

Performance Management at Evidence Action

*A session for Line
Managers*

People & Culture
May - June 2024



evidence
action

People & Culture | May 2024



*In this training, I expect
to...*

LEARNING OBJECTIVES



Describe the purpose of performance to achievement of strategy



Understand how to use coaching in performance



Reflect on challenges faced in PM and how to navigate these



*Is there a gap between how your department is performing
and how you would like them to perform?*

HOW DO WE CLOSE THE GAP?





TRUE OR FALSE?

*A good strategy is the
key to a successful
organization.*



*A good strategy needs
good execution to
succeed*

HENCE PERFORMANCE MANAGEMENT

EvAc's Mission, Vision and Values

EvAc's Global Strategic Priorities

Regional and Country Priorities

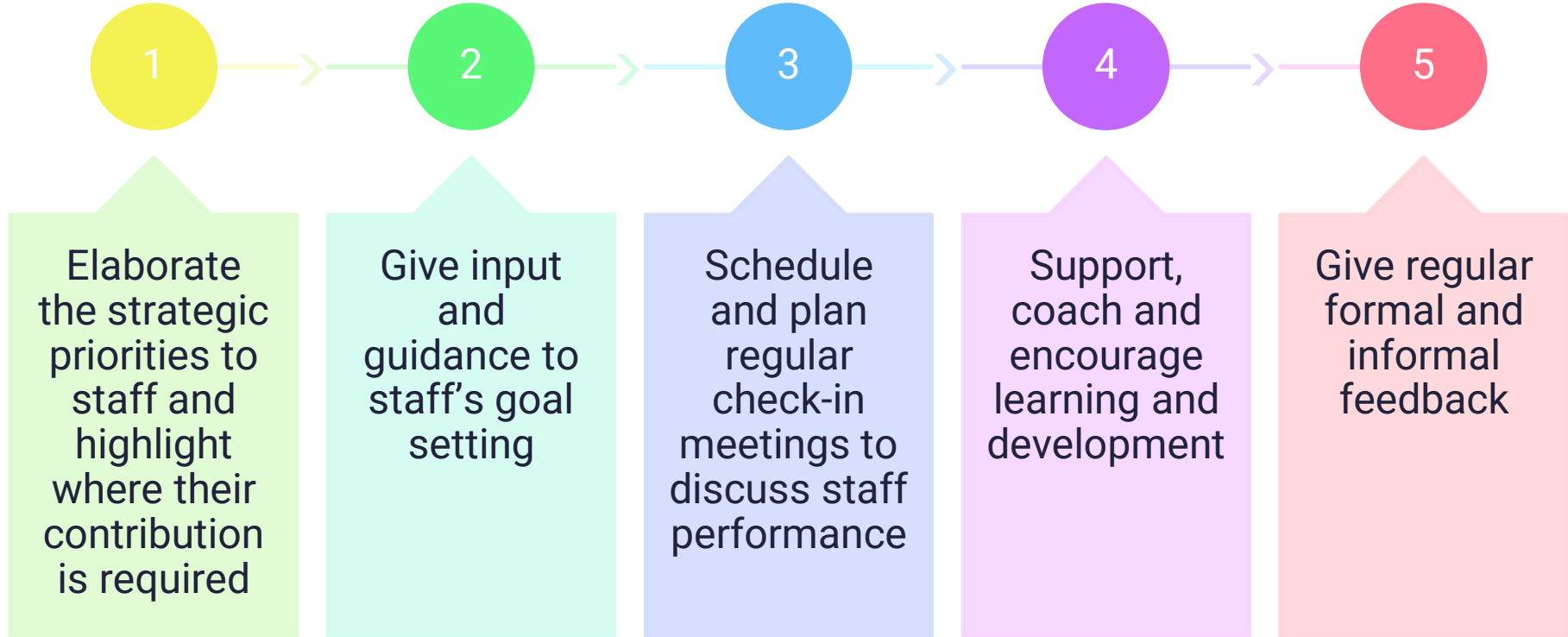
Functional/ Program Priorities

Individual Objectives

Daily & Weekly Tasks

- Ensuring there is a clear link between the work of employees and teams and Evidence Action's mission and goals;
- Aligning individual and team work plans with Evidence Action's mission and goals;
- Providing regular, objective, and fair feedback on performance;
- Recognizing and rewarding important achievements and excellent performance; and
- Providing opportunities for development.

