Evaluating Employee Performance In a Hybrid World

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Discussion Agenda

- Current Employment Landscape
  - Changes & Trends

- Policies
  - Remote & Hybrid Workplace Policies
  - Process/Structure
  - Accountability/Expectations

- Hybrid Performance
  - High Performing Work Teams – Common Characteristics
  - Performance Cycle
 - Types of Performance Discussions

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Discussion Agenda

- Hybrid Performance Management Process
  - Setting Goals
  - Communication
  - Discussion
  - Learning & Development
  - Monitoring
  - Rewards
  - Managing Inequities

- Resources

Employment Landscape

- As we all know, the workplace landscaped has changed in the last 2 ½ years.
- Organizations now challenged with decisions to make hybrid work & flexible work schedules while balancing the unpredictability of our current economy.
- Multi generational workforce
- Leadership required to manage, coach and support teams in different types of work schedules.
- Training managers/supervisors to evaluate and lead teams in different work environments.
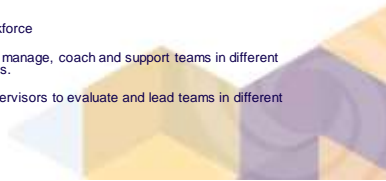
HYBRID WORK POLICIES

- Creation of policies
- Process for employee requests
- Process for approval
- Expectations for employee
- Expectations for managers/supervisors
- Accountability

Policies

- Organizations should have defined policies in place for employees who:
  - Work in office 100%
  - Work remotely 100%
  - Hybrid Work

- Eligibility

- Employee request form & approval process

- Please reference attachment files providing sample policies.

Define

- **Work Arrangement Options and Expectations:**

  - Does the employee need to come into the office once a week, or only for key meetings?

  - Should the person in this position be available during certain hours? Do their available hours need to align with a particular time zone?

  - What does "being available" mean?

  - How will projects be assigned and deadlines determined?

  - Is there a checklist for all the critical tasks associated with this position?

  - What is the standard required turnaround time when replying to emails and telephone calls?
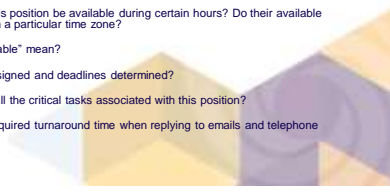
Expectations

- Accountability – ties to performance

  - Ensure accountability measures in place for managers and employees.

    - Examples:

      - Maintain meetings/discussions as scheduled.
      - Adhere to established timelines and deadlines.
      - What is documentation to ensure these tasks happen?
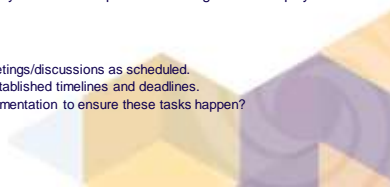
High Performing Work Teams

- **What are common characteristics?**

  - **Purpose**
    - Identify each individual's goals as they are aligned to organization and team goals.

  - **Roles**
    - Define how individual's roles & duties contribute to success and growth of teams.
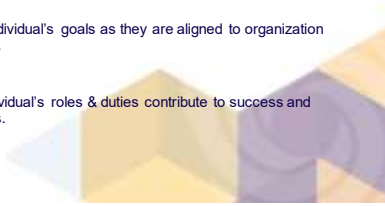
High Performing Work Teams

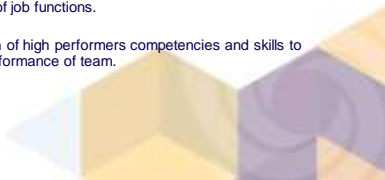- **Timely Conflict Resolution**

  - What is process for employees to report workplace issues?

  - Is there a consistent timeline of contact from manager/supervisor as to report of concern. i.e. 24 hours

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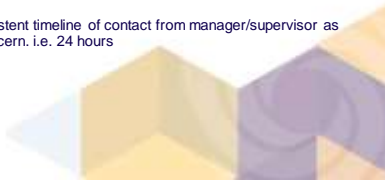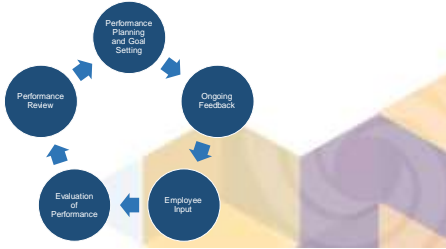
High Performing Work Teams

- **Talent & Skills**

  - Recruitment & retention of key talent with essential skills and knowledge of job functions.

  - Identification of high performers competencies and skills to assist in performance of team.

