

Performance Management Seminar

Paul Tournier
President, TPD



People | Partners | Performance
HR & Workforce Solutions

Welcome

- Introduction - Paul Tournier, *President TPD*
- Registration Sheet on your table
- Questions – *#TPDperformance*
- Hard stop 9:30, on-going Q&A until 10:00
- Prizes – Best Quote, Best Photo

TPD – Full Service HR Provider

Workforce Solutions

- Staffing
- Recruiting
- Specialty & Executive Search

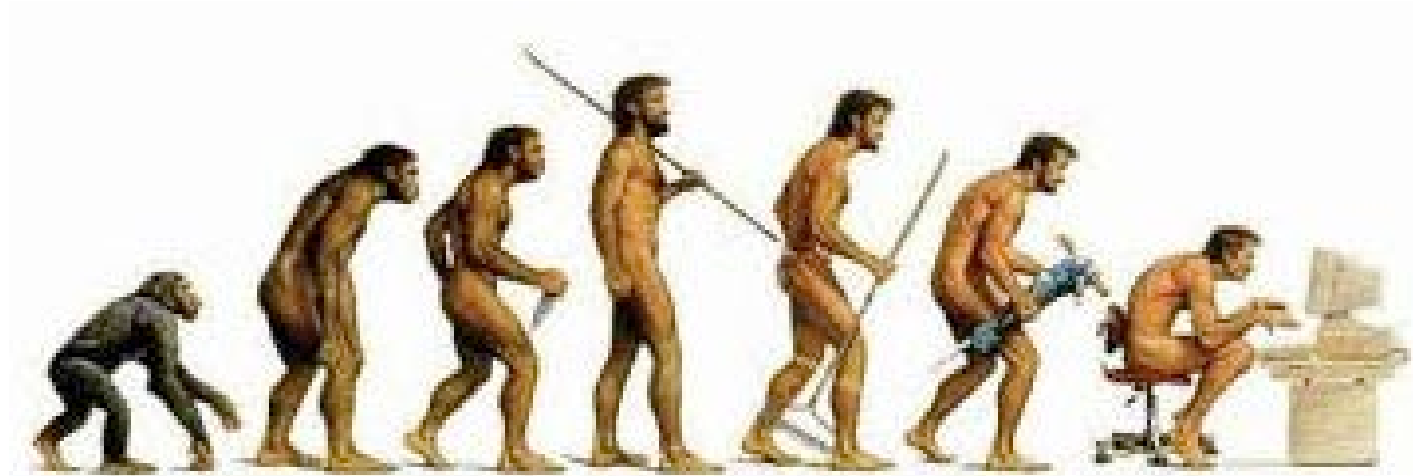
HR Solutions

- HR Outsourcing
- HR Consulting
- Payroll & Benefits Admin
- HRIS



We help people succeed.
We help companies perform.

Performance Management



Bersin
by Deloitte.



accenture
High performance. Delivered.

