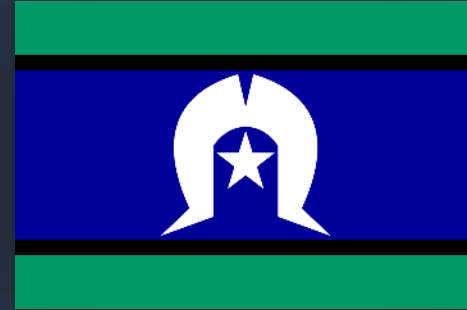


Maintaining the shift

Monitoring, Tweaking, Reflecting





QCROSS acknowledges Aboriginal and Torres Strait Islander people as the original inhabitants of Australia and recognises these unique cultures as part of the cultural heritage of all Australians.
We pay respect to the Elders of this land; past and present.

Session outline

- Understanding the HR strategic plan continuous improvement cycle
- Driving the HR plan through individual and team performance
- Designing individual and team success indicators
- Implementing and celebrating a robust performance and continuous improvement management system



Continuous Improvement Cycle

The continuous improvement cycle is a structured approach to constantly improve processes, services, and outcomes within an organisation.

The goal of the continuous improvement cycle in this context is to identify opportunities for improvement and progress toward achieving your HR plan objectives.

The process is repeated continuously, in order to make further improvements and to achieve ongoing, incremental gains in performance.

Using the theory of change model

- The theory of change (or logic model) is often used in NFP's to map organisational inputs, activities, outputs, impacts, and outcomes
- HR plans and goals often overlap with the organisational strategic plan and goals; therefore, this approach ensures consistency and serves both purposes
- The approach can be applied to any project, service, or program
- All logic models conclude with your outcomes for clients. This is important for HR managers as it keeps client and service priorities at the core of all activities

Exploring Program Logic



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Setting up and reviewing your HR plan logic model

Inputs

- Financial
- Staff
- IT infrastructure required
- Intellectual property etc.



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Activities

- Buy learning management software
- Increase diversity representation
- Create new policies etc.



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- Progress percentages
- Data or metrics related to activities i.e. training sessions run, policies developed etc.



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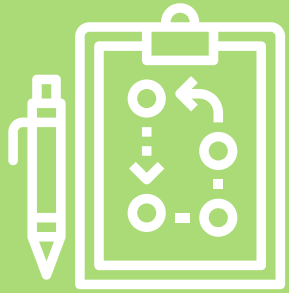
Outputs

- Performance metrics
- Progress percentages
- Data or metrics related to activities i.e. training sessions run, policies developed etc.

Impacts

- Did performance improve?
- Did employee satisfaction increase?
- Did knowledge increase?
- By how much?





Outcomes

Organisational outcomes should be defined in your organisation's strategic plan, and usually include client satisfaction ratings, employee wellbeing results, and service delivery outcomes relating to social impact.

As with output, the HR plan manager will need to reflect upon these to ensure the HR plan's program logic is aligned and delivering on its stated objectives.

Whiteboard Exercise

What are some examples of how HR strategies (activities) can contribute to service and client outcomes?

HR plan success indicators

- Turnover rate
- Time to hire
- Cost per hire
- Absenteeism rate
- Employee engagement
- Compensation metrics
- Training and development ROI
- Diversity and inclusion metrics
- Health and safety metrics
- Succession planning metrics
- HR service delivery metrics
- Performance metrics

Poll

“In my organisation we are capturing the following workforce data and analytics that reflect our strategic goals.”

1. Turnover rate
2. Time to hire
3. Cost per hire
4. Absenteeism rate
5. Employee engagement
6. Compensation metrics
7. Diversity and inclusion metrics
8. Health and safety metrics
9. Succession planning metrics
10. Performance metrics

Embedding performance locally

Ensuring your HR plan is embedded in daily employee 'business as usual practices' generally involves developing or tweaking your:

- Performance management policy
- Established goals and outcomes at both the team and individual levels
- Job descriptions
- Team meetings and training
- Performance coaching
- Underperformance approach
- Reward and celebration program

Performance in the not-for-profit sector

Performance management as a field of research and application is universally accepted, however, there are some distinct differences in the NFP sector to consider when designing or tweaking performance related policies and practices.