The Performance Management Continuum

Performance Planning and Goal Setting

Ongoing Feedback

Employee Input

Evaluation of Performance

Performance Review

Types of Performance Discussions

Appraisal	**Management**
One-time event	Ongoing
Retrospective	Prospective
Short-term	Long-term
Correction-oriented	Progress steps
Assigning ratings	Planning/goal-setting

Program Structure

- Assessments should include 360-degree feedback.
- Request self-appraisals from employees to be completed two weeks prior to the appraisal meeting.
- Consistent established check-in's
- Goal setting discussions & quarterly goal progress checks
- Recognition
- Project reviews & feedback

Setting Goals and Objectives

🔹 Define and establish specific goals and objectives for the review period.

🔹 Use SMART goal criteria:
   • Specific
   • Measurable
   • Achievable
   • Relevant
   • Time-bound

Setting Goals and Objectives

🔹 Align goals and objectives with the organization's business plan.

🔹 Establish mutually agreed-upon goals between the employee and manager.

🔹 Establish milestone review dates.

🔹 Communicate changes or redirection of goals and objectives in a timely manner.
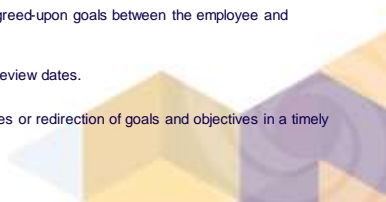
Communication

🔹 Enable teamwork/collaboration and team check-ins by scheduling 5-10 minute breaks during meetings for "hallway" chats among employees.

🔹 Utilize technology such as video conferencing to help maintain an "in- person" connection.

🔹 **Be deliberate and consistent in communication methods and channels**.

🔹 People need to feel they are accepted as part of the group.
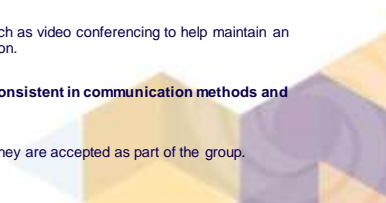
Performance Discussion

🔹 Hold performance evaluation meetings in a neutral environment free of noise and distraction (virtual and physical environments).

🔹 Begin with positive feedback; Constructive feedback is more widely accepted if prefaced with positive feedback.

🔹 *Focus on employees' output* – what they did well and accomplished, or what they missed or didn't complete.

🔹 Be cognizant of your own rater bias; Evaluate performance based on measurable result.
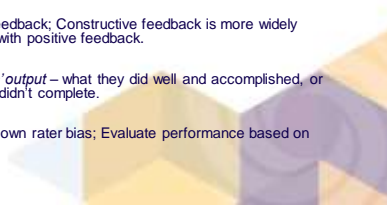
Learning & Development

🔹 Implement routine check-ins for 2-way and 360-degree developmental updates; Should be bi-directional and encourage constant development.

🔹 Offer and encourage online learning and free training programs from other agencies, job-specific associations, and local universities or partners.

🔹 Establish or promote mentoring, coaching, and detail opportunities to link employee goals and development.

Rewards & Recognition

🔹 How would your employees prefer to be recognized?

🔹 Recognize employee contributions tied to organizational values (not just productivity and performance).

🔹 Celebrate individual and team success throughout the year.

🔹 People want to feel appreciated and know they are contributing to the success of the organization.
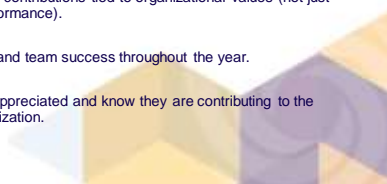
Monitoring

🔹 *Demonstrate inclusion* to employees through thoughtfully providing performance feedback using inclusive language.

🔹 Engage employees through multiple informal and formal feedback sessions throughout the year.

🔹 Check your assumptions (especially if your employee has been working remotely) on why the employee has or hasn't been performing.
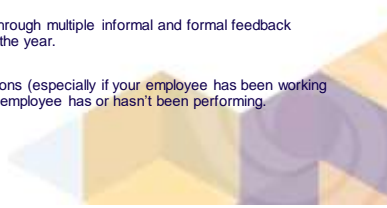
Inequities

🔹 Potential inequities between remote and in-office employees is top concern for many employers.