JUNIPER
NETWORKS

Performance Management - Panel

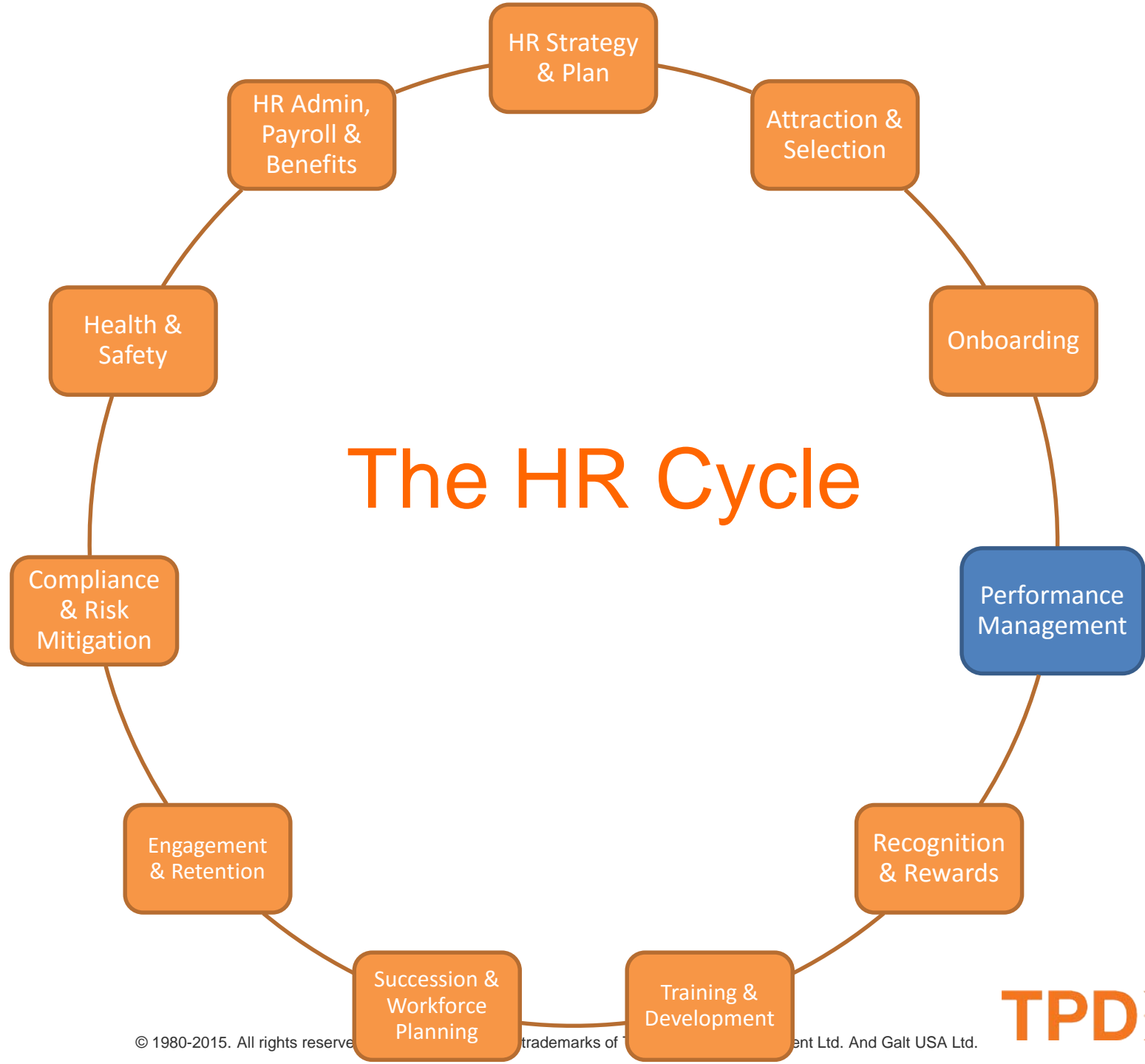
- Susan Alley – VP of Human Resources, TPD
- Taryn Mackie – Partner, Bull Housser
- Elena Smith – Lead HR Strategist, TPD

Fundamentals of Performance Management

Susan Alley
VP, HR Services



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Fundamentals of Performance Management

- Part of the HR Cycle
- Very important responsibility of every leader
- Simply means COMMUNICATION
- COMMUNICATION = DIALOGUE
- Starts at the opening interview before employment begins
- Expectations for success

Not and Annual Event!