ROLES AND RESPONSIBILITIES – LINE MANAGER



***WHERE DO WE GET PERFORMANCE
WRONG?***

1. GOAL SETTING

GOAL SETTING GUIDELINES

S	pecific imple	<ul style="list-style-type: none"> ▪ Clear definition? ▪ Easy to understand? ▪ Objective?
M	asurable	<ul style="list-style-type: none"> ▪ Easy and cost efficient to measure? ▪ Do we have or can we get a trend (time series)?
A	chievable ctionable	<ul style="list-style-type: none"> ▪ Can the team tracking the KPI influence it? ▪ Do we understand the underlying driver? ▪ Is it controllable? Can we have an impact on it?
R	levant	<ul style="list-style-type: none"> ▪ Is there a link to overall organisational objectives and targets? ▪ Does it support overall targets?
T	imely	<ul style="list-style-type: none"> ▪ When do we measure it? ▪ Can measured results be gathered (and affected) during the report cycle? ▪ On what horizon should the KPI be measured (snap-shot, weekly averages, daily accumulated, etc.)?

GOAL SETTING EXAMPLES

Performance Objectives	Activities	Target dates	Success Measures/ Indicators	Status / Results achieved
<i>What do I plan to achieve?</i>	<i>What actions do I plan to take to achieve the objective?</i>	<i>By when?</i>	<i>How will I know that I have achieved the objectives?</i>	<i>To be completed during review</i>
Build in-country capacity for basic troubleshooting skills in Processmaker system	<ul style="list-style-type: none"> Identify and train 2 IT and Finance staff per country Facilitate acquisition of rights from Global Office Provide continuous offsite support 	4 March	<ul style="list-style-type: none"> 75% cases logged and resolved at country level 	XXXXXX XXX
		15 April	<ul style="list-style-type: none"> Reduce number of support request to Region by 75% in 2024 	
		31 Dec		
Build in-country capacity for basic troubleshooting skills in Processmaker system	<ul style="list-style-type: none"> Ensure CO Finance and IT staff are able to resolve Processmaker cases 	4 March	<ul style="list-style-type: none"> Ability to resolve basic issues in country 	XXXXXX XXX
Lead and guide conversation on the harmonized implementation of Maternal Syphilis Program outputs and outcomes.	<ul style="list-style-type: none"> Understanding various Members stand-point and supporting them effectively to achieve goals in relation to Maternal Syphilis Program. Positive collaboration with AAH as supply chain lead, ensuring issues of supplies are addressed in timely and amicable fashion 	2 Jun	<ul style="list-style-type: none"> Maternal Syphilis Program issues and challenges are adequately flagged and sorted within various consortium groups. Effective and efficient supply Chain management 	

2. MISALIGNED UNDERSTANDING OF PERFORMANCE DESCRIPTORS

PERFORMANCE DESCRIPTORS

<i>Performance Rating at Evidence Action</i>		
5	Exceptional	Overall performance always exceeds role expectations , staff acts as a role model and significantly delivers performance and contribution that is consistently above peer group , while influencing others to perform better as well.
4	Above Expectations	Overall performance often exceeds role expectations and staff delivers high standard of performance and contribution relative to peer group .
3	Meets Expectations	Performance clearly and fully meets all the requirements of the position in terms of quality and quantity of work and staff delivers performance and contribution in line with peer group . Solid performance with thorough and on-time results. The Employee gets the job done well.
2	Below Expectations	Performance is noticeably less than expected. Overall performance inconsistently meets role expectations, staff delivers performance and contribution that is below the peer group norm. A Performance Improvement Plan (PIP) should be considered.
1	Inadequate Performance	Overall performance often fails to meet role expectations and staff delivers performance and contribution that is significantly below that of peer group . A Performance Improvement Plan (PIP) is required.

3. CONNECTING PERFORMANCE TO DEVELOPMENT

PERFORMANCE TO DEVELOPMENT

- Identify capacities and competencies that a staff needs to excel in their objectives during goal setting.
- Identify ways in which these competencies can be achieved – guide the staff to consult and research, feel free to mentor them at this point.
- Record and escalate these needs to P&C for your department/ direct reports.
- Follow up through the year that the needs are achieved through the different learning and development interventions available.
- Review the development goals alongside other KPIs in the mid year and end year review process.

****Learning needs identification rests within the staff and their line manager.***

THE GROW COACHING MODEL



WHAT IS COACHING?

Partnership between a coach and coachee in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

CDI Africa

WHAT IS COACHING?

