

New Performance Management System



*Consistently and sustainably
providing quality and efficient
services to all clients, tenants and
stakeholders*



*After a successful
growth step, our
organisation is
maturing nicely.*

- ✓ We're bigger & better
- ✓ Financially strong
- ✓ Quality business plan
- ✓ MOS to drive service & efficiency
- ✓ A passionate team



*It's time we focus more
on our people and
how we can help them
grow as professionals at
Bridge Housing.*

What you told us about our current PMS...

What's Good?

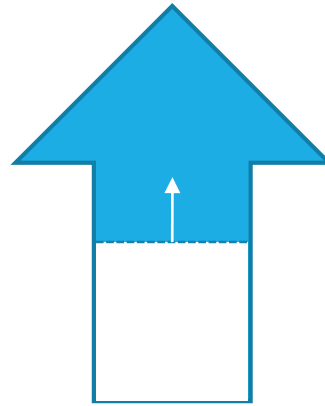
- ✓ A structured 121 process
- ✓ Understand my KPIs
- ✓ Manager support
- ✓ Chance to discuss issues
- ✓ Keeps me accountable
- ✓ Manager & Employee input
- ✓ Focused on my goals

What Could Be Better?

- ✗ Clear link between MOS KPIs, 121 and annual review
- ✗ A system that is easier to use
- ✗ Shorter process
- ✗ Easier KPI tracking
- ✗ More consistent 121's
- ✗ More flexibility when goals/objectives change
- ✗ Monthly ratings instead of annual
- ✗ Focus more on what I want to achieve in my job and as a professional

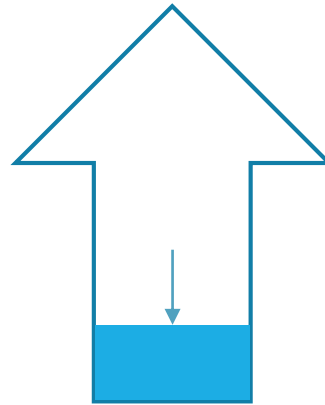
What the research
told us...

There a number of
common complaints
about performance
management.



Effort is too high.

- Demands too much of employees and managers
- Process is too complex and takes too long to complete
- Technology is cumbersome



Usefulness is too low.

- Doesn't deliver enough value
- Not relevant to the way we work
- Not aligned with business needs
- Disengaging and unmotivating

But not all complaints prove to be equal!



Reducing Effort Doesn't Pay Off!

PROOF POINTS

Where changes focused on:

- Reduced documentation
- Remove performance ratings
- Fewer formal performance management steps



Result:

- ✗ Measurably decreased workforce performance
- ✗ Lowered employee perceptions that performance management is valuable and worthwhile.



Increasing Usefulness Does!!!

PROOF POINTS

Where changes focused on:

- Delivering more of what employees need to perform
- Helping organisations achieve their business goals



Result:

- ✓ Increased employee engagement
- ✓ Lifted workforce performance
- ✓ Increased % of employees who think performance management is fair & accurate.

Aim of our new PMS



*To enable **high quality performance discussions** that motivate and empower our individual staff members to perform, grow and develop.*