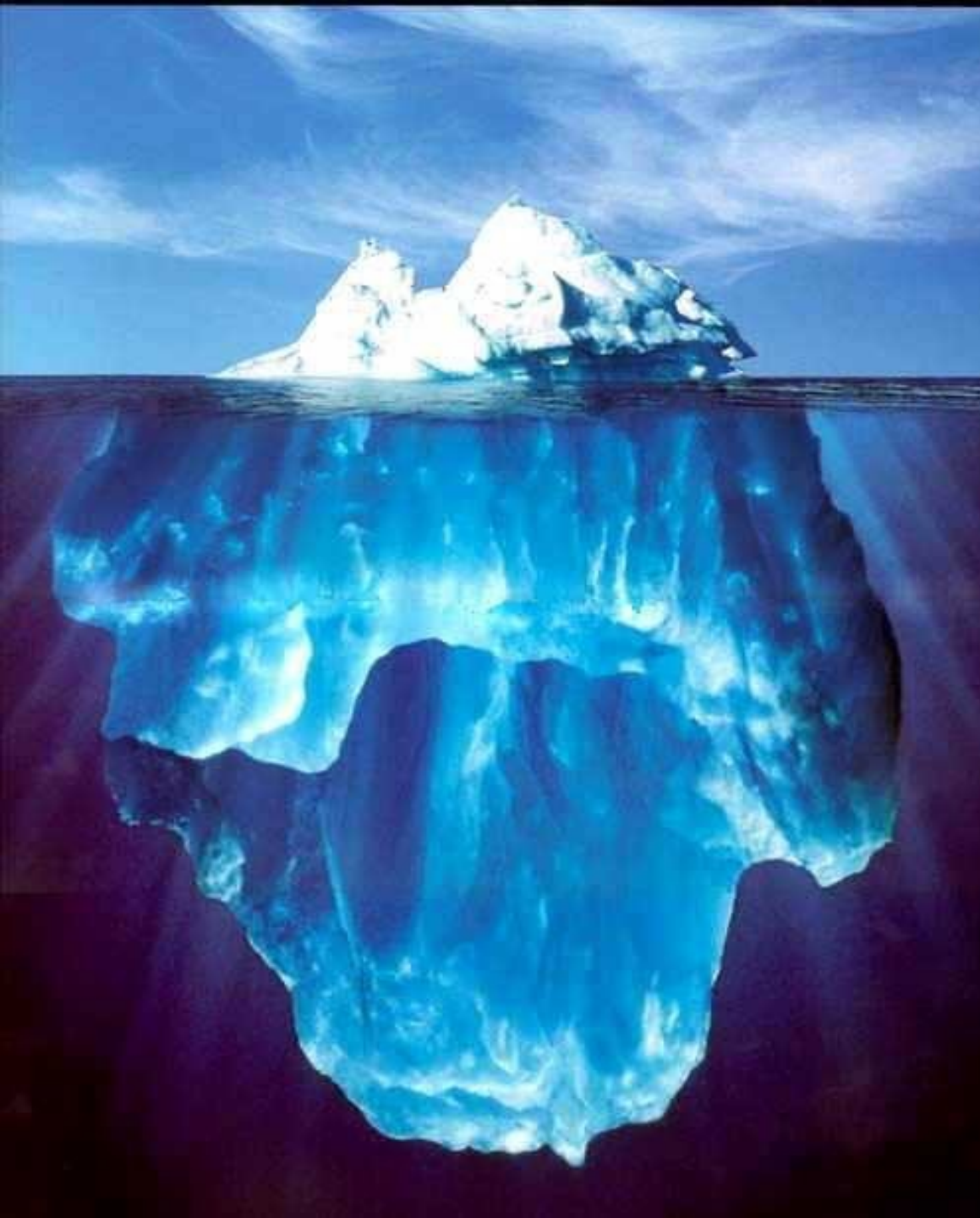
- Not a spectator sport
- Finance or Operations snapshot?
- Marathon vs. a couple of 2 km runs in a week

Formal Conversation

- When? Quarterly or more often
- Where? Private, quiet location
- Who? Leader, employee
- How? Consolidation of employee logged communication
- Why? Growth, improvement, recognition

How Can I Be Successful?

- Recognition – like to win: games, job, life
- Winning – coach the game while it is still in play; too late when it's over
- Talking/Active Listening – both your jobs



**Knowledge
Skills, Abilities**

Variable/Visible

**Personal
Characteristics**

**More
Stable/Hidden**



The Conversation!!!

The Conversation

- Formal conversation
- Can include a self assessment
- You are looking for evidence to support the self assessment
- Employees need to know exactly what it takes for them to succeed



Your Job!!!

Equal Participation

- Communication = Dialogue
- Demonstrate trust, empower your employees and actively listen to what they have to say
- Your job is to support, inspire, motivate; not micro-manage or abandon!



360 Degree Assessments.....

360° Assessments

- Self assessment
- Peers
- Direct Reports
- Leaders
- 360 ° of feedback
- More reliable

Setting Goals and Standards



GOAL

A statement of results that is to be achieved. It describes conditions that exist when the desired outcome is to be completed. A timeframe during which the outcome is to be completed. Resources the organization is willing to commit to achieve the desired result.



SMART
SPECIFIC
MEASURABLE
ATTAINABLE
REALISTIC
TIMELY



STANDARD

A standard refers to an ongoing performance criteria that must be met time and time again. Standards are usually expressed quantitatively and refer to such things as attendance, quality and quotas. They are most effective when established with the participation of those who must meet them.



