



Meaningful Accountability: A New Approach to Performance Management

Positively Partners

Positively Partners is a social enterprise that helps schools and nonprofit organizations achieve exceptional performance from their employees.

We are psychology practitioners, human resources professionals, trainers and system design experts working together to create highly productive, mission-driven, **work communities**.



Agenda



**Traditional Approaches to
Performance Management
Don't Work**

01



**What Works and What Are the
Conditions for Increased
Employee Performance**

02



Case Study: Citizen Schools

03



Steps for Implementation at Your Organization

04



Performance Management

- A **process** by which people are enabled to perform to the best of their abilities.
- A **whole work system** that begins when a position is created and ends when an employee leaves the organization.
- It is **not just performance appraisals**, but the series of steps taken by managers to support, develop, coach, understand and connect with their direct reports.



We Need A Little Discipline

Skill and knowledge gaps can be addressed through the performance management process: mentoring, coaching and performance improvement plans.

SKILL



VS



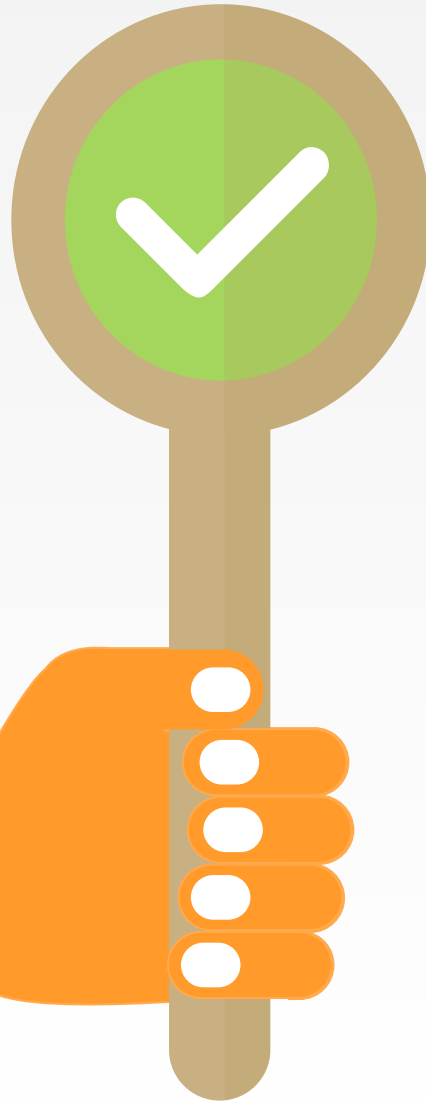
WILL

Lack of motivation or purposeful and repeated noncompliance with organizational policies or values is a disciplinary matter and should be handled as such.

Remembering When

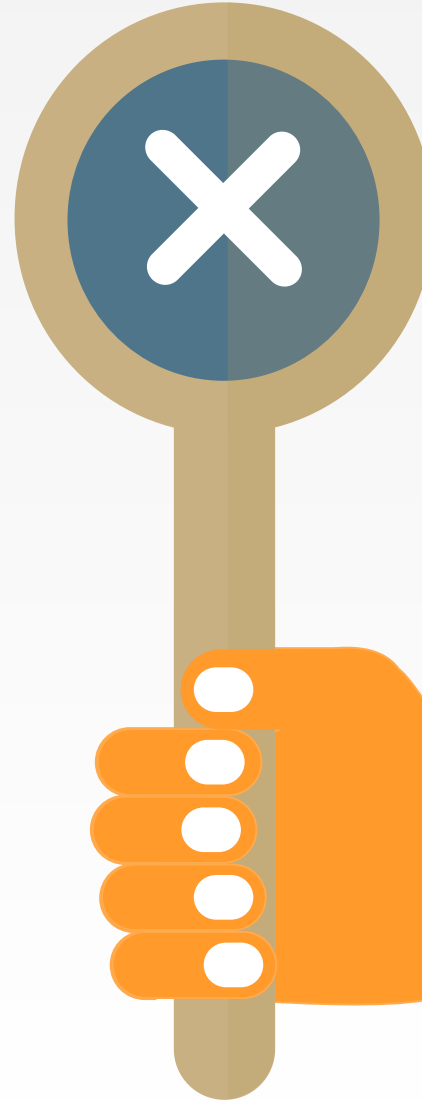
Your Best

Remember a time when a manager positively shaped your performance. What made it work?



