

Memorable Appraisals

Our Top Tips for Meaningful Development Conversations

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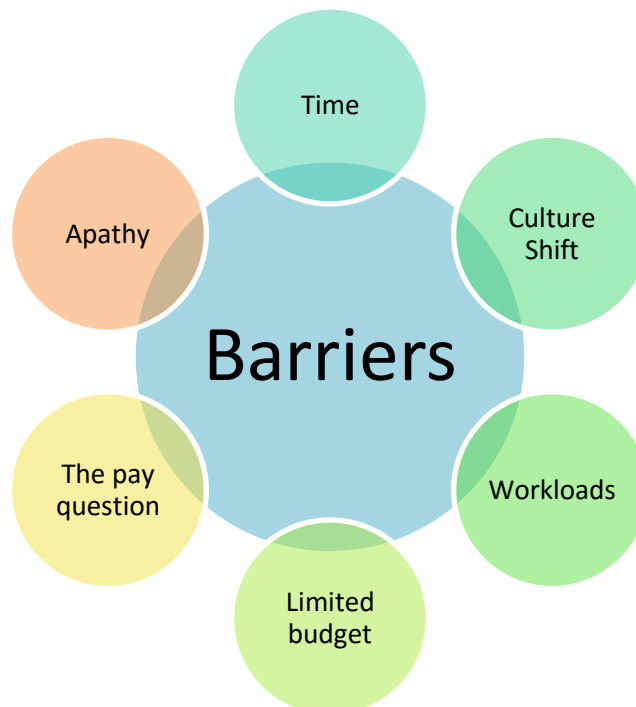
The Need – Just Ticking the Boxes?

Traditionally, appraisals have been seen as a performance management (rather than development) tool, that place their focus on the past. What this can mean is a lack of resonance for the appraisee to their current circumstances (which in the charity field, can change rapidly). When appraising staff, the first need is to break down the barrier of the session being a “tick box exercise” – a piece of paper to be placed in a drawer, returned to next year, soon forgotten, with no practical application. There can be a tendency for over-reliance on abstract strategy, which if not rooted in existing workforce engagement, and translated to day-to-day experience, can feel too distant and remote to map to individual performance and values.

Key words to bear in mind when approaching appraisal conversations are “resonance” and “meaning”. Making the appraisal a “live” document that is returned to and embedded into every day practice. Is the appraisal part of a wider development culture in your team which is discussed in team meetings, supervisions, training workshops? Or does it feel like an isolated exercise?

Regardless of the paperwork used, the most important aspect of appraisals is always human interaction – the conversation that’s facilitated, the coaching style that allows the appraisee to hear constructive feedback, and the open approach that allows for two-way critique.

Common Challenges



Time

- Carving out quality time for appraisals is crucial - avoid times you'll likely be distracted - consider using a different space outside of your normal office environment.
- Finding time can feel difficult, but the reward for investing time in developing staff short term is long term retention, engagement, and willingness to go above and beyond.

Culture Shift

- Different organisations (and teams) have different "learning cultures" and change needs to be gradual to be effective. Engaging appraisals can act as a pleasant, gentle challenge to the status quo if your team are struggling to prioritise learning and development activity.
- Appraisals form a part of the wider culture where you work - is it a culture of continuous feedback? Is learning prioritised and valued?

Workloads

- Workloads will inevitably arise as part of the appraisal conversation, and it pays to acknowledge and hear this, avoiding any tendency to dismiss or avoid.
- If the appraisal starts with the staff member feeling heard, it follows they will be more open to hearing your feedback as their manager.

Limited Budget

- You likely have a world of internal resource at your fingertips to help you develop a comprehensive training plan around appraisal cycles
- Make use of workshops, briefings, team meetings, and internal communications to create a buzz in your organisation/team about the upcoming cycle
- Involve staff in the creation and review of appraisal templates - your workforce come with a wide array of skills, talents, and specialisms - include them in the conversation!

The Pay Question

- At WDP, we feel the appraisal is a potentially related, but ultimately, separate conversation from that of pay
- Appraisals are largely a developmental tool and a chance for staff to reflect on their practice, with feedback from their manager
- At WDP, we do not operate performance related pay, but there are a multitude of other ways to reward high performance, by way of tangible CPD opportunities