The Importance of Documentation!

- PIN (Performance Improvement Notice) (PIP)
- Issue or Concern
- Improvement or Correction required
- Timeframe
- Consequence of Not Achieving Improvement or Correction

Performance Management: What it is NOT!!

Secret
Assessment



Salary
Negotiation



Disciplinary
Meeting



Watercooler
Discussion



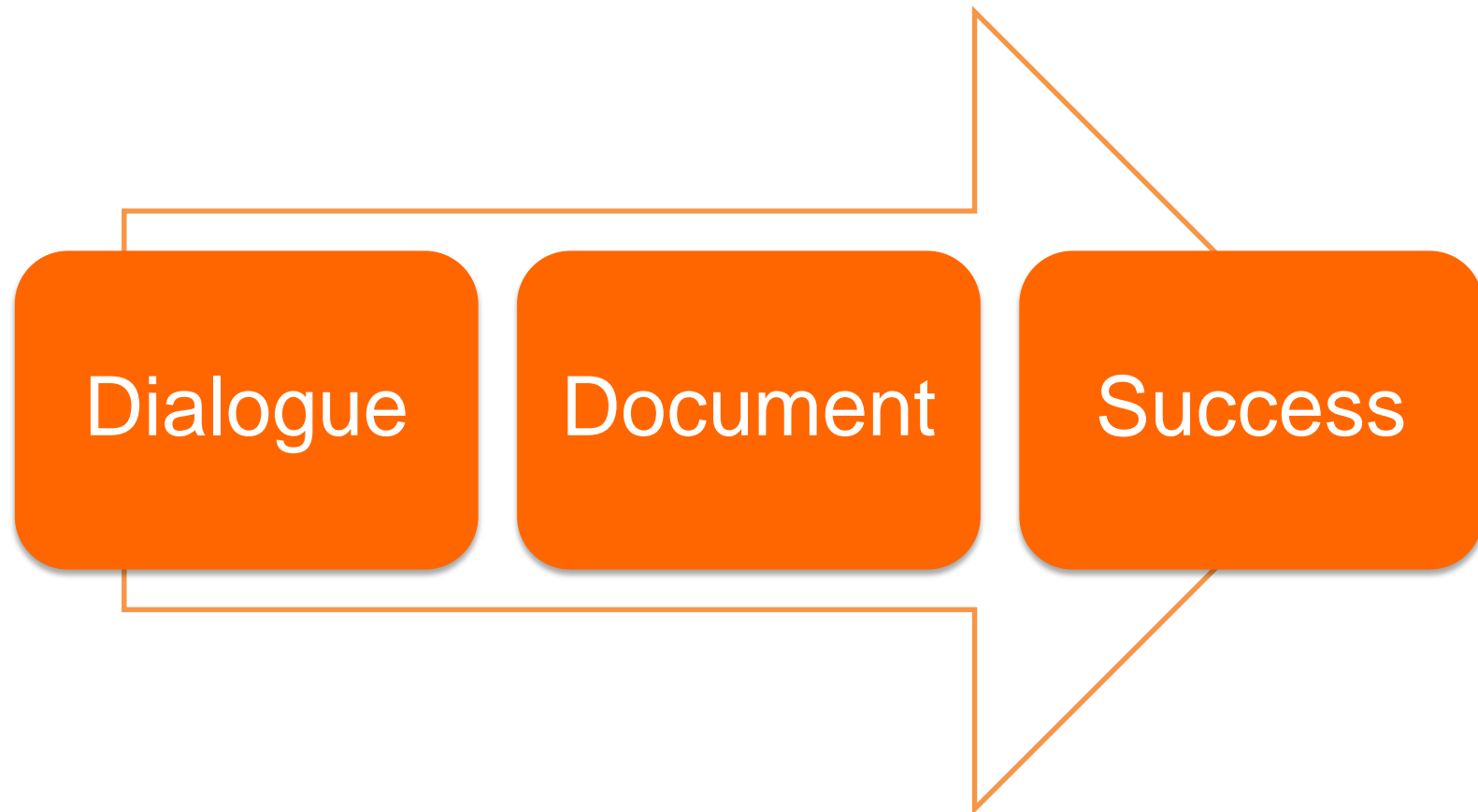
Popularity
Contest



Fundamental Areas of Performance Management

Measurement of Employee's performance against goals and/or standards	✓
Recognition of contributions	✓
Correction of performance issues	✓
Creation of new goals/standards for next appraisal period	✓
Development plan	✓