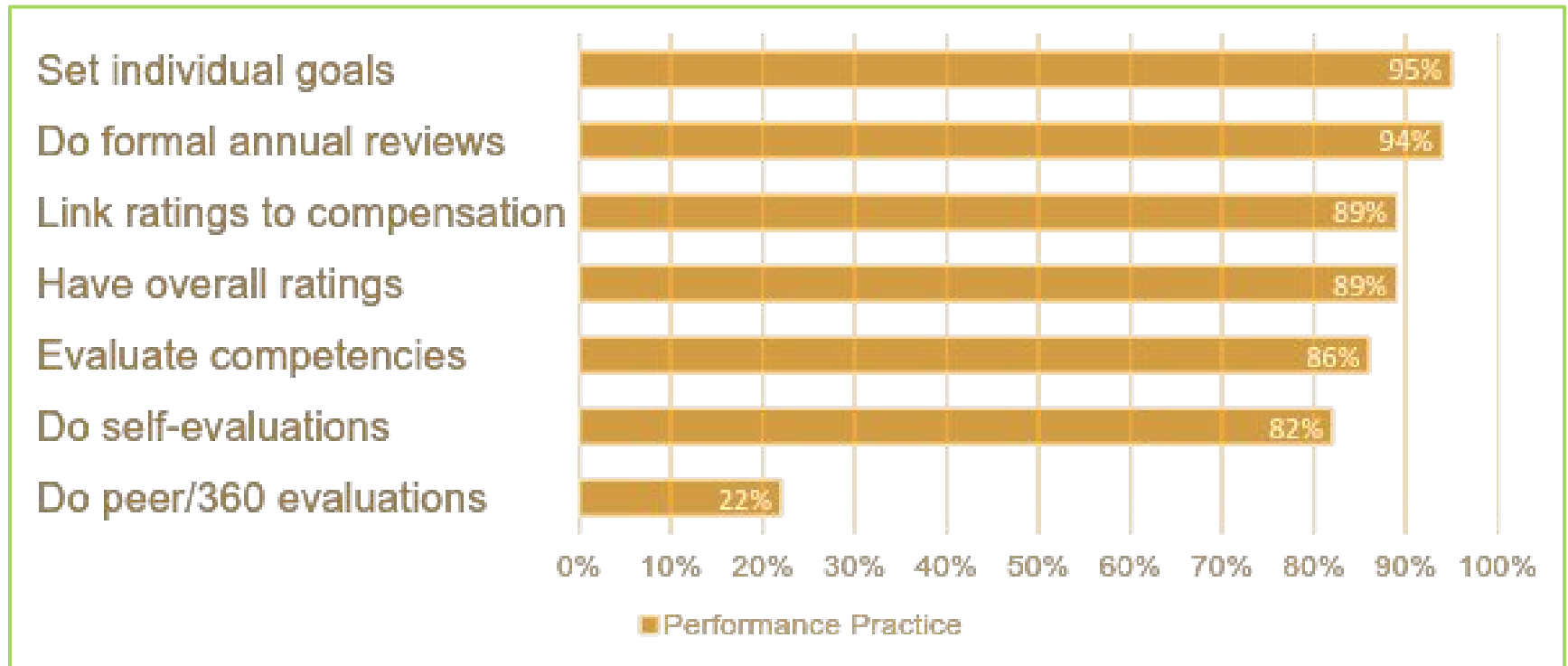
Your Worst

Remember a time when a manager failed to propel forward your performance. What made it fail?



Widely Used Practices...

Most organizations use the same practices to manage performance...