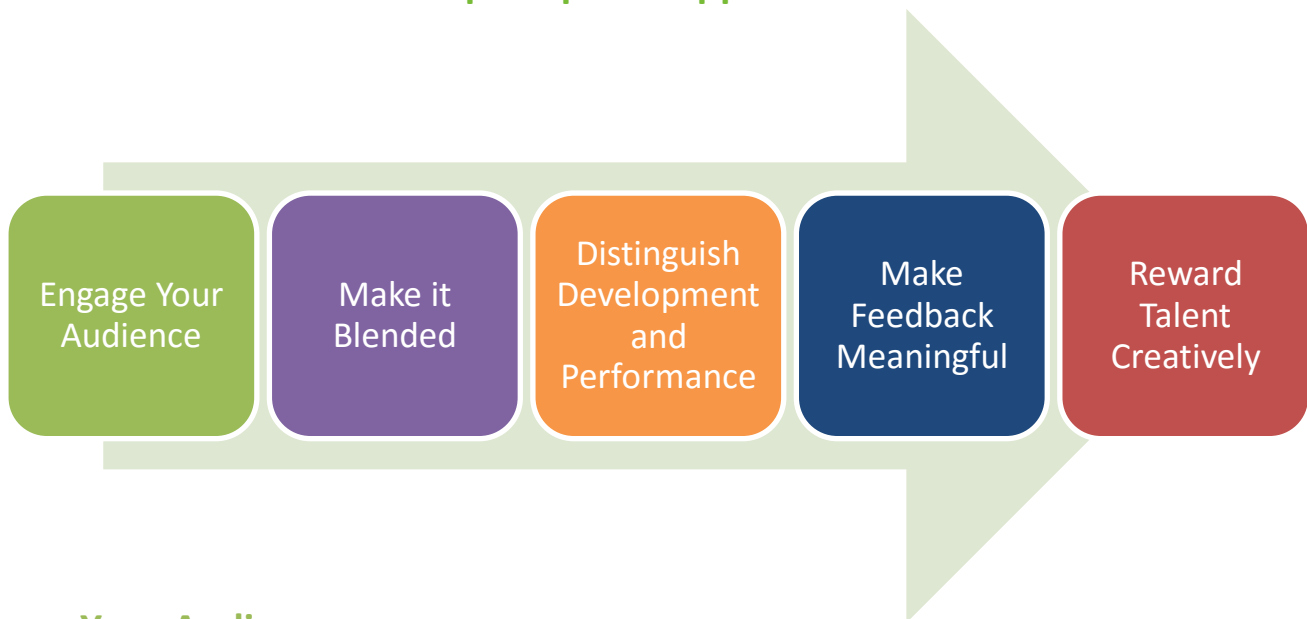
Apathy

- It is natural for some staff to feel disconnected from the appraisal process if they have had negative experiences before.
- Work with, not against, this, to determine what it was that didn't work for them last time around - you may not have scope to influence appraisal templates in your remit, but you can address how the appraisal is articulated and adapted for the individual

Our Approach

- WDP's L&D Team emphasise a shift to focus on behavioural and attitudinal competency – we believe it is people and behaviours that underlie truly great performance. These are the fundamentals – technical ability and knowledge can be learnt, but behavioural aspects are harder to influence. (“Will vs Skill”)
- Appraisals should be two-way conversations, mutually beneficial to the appraising manager and appraisee, seeking input from the individual
- Research shows a strengths-based, coaching approach, that focuses on questioning over telling, has repeatedly been proven as more effective
- Appraisals are an opportunity to address succession planning and talent recognition, to future-proof your team. Reward must feel “tangible”, with visible benefit not just to the organisation
- We believe horizontal as well as vertical development is an overlooked area, and want to encourage our managers to think about how they can support staff into specialisms, as well as management promotions

Our Top 5 Tips for Appraisal Success



Engage Your Audience

- Embed discussion of strategy in “lived” role experience, over abstract theory – how do strategic messages resonate with this individual’s actual job?
- Start your message early – get staff thinking about appraisals well in advance – give them time to process the concept and gather their thoughts, so they bring meaningful insight
- Acknowledge that priorities will differ across roles within the organization – your message needs to connect at least in part, to theirs, to bring staff on board. How can you translate your strategic appraisal vision to the frontline context?

Make it Blended

- Treat the appraisal as a “live” document – keep the conversation going in other arenas, such as team meetings, supervision sessions, and training spaces
- Consider how you can use a blend of internal resources to create a “learning culture”, whereby informal professional feedback continues as a central element of day-to-day practice
- Provide the organisation (and team) with FAQ-style resources to familiarise the team with appraisal principles, and reiterate key messages

Distinguish Development and Performance

- Balance clear performance expectations with visible development opportunities
- Don’t fall into the trap of assuming all successful performance relates to KPIs and targets – how might the staff member be performing well in other ways? For example, are they influential in a positive team culture? Have they taken the lead on a project? Are they a specialist?
- Invest time in retaining your top performers by allowing space for their aspirations and goals
- Consider how you can be creative with developing skills gaps? (Coaching, buddying, shadowing, skills swapping?)
- Follow both performance and development conversations up – commitment to performance is encouraged by a commitment to development

Make Feedback Meaningful

- Be specific, factual, and constructive in your feedback – tackle difficult conversations head on with clear examples, and equally, provide context to praise
- Separate fact from opinion – check your own biases and assumptions before addressing points for improvement
- Reflect and observe – phrases starting with “I have noticed...” offer the opportunity for clarification
- Take a coaching approach – less advice, more questioning – empower staff to find their own solutions

Reward Talent Creatively

- What does reward look like to this person? (It may be different to your vision)
- What time can be committed to making this happen?
- Is now the right time? If not – why not and when can this be reviewed?
- Consider opportunities across the organization – working groups, committees, events, CPD courses, secondments
- Consider hidden roles – admins and senior managers are overlooked groups – what development pathways are open to them?

Further Reading

Managing Performance – Michael Armstrong & Angela Baron (2005)

Performance appraisal and Management: The developing research agenda – Clive Fletcher (2001)

Performance Management Effectiveness – Practices or Context? Hainess & St-Onge (2012)