Coaching is a discovery-based learning process

It is about self-initiated change, based on one's own experience and knowledge

Coaches seek to elicit solutions and strategies from the coachee, not ones based on the coach's own experience

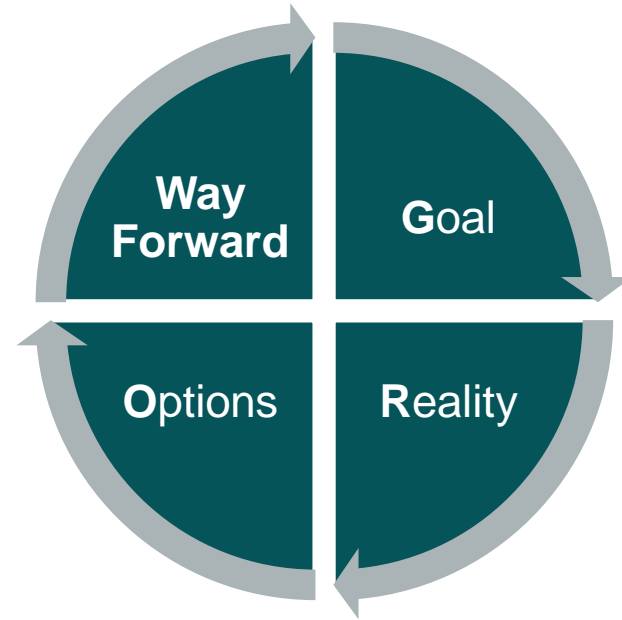
It is an exchange based on the coach asking questions, listening to the answers and building upon them

It requires active listening skills, encouraging and commitment

THE GROW MODEL

A simple four-step process

- **SMART Goal**
- **Current Reality**
- **Options** (and Obstacles)
- **Way Forward**



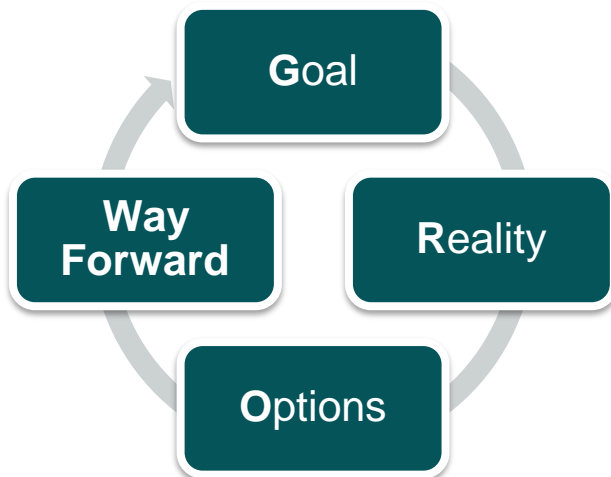
THE GROW MODEL

Goal

- What do you want to achieve?
- How will you know that you have achieved it?
- How does it fit with the team's and organisation's objective?
- What should be the outcome for this session?

Way Forward

- Which options work best for you?
- What one small step are you going to take now?
- When are you going to start?
- What do you need to succeed?
- Who or what can help you?
- When should we revisit the progress?