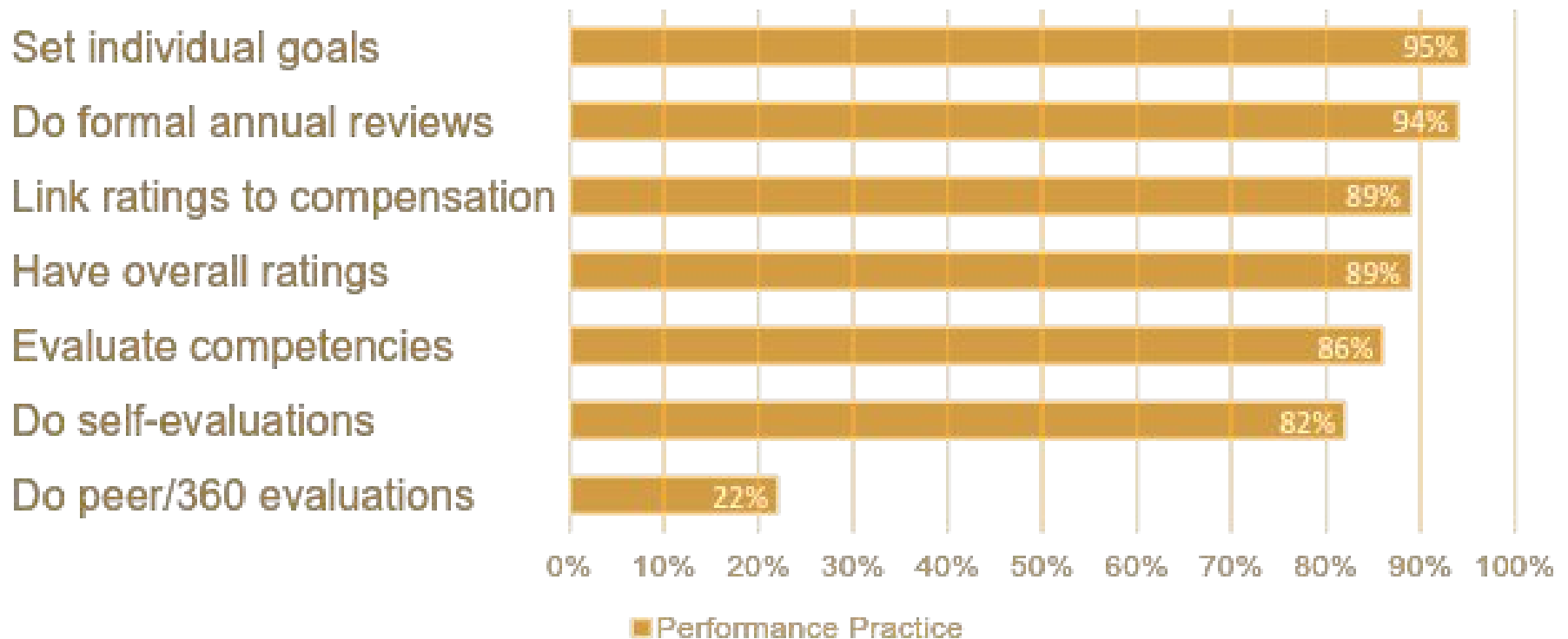
...yet fewer than 3% get the results they are seeking.



...with Minimal Impact

Discussion Point:

Why might these elements not work to drive performance?



Defending Performance Appraisals

Organizations maintain traditional approaches to performance management because:

- Perceived **legal protection** (documentation & record keeping)
- Rationale for **decision making** (hiring, firing, promotion)
- Insights for **succession planning and training**
- Rationale for **compensation decisions**
- Promotes **consistent employee experience**