- *A key driver of proximity bias is the antiquated assumption that people are more productive in an office environment than at home.*

🔹 Examples of proximity bias include:
- Evaluating the work of onsite employees more highly than remote employees regardless of objective performance metrics.
- Offering the most interesting projects, assignments or development opportunities to onsite employees.
- Excluding remote employees from important meetings or not encouraging them to speak up on calls.
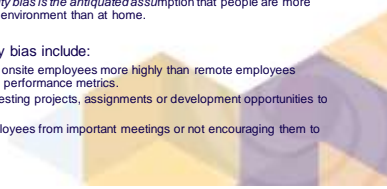
Case Scenarios

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Questions

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Content Resources

- Society for Human Resource Management
  - www.shrm.org
- Gallup Research Reporting
- Bureau of Labor Statistics, www.bls.gov
- LinkedIn.com
- https://www.microsoft.com/en-us/worklab/work-trend-index/great-expectations-making-hybrid-work-work
- *Remote Work is Here to Stay And Will Increase in 2023* (Forbes.com)
- *How the Future Works: Leading Flexible Teams to Do the Best Work of Their Lives* (Ascent Audio, 2022)

Thank you

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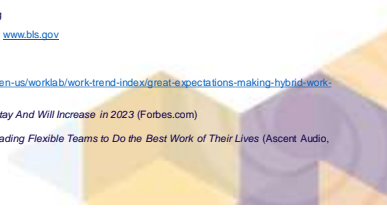
Workplace experts say managers can't simply take their feedback and review processes from before the pandemic—or from the onset of the pandemic—and adapt them to the emerging hybrid workplace. "We're going to have to create a whole new series of approaches and processes to make it work," Kropp said.

Some managers scheduled too many Zoom check-in meetings as companies shifted to a completely remote setting earlier in the pandemic, Kropp said. He noted that managers discovered that remote feedback meetings several times a week made workers feel as if they were being micromanaged and managers didn't trust them. Having a weekly one-on-one virtual meeting for 15 minutes or a half hour may be "all that is needed to provide clarity of priorities and commitments and building trust," Elliott said.

But Ben Wigert, director of research and strategy in Gallup's workplace management division, says that more frequent, five-minute informal "quick connect" meetings help workers understand that they are "not out of sight, out of mind."

Elliott points out that managers who adhere to the idea that feedback comes solely from office interactions may lack creativity. The idea of "catching up" around a water cooler, he said, may be a bit outdated.

One alternative managers should try and set up remotely, Wigert said, could be "walking meetings."

"Walking meetings are a great way to catch up with your remote employee in a very unstructured and healthy way," Wigert said. "Find a time that works for both of you to take a phone call from your favorite trail or treadmill." Other options include virtual lunches or coffees, which create an "inviting environment to casually catch up on work and life, and give some light feedback or coaching," he said.

These kinds of moments, workplace experts say, can help managers evaluate their employees without having to observe their work processes. Workers who are more frequently remote may find themselves in a situation in which they are being judged "only on their deliverables," Kropp said.

Being Intentional About In-Person Meetings

That said, "we recommend trying to give performance reviews in person, as well as other sensitive feedback, when possible," Wigert said. At the same time, in-person conversations should not be reserved solely for performance reviews.

Elliott, however, cautioned against using the in-person-only model for performance reviews to cover up poor management skills. "If you are unable to have a conversation with someone about their performance regardless of where they are located," he said, "that is a failure of management."

Remote-Work Conduct Policy

As our workforce continues to operate with some or all employees working at locations other than [Company name] offices, the following expectations for employees are being clarified to avoid issues that may cause disruption to the workday and/or during virtual meetings.

General Expectations

- Remote employees are expected to be available and communicative during scheduled work hours.
- [Company name] work rules and other policies continue to apply to offsite work locations.
- Consumption of alcohol during work hours is never acceptable.
- Employees should seek a quiet and distraction-free working space, to the extent possible.
- Employees are expected to maintain their workspace in a safe manner, free from safety hazards.

Virtual Meetings

- While distractions are often unavoidable, try to keep them to a minimum. No music or television in the background during meetings.
- Keep yourself muted during video or audio conferencing unless you are speaking.
- Turning on video is encouraged but not required.
- Avoid eating a meal during a virtual meeting unless invited to do so by the meeting host.
- Smoking or vaping is not permitted during a video conference.
- Casual dress is acceptable; however, use discretion. No sleeveless tops, pajamas or other apparel that would not be appropriate to wear outside of your home.
- Avoid multi-tasking. Give your full attention to the meeting as if you were face to face.

We appreciate the effort that all of our employees have shown in the transition to remote work, and we hope these guidelines help to clarify [Company name]'s expectations when teleworking.

While gentle reminders may be all that is necessary in some circumstances, egregious or continued violations of these expectations and/or other [Company name] policies will result in disciplinary action.