Tools for Employee Performance Management

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Jeffco Public Schools Director of Resources, FNS
Affiliation or Financial Disclosure

• McKenna Bush
  • Nothing to Disclose
Parameters for Today’s Session

- We have never “arrived” – we’re here to learn together
- Names used in examples are random – nothing personal
- General questions as we go
- Reference your own district/company policies and procedures
Introduction

- Family of three
- Education / Sports Family
- Outdoor Anything
- Travel & Experiences
Introduction
Introduction
Introduction
Introduction

• Jeffco Public Schools (Colorado)
• Deere & Co
Goals for Today’s Session

Understand:

1. **WHY** performance management is necessary
2. **WHAT** a performance concern is + **WHEN** performance management is necessary
3. **YOUR** role in making an impact
4. **HOW** to administer performance management
1. **WHY** performance management is necessary
WHY Performance Management Matters

PEOPLE will always matter

• Increased Employee Engagement
• Increased Employee Satisfaction
• Increased Employee Productivity
• Decreased Workplace Conflict / Increased Problem Resolution
2. WHAT a performance concern is + WHEN performance management is necessary
**WHAT** is a performance concern + **WHEN** performance management is necessary

### Misconduct:
Unacceptable or improper behavior; intentional or conscious violation of a policy or rule

### Disciplinary Action:
1. Reprimand
2. Suspension (or 2nd reprimand)
3. Termination

### Performance Concern:
Failure to meet basic requirements of a job

### Performance Management:
1. Direction
2. Performance Improvement Plan
3. Demotion or Termination
**WHAT** is a performance concern + **WHEN** performance management is necessary

**Performance Concern**: Failure to meet basic requirements of a job

**Performance Management**:
1. Direction
2. Performance Improvement Plan
3. Demotion or Termination
**WHAT** is a performance concern + **WHEN** performance management is necessary

**Defining the WHAT:**

- Essential duty or responsibility as defined in job description
- Performance objectives or Key Performance Indicators (KPIs) as defined by department leadership
- Direct instruction from manager or supervisor
- Inefficiency in completing assignments
3. **YOUR** role in making an impact
YOUR Role in Making an Impact

Key Perspectives / Mindset for Success

1. How can I help this employee be successful?
   • Have I / we provided resources, training and guidance?

2. What motivates this employee?
   • Invest in your relationships with people

3. Do they understand the importance of their performance?
   • Impacts their teammates
   • Impacts the mission of the organization
YOUR Role in Making an Impact

Avoid:

4. Making excuses
   • Favorite excuse: “I’m just not confrontational.”

5. Disrespecting confidentiality
   • Gossip gets you nowhere
4. HOW to administer performance management
HOW to administer Performance Management

Performance Concern: Failure to meet basic requirements of a job

Performance Management:
1. Direction
2. Performance Improvement Plan
3. Demotion or Termination
Tools to Manage the Performance Concern

*Prior to any formal documentation, engage with the employee

- Clarify that this is coaching and guidance not discipline
- Seek to understand their perspective
- Ensure their understanding of the performance deficiency
- Get them invested in their own improvement
- Encourage the employee – you CAN be successful!
Tool #1: Letter of Direction

• Define the employee’s specific behavior that is not meeting expectations
• Explain the **impact** of their performance / **purpose** of the expectation
• Reference all relevant materials, resources or instructions
• Clarify what is expected moving forward

Remind the employee that the purpose of this letter is to provide coaching, guidance and resources – this is NOT disciplinary.

**You believe in them!**
July 15, 2019

Sally Smith
ID # 1234567

Sally,

As we discussed on July 5, 2019, I’ve noticed/ received information that you have arrived late for your scheduled shift. It is essential to our program that employees arrive on time and prepared to work so that meal preparation and service can occur as scheduled. These expectations are outlined in the following policies/procedures:

- District Policy ABC: Personnel Expectations
- FNS Employee Procedures Handbook: Staff Member Expectations – Good Work Habits

To alleviate the concerns I have regarding your performance, you are being directed to:

- Arrive at work on time.
- Check in with your supervisor when you arrive so that they know you are here.
- Contact your immediate supervisor at least two (2) hours in advance, should you believe you will not be present at work.
This *Letter of Direction* is intended to redirect your efforts and clarify the pertinent performance expectations of the Food and Nutrition Services department on which I believe you can improve. If at any point these directives become unclear or you have questions on how to comply, please see me for clarification. Also, please contact me if there are any resources or trainings that you need so that we can make appropriate arrangements.

At this point, my desire is to align our expectations of what you should be doing as a District employee and that with this clarification you can make the appropriate changes and get on the right track. However, failure to comply with the aforementioned directives will result in further corrective action [in accordance with Article 15 of the Union Negotiated Agreement].

Lastly, if you are experiencing any workplace or personal issues that you do not feel comfortable speaking to me about, I want to remind you that you can always contact the Employee Assistance Program for help at 111-222-3333.

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*Signature below acknowledges receipt of this communication, a discussion of its contents and a clear understanding of future consequences for failure to meet the performance improvement expectation(s)*

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<td><strong>Supervisor’s Signature</strong></td>
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<tr>
<td><strong>Employee’s Signature</strong></td>
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cc:  
Department File  
HR Personnel File
Tool #2: Performance Improvement Plan (PIP)

When performance does not improve after a *reasonable* amount of time and having re-engaged with the employee:

- **Directly state** that performance has continued to not meet expectations
- Explain that a PIP is a more in-depth tool with **specific action steps** and **timelines** to improve
- Allow the employee to view a draft of the PIP and provide their input before finalizing
- Determine meeting dates for progress check-ins
- Re-clarify expectations
### Tool #2: Elements of a PIP

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<th>WHAT?</th>
<th>HOW?</th>
<th>WHEN?</th>
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<td>Performance Deficiency Area</td>
<td>Expected Performance</td>
<td>Action Plan to Improve</td>
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Tool #3: Demotion or Termination

If performance does not improve upon the expiration of the PIP or if additional performance concerns arise:

• **Demotion** to a position in which the employee can potentially be successful

• **Termination**
Where We’ve Been

1. WHY performance management is necessary
2. WHAT a performance concern is + WHEN performance management is necessary
3. YOUR role in making an impact
4. HOW to administer performance management

Because PEOPLE ALWAYS MATTER!
Contact Information

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Thank You!