Defending Performance Appraisals

Coaching
Compensation
Analysis
Results
Remediation

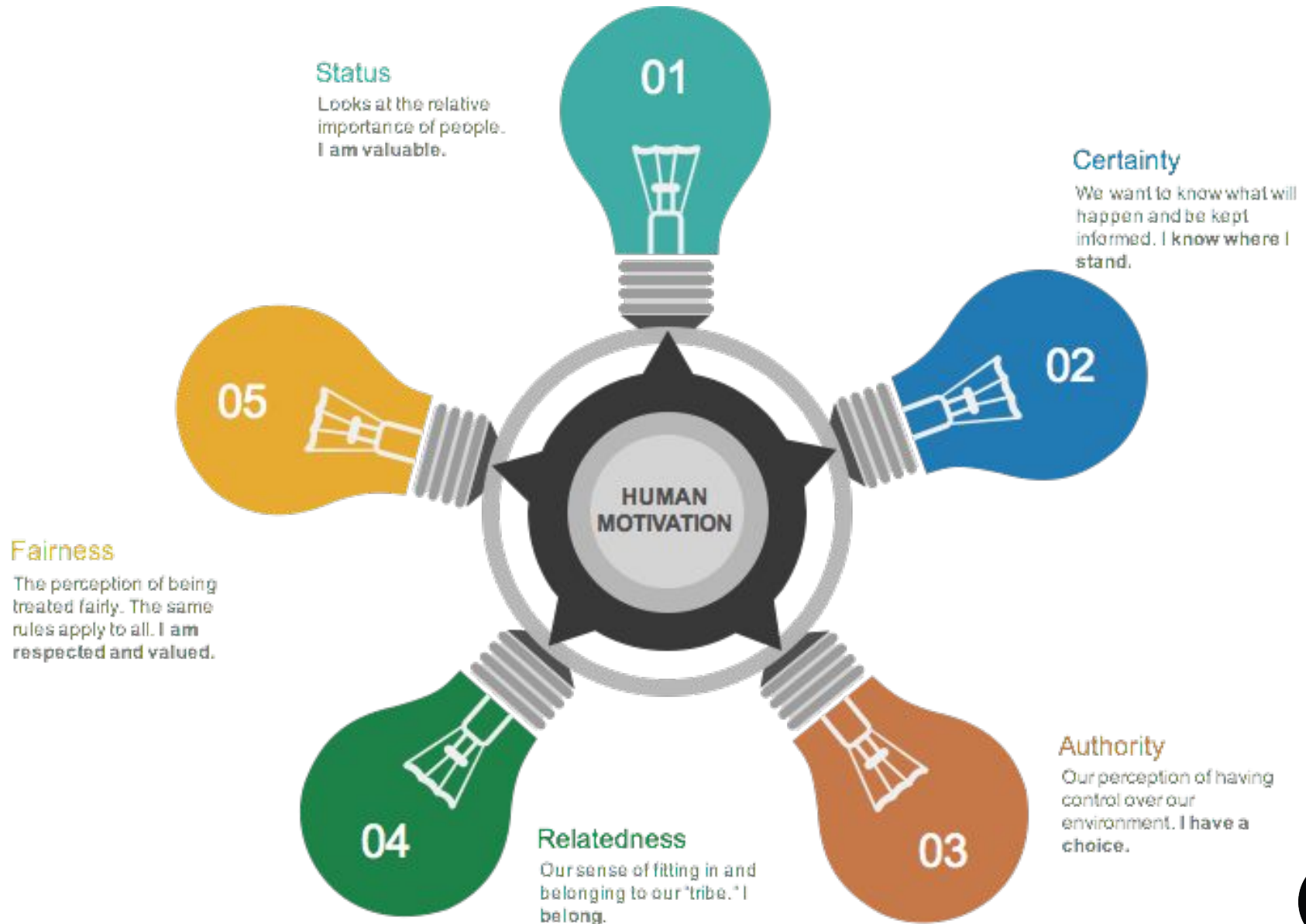


Reasons for Shortcomings

1. **Competing priorities** - employees want recognition and managers want to see improvement.
2. **Lack of trust** - do I care what my manager thinks?
3. **Numbers label people** - are you judging me or my work?
4. **Process is complex** - can one manager do it all for each direct report?
5. **Failures of servant leadership** - am I here to judge or help?



Neuroscience: the SCARF Model



Neuroscience: the SCARF Model



Source: Rock, David "SCARF: a brain-based model for collaborating with and influencing others" (2008).



Kotter vs. Heath Bros

Kotter's Theory of Change

Create urgency. The need for change to survive; a burning platform.

"I can't stay here anymore. It's crowded and without more food I will die."



Made to Stick

Draw people towards a positive version of the future with sticky ideas.

"I'm heading to the clear waters of bowl 2 where the gravel is paved with gold."