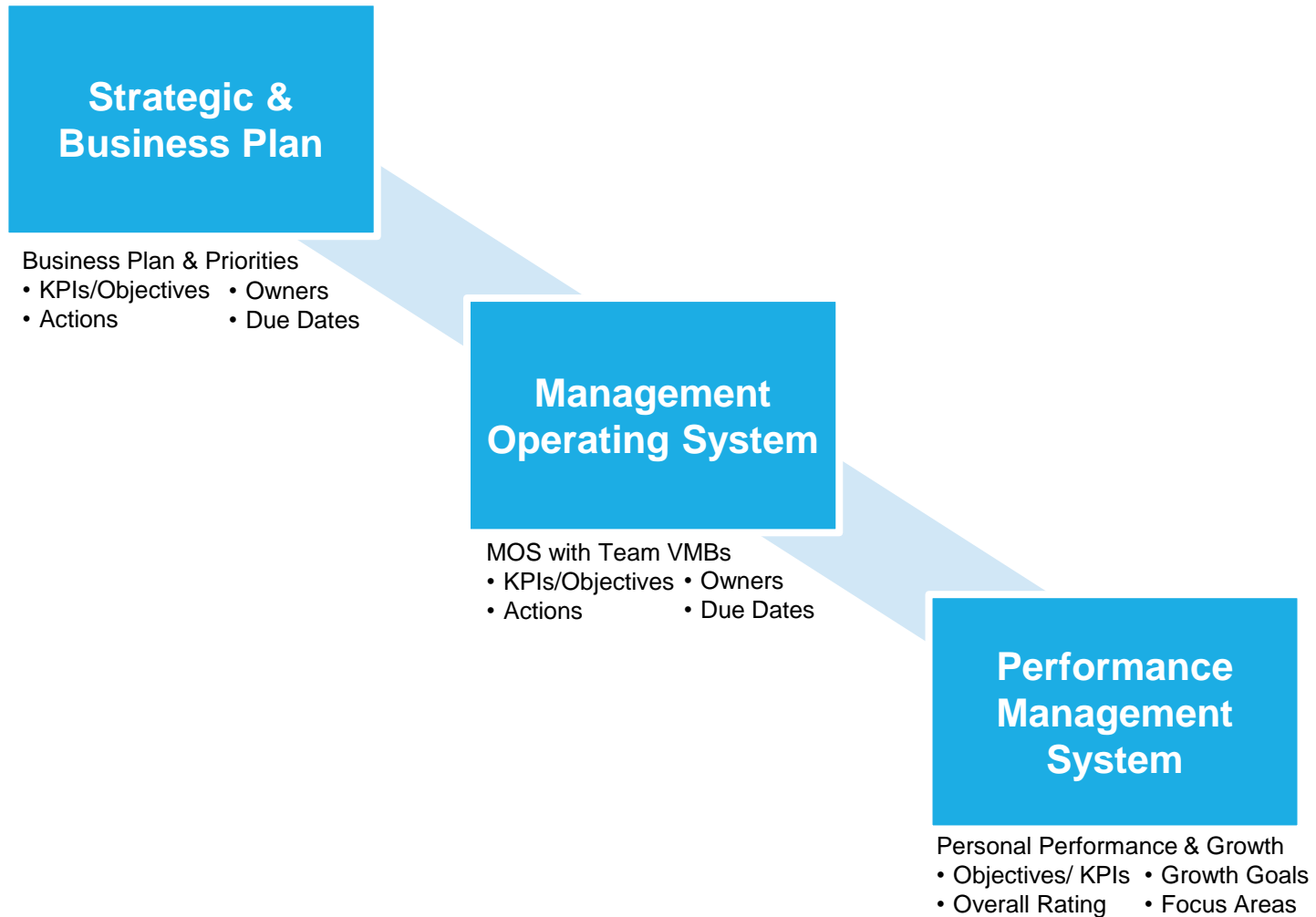
More than a system...