Conclusion





The Legal *Ins and Outs* of Top 3 Performance Management Issues

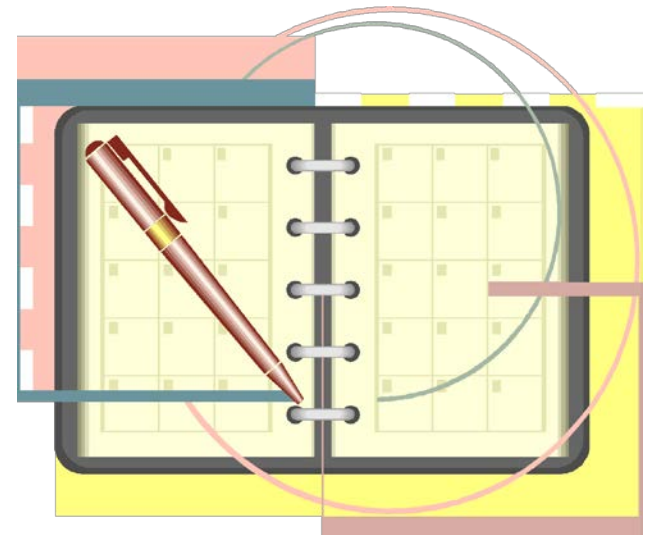


BULL
HOUSSEY

November 24, 2015

What's on the Agenda?

- **This Suits me Just Fine...**
Management of Probationary Periods
- **I Can't Help It...**
Medical Conditions and the
Duty to Make Inquiries
- **Ch-ch-ch-changes...**
Changing the Job &
Constructive Dismissals



This Suits me Just Fine...

Management of Probationary Periods

- A probationary period is like an **extended job interview** that allows you to assess whether an employee is **suitable** for your organization
- A properly managed probationary period means that you can terminate the employment for reasons of unsuitability **without liability** (i.e. severance)



Probationary Periods

- Traditionally, it was understood that an employer could terminate a probationary employee at any time for any reason during the probation period without any liability



Probationary Periods

- This is **no** longer the case
- **Test:** Employer must show that the employee is unsuitable for their position

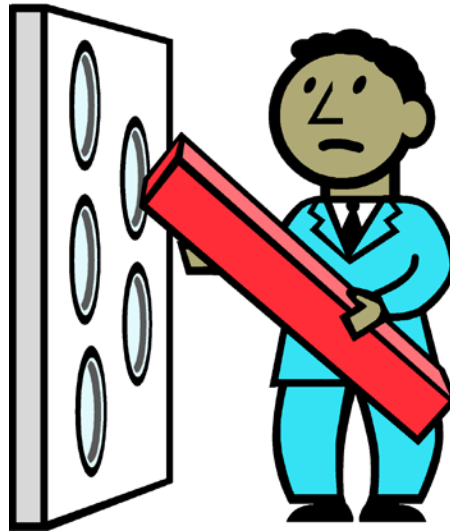


Probationary Periods

- Factors courts (and arbitrators) will consider:
 - Has the employee been given a **reasonable opportunity** to demonstrate suitability?
 - Has the employer shown that it had **proper reasons** for deciding the employee was unsuitable?
 - Was the employee given a **chance** to succeed?
 - Was the employee **aware** of the standards that had to be met?

Probationary Periods

- Suitability is not restricted to performance
- Fit matters!



Probationary Periods

- **Best practices** for employers:
 - Clearly communicated expectations
 - Good faith attempt to resolve issues
 - Provide training when available
 - Clear evaluations
 - Document, document, document



I Can't Help It...