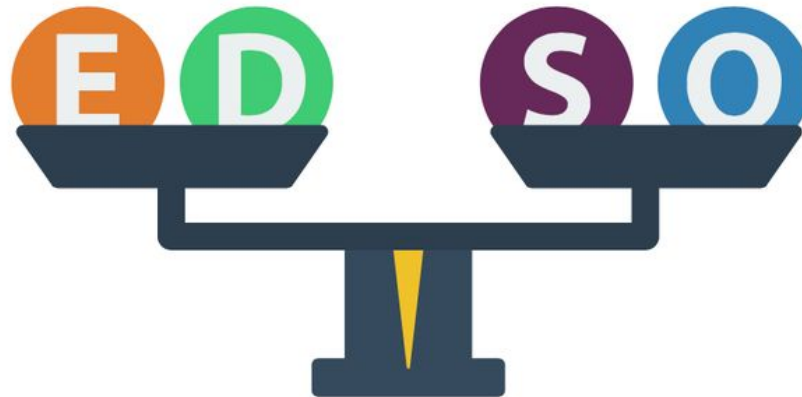
Neuroscience: EDSO

Selfish chemicals

We get these
on our own.

Selfless chemicals

We need other people
for their release.



No one chemical is better than the other - they each serve a specific purpose. We operate at our best when we have BALANCE across all of these chemicals.



Neuroscience: Oxytocin



With higher levels of oxytocin in our bodies, we are less susceptible to the addictive nature of dopamine. We are also better able to cope with stress, lowering levels of another chemical, cortisol. We are more likely to trust each other and cooperate, enabling us to overcome obstacles and accomplish remarkable things, together.



Case Study: Citizen Schools

Setting the Stage:

Citizen Schools used a traditional performance management process for many years that included the practice of managers rating employees on goal attainment and competencies twice annually (mid and end of year).



Context & Complications

- ❑ **Lack of Alignment with Goal Setting:** On average, fewer than 40% of employees had set goals with their managers before the start of the mid year review cycle.
- ❑ **Non Compliance:** Less than 50% of managers completed a midyear review with their direct reports, although virtually 100% completed an end of year review because the scores were linked to merit increases in compensation for the following year.
- ❑ **Rating Inflation:** Senior leaders reported that scores submitted for the end of year review were often inflated in order to justify a merit increase that the manager wanted to secure for their employee.
- ❑ **Not Timely:** Leaders also reported that its often took 3 - 3.5 months for managers to submit their midyear reviews.



Design and implement a performance management process that achieves meaningful accountability for Citizen Schools staff:

- More frequent, less formal
- Conversational, bi-directional
- Focused on employee strengths
- Elimination of competency rating