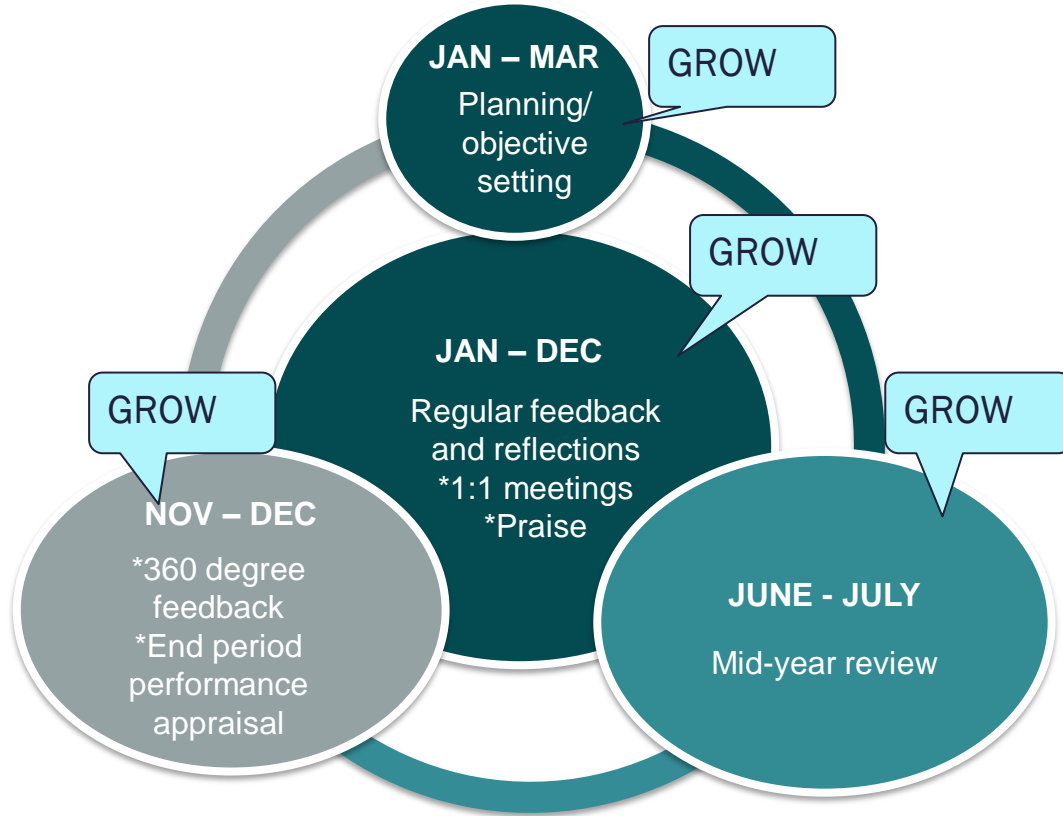
Options

- What can you do?
- What else can you do?
- What are the pros and cons of each option?
- What would happen if...?

Reality

- What is happening now?
- What is the effect of this?
- What steps have you already taken?
- What success have you had already?

THE GROW MODEL AND THE PM CYCLE



Identify and define relevant **GOALS**

Generate awareness and
understanding of the current
REALITY

Explore **OPTIONS** and build self-
efficacy

Decide on action ensuring
commitment and a **WAY
FORWARD**

GIVE THE WORK BACK

Make

- Make the staff take responsibility for their own performance and development

Help

- Help the staff be solution-oriented and come up with alternatives

Help

- Help the staff set concrete action points

Reinforce

- Reinforce initiative

EXERCISE/ ROLE PLAY

Teams of three

- One member is the staff
 - One is the line manager
 - One is an observer
-
- ✓ The line manager will take the staff through a 3.5 min performance coaching session and the observer will give remarks on what went well or not during the coaching.
 - ✓ Rotate the roles amongst you.

THE GROW MODEL

Remember...

Use open and thought-provoking
questions

Active listening

Focus on them, not you

Avoid giving advice

KEY MESSAGES



- ✓ Let the staff talk – 80/20!
- ✓ Be curious and ask open-ended questions
- ✓ Reinforce positive behavior
- ✓ Give the work back
- ✓ Always let the employee summarize what you agree on – the actions to be taken



CHALLENGES IN PM AND GRIEVANCE HANDLING



PERFORMANCE CHALLENGES

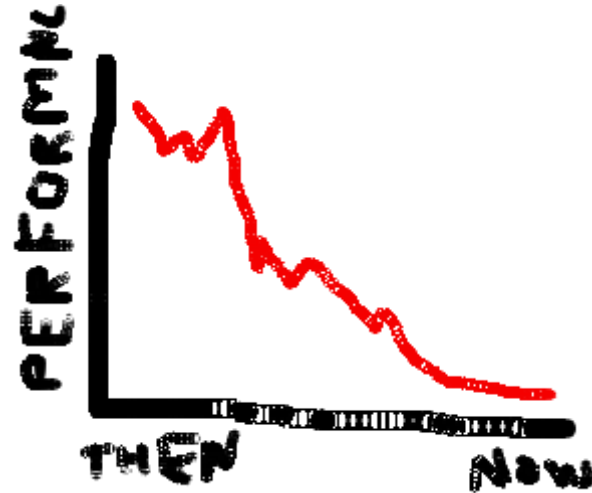


UNDER PERFORMANCE

Instances where a staff member is not performing to the level expected in their job.

Examples:

- failure to do assigned tasks,
- OR to meet deadlines
- OR to meet expected quality standards.



REASONS FOR UNDER PERFORMANCE



STEP BY STEP

COACHING

The Africa Regional Handbook outlines how to respond to underperformance. The steps below detail how to go about the process.

An employee who fails to meet expected performance standards; and scores a rating of 1 or 2 shall be part of a Performance Improvement Plan (PIP).

The PIP can be initiated at any point in the performance year as long as the line manager has noticed significant undesirable change in the staff's performance.

The PIP shall be developed by the line manager and the employee in consultation with the P&C Department, the second level and the secondary manager.

The PIP shall be for an initial period of three months, and can be extended for up to another three months after which a final performance review is conducted.

If a member of staff goes on any kind of leave for more than 5 working days during PIP, the duration of the PIP will be paused and continued upon return of the staff.

If the employee does not improve he/she shall be deemed to have no interest in the job and shall be referred to HR to institute the necessary termination processes.



Change Takes Time

Questions?