Medical Conditions, Job Performance, and the Duty to Make Inquiries

- What happens when you know, or might reasonably suspect, that a medical condition may be causing poor job performance (e.g. poor attendance, poor work product, bad attitude, etc.)?
- Employers have a duty (under human rights) to make **inquiries** of the employee **before** taking any job-related consequences (e.g. disciplinary action or termination)



Duty to Inquire

- **Red flags:**
 - sudden marked changes in mood
 - tearfulness and expressions of hopelessness
 - withdrawing socially
 - change in physical appearance
 - symptoms of exhaustion
 - deterioration in the quality of work and
 - learning that the employee has been hospitalized or is in counselling
- **Don't be afraid to ask for medical information**



Create your own Medical Certificate

- Absent an agreement to the contrary, you do not need to be satisfied with the (unhelpful) prescription pad note
- You can create your own medical certificate that makes the inquiries you need to make to determine whether, and to what extent, accommodation may be required
- Ask what you reasonably require to assess the situation



What you *can* ask for?

- In general, you can ask for:
 - whether the performance issues are caused by a medical condition
 - the nature of the employee's illness or disability (i.e. recurring or chronic)
 - the employee's prognosis for full or partial recovery, expected date of return, and expected duration of absence
 - the employee's functional capabilities and limitations
 - whether treatment prescribed and followed
 - evidence that the employee is fit to return to work

Ch-ch-ch-changes...

Changing the Job & Constructive Dismissals

- Are you thinking of:
 - taking away job duties to improve employee performance?
 - changing an employee's reporting structure to get better management?
 - suspending an employee without pay as part of disciplinary action?



Ch-ch-ch-changes...

Changing the Job & Constructive Dismissals

- **Test**: An employer who **unilaterally** (i.e. without the employee's consent) **fundamentally changes** a significant term of the employment contract creates a constructive dismissal risk
- Allows employee to **resign** from their job and claim severance as if they were terminated without cause
- Fortunately there are **strategies to minimize risk**
 - Deal with the issue in the employment contract
 - Get buy-in from the employee (acceptance means no risk)
 - Give notice of the old terms ending and offer continued employment on the new terms

Q & A Period



Trends in Performance Management

Elena Smith, CHRP
Lead HR Strategist



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Moving Away From – Going Towards

Trends



Dan Pink's - Puzzle of Motivation



AUTONOMY

The urge to direct our own lives. To have the freedom to decide how and when to do our jobs.



MASTERY

To get good at doing something that really matters. We want to get better, to progress, to grow. Give people space, opportunity and support to grow.



PURPOSE

To connect to something greater than ourselves. To find meaning in our work.



