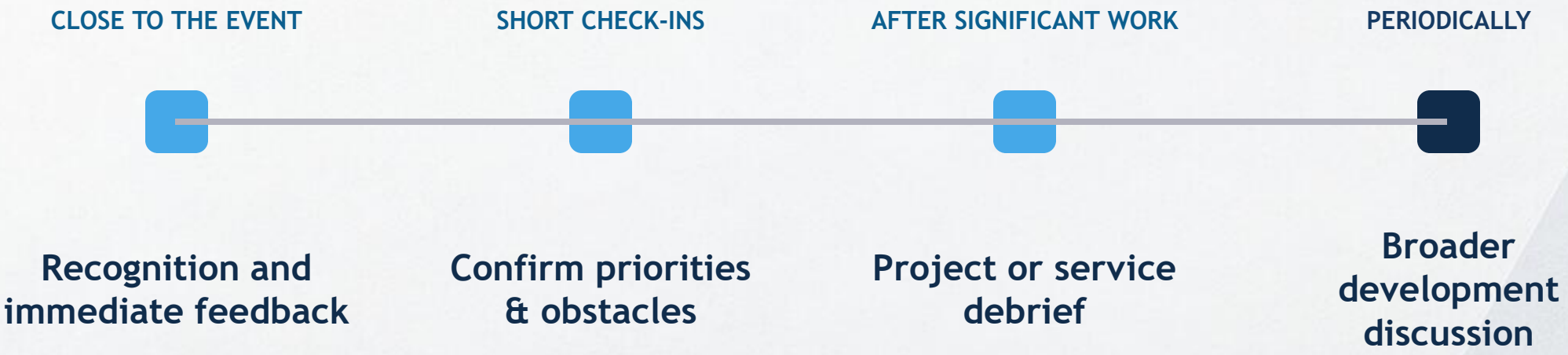
04 Discuss strengths & development opportunities

05 Look forward more than backward

06 Confirm responsibilities & follow-through

A planned conversation with a forward-looking result

The periodic discussion should contain no surprises



Periodic meetings consolidate earlier conversations, confirm successes & provide opportunities for correction if needed

MODULE 4

DIAGNOSIS AND ACCOUNTABILITY

Accurate diagnosis strengthens accountability. It does not weaken it.

Is an employee performance problem really an employee problem?

01 Were expectations clear?

02 Did the employee understand why the work mattered?

03 Were authority, information, time, tools and training available?

04 Was feedback recent and specific?

05 Were concerns addressed early?

Ask yourself these questions before your next difficult conversation.

Accountability runs both ways

THE MANAGER

Clarifies the standard

Creates workable conditions

Gives timely feedback

Addresses concerns early

THE EMPLOYEE

Uses reasonable judgment

Asks when expectations conflict

Identifies risks

Meets standards within their control

Sometimes one person must change.
Often the work requires change on both sides.

A municipal case

THE FACTS

A municipal waste site coordinator issued three late file updates in six weeks.

Two updates did not identify the next decision or responsible person.

Residents began calling for clarification.

THE MANAGER'S FIRST CONCLUSION

"They are not taking ownership."

What must the manager know before accepting that conclusion?

Three changes you can make next week

01 Separate performance *development* from formal *correction*.

02 Replace annual surprises with shorter conversations tied to real work.

03 Draft one important objective using DOT and agree on the evidence.

The annual review becomes a summary of development that is already well known.

LESS PAPERWORK

MORE DEVELOPMENT.

Clear expectations. Better evidence.

Timely conversations.

Accountability when it is required.

QUESTIONS?

Based on the forthcoming revised edition of

Creating the Ultimate Performance Development System

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