- Impact and performance in NFPs is often more difficult to measure compared to financial or easily quantifiable outcomes e.g. number of widgets sold to make x amount of profit
- At times NFP's have purpose statements and goals that will likely never be fully achievable or measurable (e.g. solve world hunger), or have goals that will take many years to achieve.
- Sometimes, there is a perception that for-profit sector methodologies are misaligned with values-based sectors' ways of working. This is not always true, and some of the strategies that have been pioneered and refined in for-profit industries can benefit NFP's greatly

Consideration for the not-for-profit sector

Transferability: any performance program or approach adopted from the corporate sector or body of HR literature (mainly developed in a corporate context) must be screened for transferability. This includes:

- Language appropriateness
- Cultural appropriateness
- Contextual appropriateness

Consideration for the not-for-profit sector

Acceptability: the key question to be posed of any performance program or approach is: will all levels of my organisation including leadership, employees, clients, funders, and other stakeholders accept this approach in action?

Poll

“In my organisation we have a performance management framework in place.”

- a) Yes
- b) No
- c) Partially
- d) Not sure

Policy Design

In order to develop or review a performance policy that is accepted at all levels of your organisation, some key considerations include:

- Involve stakeholder feedback and get stakeholder buy-in
- Use clear and concise language
- Ensure accessibility
- Ensure consistency with other policies and strategy
- Ensure both reward systems and systems for underperformance are outlined
- Follow up with workshops or team meetings
- Ensure a reporting system for performance reviews is outlined

Setting team and individual success plans

- Before setting or adjusting team and individual success plans, ensure all teams attend a workshop and/or focus group outlining what is involved
- Explain how to set effective performance goals (SMART)
- Highlight the benefits of setting performance goals (increased autonomy and flexibility)
- Explain and align the program logic with employee and team performance plans

Setting team and individual success plans cont

- Use measures and metrics
 - Both are usually focussed on the activity and output levels of the program logic
 - For example, they may focus on the number of applications processed or clients visited per week
 - They do not usually talk to the quality of the work
- Use outcomes as success indicators
 - Usually focussed on impact and outcomes
 - These serve as superior measures of performance overall
 - For example, client satisfaction ratings and completion of projects on time are more likely to indicate that the work being conducted is impacting the HR plan or broader strategic plan
- Consensus is important but not vital

Performance plan reviews

- Performance plan reviews are usually conducted as 1:1 sessions and involve a regular (monthly or quarterly) review on progress
- Performance reviews usually consist of:
 - Job responsibilities and performance expectations
 - Performance measures and metrics
 - Success indicators
 - Performance feedback and coaching
 - Development around goals and opportunities
 - Rewards and recognition
 - Performance improvement plan (if underperforming)

Team success indicators

- Team success indicators are a collation of all the team members' success indicators
- Team success indicators are developed simultaneously with individual success indicators
- Select the top five success indicators for each team and use these for reporting up to senior management
- They can also be added to standing team meeting agendas. This helps keep them relevant and important
- Teams can benefit greatly from tracking and visualising their results (using TV monitors, newsletters, posters etc.)

Safe and inclusive feedback and coaching

How performance plan reviews are conducted is pivotal to ensuring your program objectives do not derail. Managers and leaders must ensure they:

- Avoid conscious and unconscious bias
- Account for cultural differences
- Consider accommodations for abilities
- Be mindful of language and terminology
- Consider the impact of systemic barriers
- Be consistent with your ratings of performance (avoid favouritism)
- Be accountable and encourage accountability

Breakout rooms

How do you create a safe space that is positive, inclusive, fair, and constructive when you hold a 1:1 performance review?

(e.g. consider preparation, location, timing etc.)

Please discuss in breakout rooms for 10 minutes and share your thoughts with the group after (optional)

Whiteboard Exercise

Sharing the outcomes
of the breakout rooms

Framework for performance reviews

- While there is no one way to approach performance reviews and feedback, the 'coaching' style of leadership has been shown to be highly engaging and less intimidating for employees
- Performance systems work best when all managers, employees, and volunteers adopt a similar framework for approaching reviews
- One example framework is the highly researched strengths-based approach

Soft drivers of your HR plan

- Leadership competencies
- Consistent standards
- Emotional intelligence
- Coaching and mentoring
- Regular feedback

Characteristics of good feedback

- Strengths-based
- Asking questions
- Listening
- Timely
- Specific, relevant, and recent examples
- Factual and based on observations
- A two-way process

Putting it all together

- Ensure you have a clear method for tracking and reporting
- Ensure performance data is routinely presented to the board and senior management for discussion.
- Promote relevant results externally and internally
- Act on underperformance
- Celebrate successes at every opportunity

Thank you

Join us in our upcoming session

“Attracting candidates”

qcooss