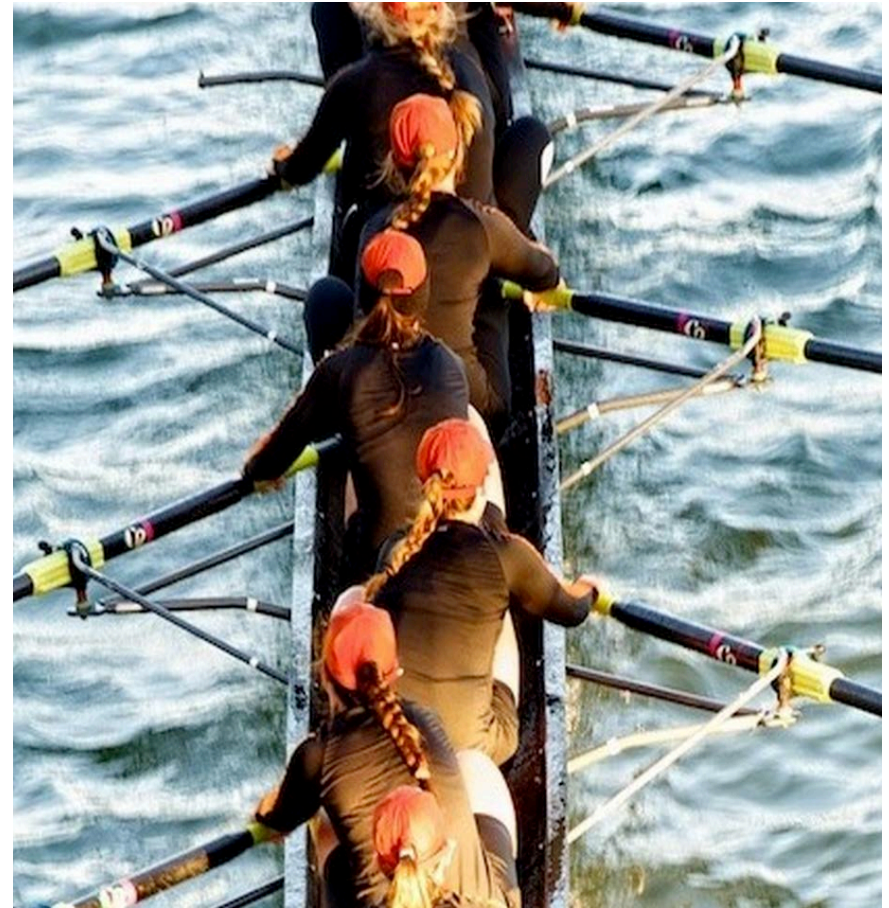
Key Motivators

1. Use your talents every day
2. Buy into a greater purpose
3. Career Growth
4. Flexibility
5. Engaged co-workers

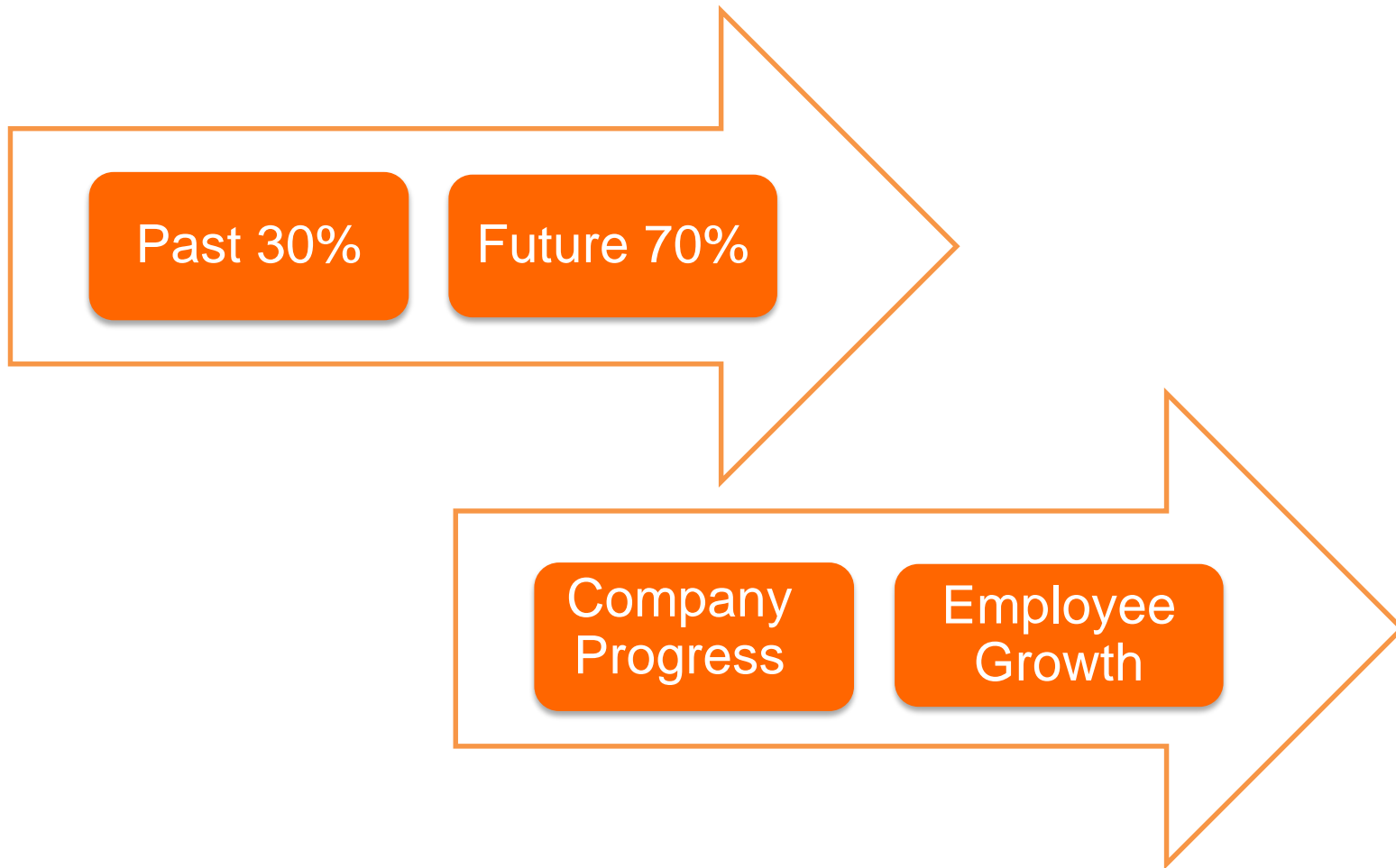


Purpose & Alignment

- Where & Why?
- Individual impact
- Common Goals
 - Individual & Company Goals
 - Look for overlap