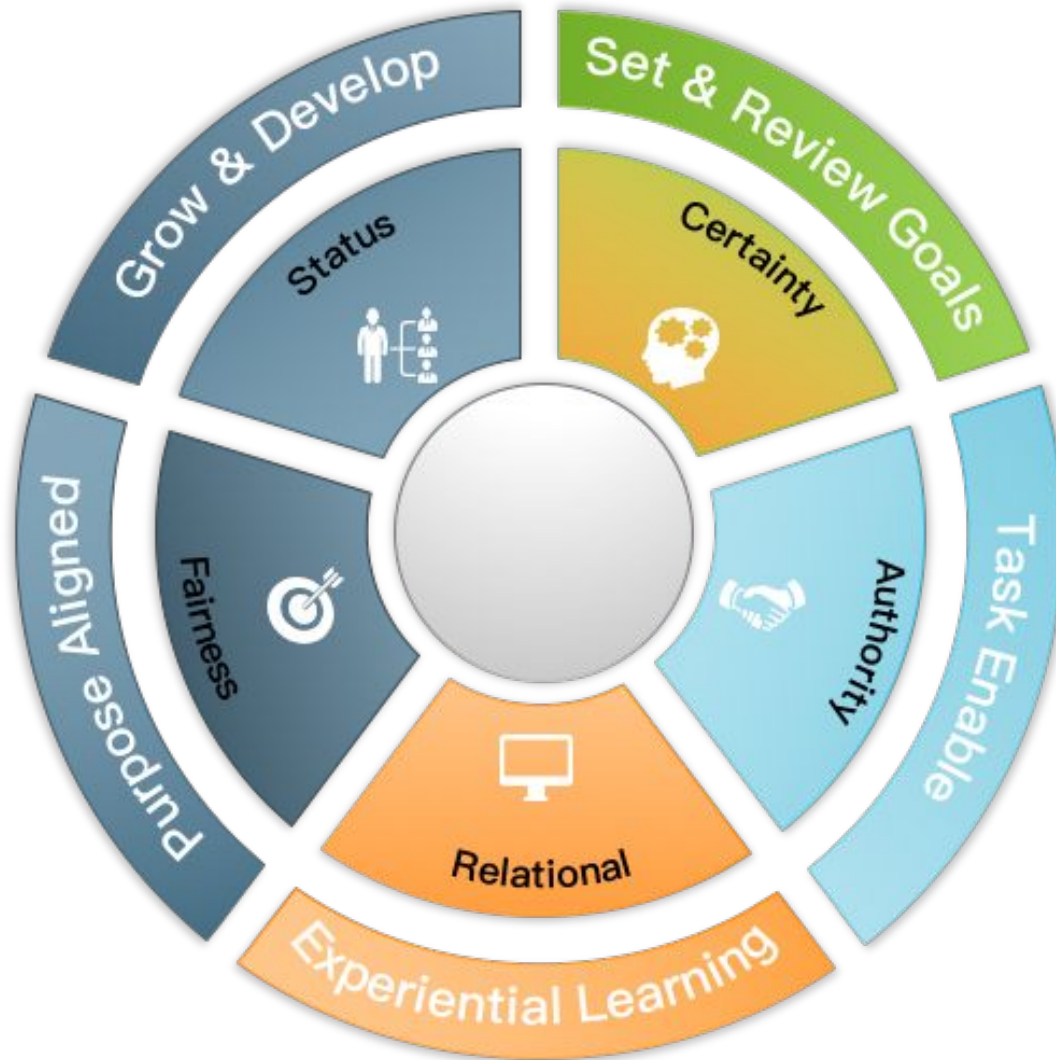


Proof of Success

- ★ Citizen Schools continues to use Meaningful Accountability and has seen **dramatic increases in levels of employee engagement** since implementing this new practice (as measured by Gallup Q12).
- ★ Questionnaires completed by managers and employees, each quarter for the past 18-24 months, show that **98% of managers and employees believe that the process provides high quality, meaningful opportunities** to discuss their progress working towards business goals, as well as opportunities to achieve career progression.



Why does it work?



Meaningful Accountability

1:1s

Dedicated weekly one-on-one interactions of at least 30 minutes that allow managers and direct reports to catch-up, review tactics for goal attainment and position managers to help remove roadblocks to success.

Quarterly Performance Conversations

Deep dives four times per year to review progress towards goals at key milestones and include structured dialogue about strengths, organizational values, career growth or employee engagement.

Continuous Informal Feedback

On-going opportunities for managers and direct reports to share specific and timely feedback with each other. Investing in each others success by providing key insights to promote growth and excellence.



How to Implement

Implementation of components of this approach require a tailored roll out plan that focuses on:

- Generating buy-in and understanding of managers
- Frequent and small group discussions
- Building skill and comfort for managers on leveraging strengths in driving and creating accountability for their employees
- Modeling techniques for facilitating genuine conversations



The 3 C Model

COMMUNICATE

Explain your message only after you have connected to ensure your listener is able and ready to receive information. **Check for understanding** to confirm the information you shared was correctly received.



CONNECT

When you first meet for the day, **engage** and **explore**. For example, shake hands and check in on how things are going personally and professionally.

CHARGE

Send off colleagues and direct reports **empowered** to execute their work and **inspired** by their time with you.



The O3 Structure for 1:1 Meetings

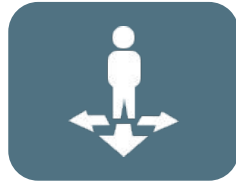
Position your direct reports for success in meeting goals through weekly one-on-one sessions of at least 30 minutes -- preferably one hour.



Scaffolded Conversations



Organizational Values



Career Development



Engagement & Job Satisfaction



Competency Development





**THANK
YOU**

**for listening
Questions?**

.....

Keep in Touch



Jill Smerkers
**Human
Resources**



Adam Maurer
**Positive
Psychology**



Rory Smith
**People
Systems**

jsmerkers@positivelypartners.org
amaurer@positivelypartners.org