From Appraisal to Developmental



Positive Measurement

No longer – Duties & Responsibilities

- Include in Job Description
- Revisit if poor performance

Now:

1. Behaviours /“Competencies”
 - Support results, values & progress
2. SMART Goals
3. KPIS/Performance Metrics

Annual Reviews to Culture of Feedback

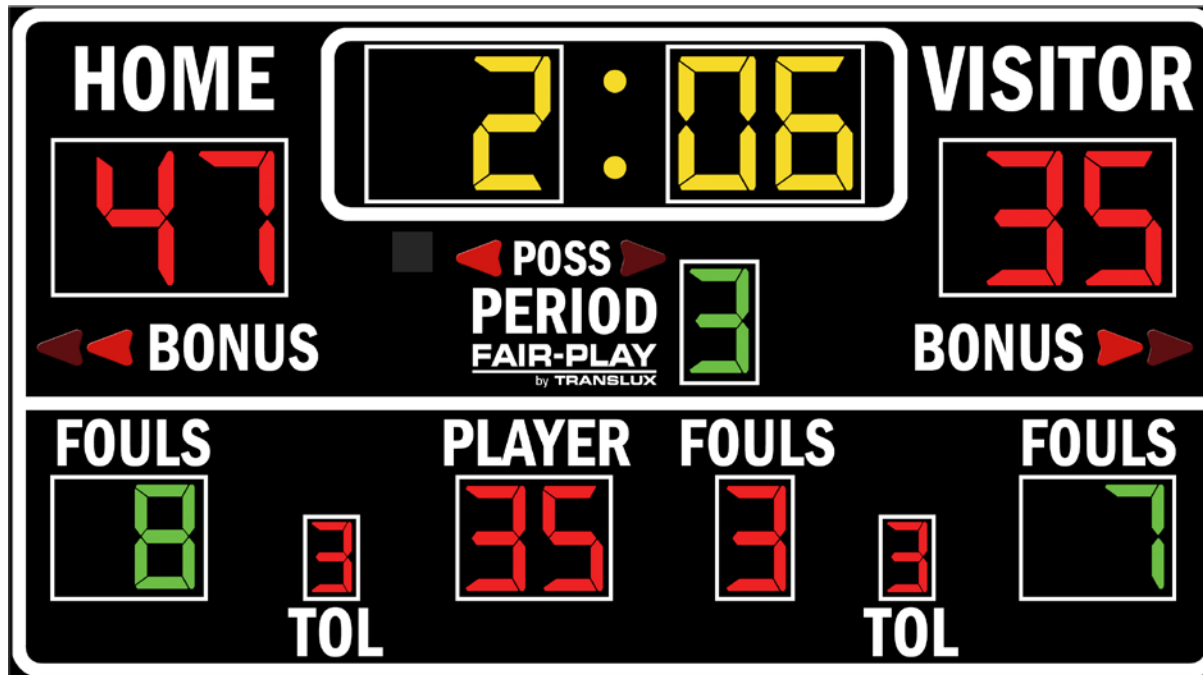
- Training giving feedback
 - 2-way feedback
 - How can I support you?
- Timely & Relevant
 - Annual SMART Objectives
 - 90 Day SMART Goals – max 3 goals
 - Weekly one-on-ones
 - (Monthly Check-ins)

From Salary Reviews to Total Experience

Competitive-salary Fun
Mentor Recognition Bonus
Auto-allowance Vacation
Benefits Supportive-colleagues
New-experiences Laptop Celebration
Meaningful-work Cellphone
Work-from-home Equity
Environment Development
Opportunities Growth

From Paper-Based to Technology-Enabled

- HR Information Systems
- HR Metrics - Data Analytics



Questions... until 10:30am



- Twitter: #TPDperformance
- Twitter Prizes – Best Quote, Best photo

Thank you...