KEY FEATURES OF OUR NEW PMS



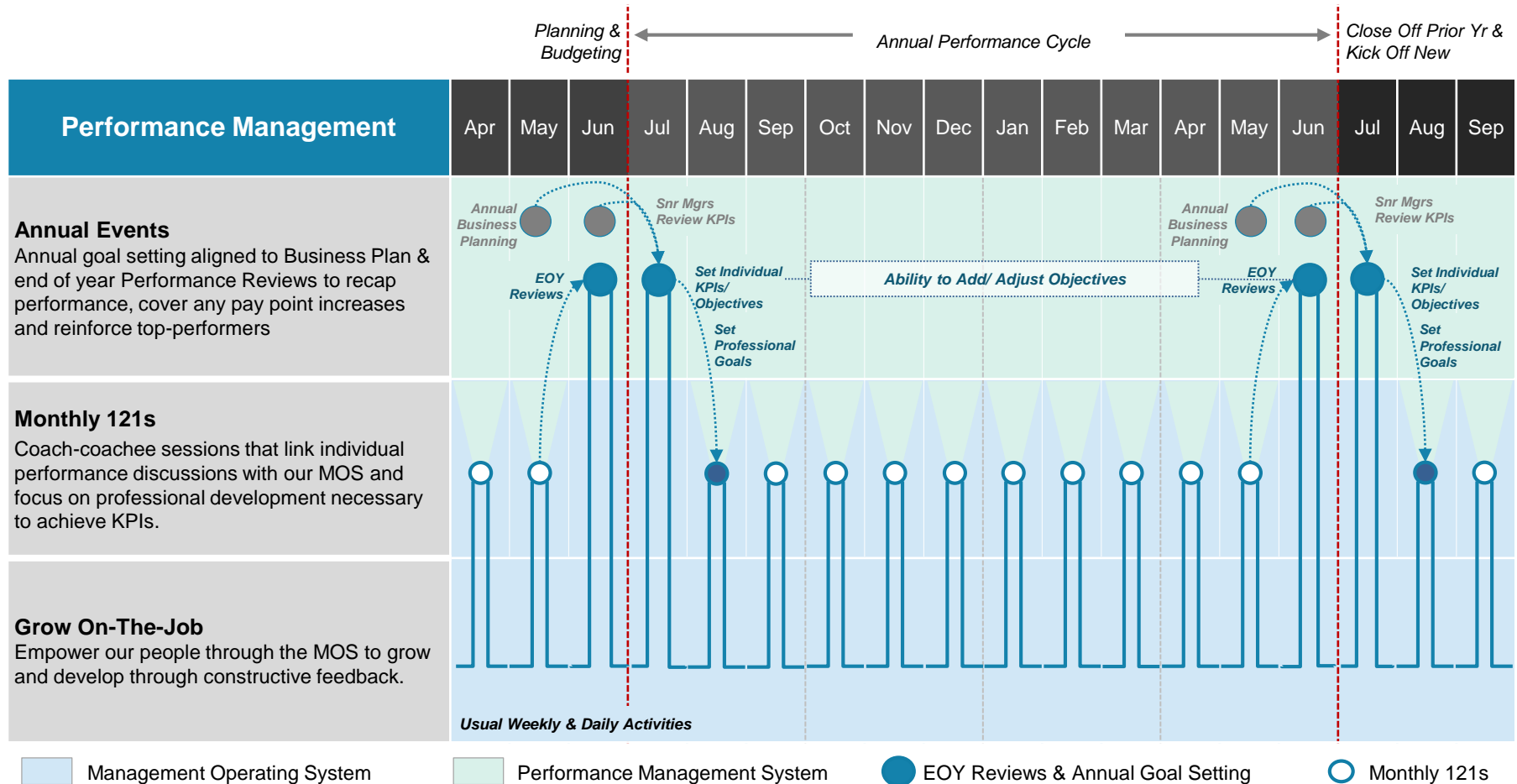
- ✓ **Embraces a forward-looking ‘performance philosophy’** which connects our KPI’s with employees’ performance and growth objectives.
- ✓ **Continue to set goals** aligned to our Business Plan and MOS KPIs.
- ✓ **Use monthly 121s for quality performance discussions** where managers coach our people with a view to helping them **grow professionally through personal accountability**.
- ✓ Work together to build a culture that **welcomes constructive feedback** in Bridge Housing.
- ✓ **Use End-of-Year Reviews to recap and agree performance conclusions** for the year based on the 121 discussions captured during the year.
- ✓ Introducing more **consistent ways of rewarding employees with non-financial rewards** that **specifically reinforces our top-performers**.
- ✓ **Adopt a new system through My Place** that is quicker & easier to use and tracks over time.
- ✓ **Hold each other accountable for using the PMS** as a way to empower our people to grow and develop.

How it fits into our organisation



Our New Performance Management Cycle

SEE HANDOUT



Key components of our new PMS

- ✓ New 121 and Annual Review in My Place (September 2020)
- ✓ New online forms to be used in interim
- ✓ 121 Coaching training for Managers to support staff development
- ✓ Training for all staff on taking and using feedback to enhance performance
- ✓ A strategic KPI for all people managers – PMS adoption

New 121 Form

121 Performance Discussion

Monthly Performance Check In & Coaching

Objectives/Deliverables/KPIs

To prepare for a 121, begin by referring to your Visual Management Board from the MOS and any specific projects or initiatives that you own. Identify standout areas where you are excelling, and areas where you can make the greatest improvements. Enter these as separate areas to discuss below and show a current assessment. Now, please consider *why the KPIs or gaps are not being met* and then enter notes about *what needs to improve to get to green* (e.g. consider Process, Organisation, Workload, Process, Capability), and key *actions you can take or need support with*.

Key wins for the month

KPI/Deliverables	Due	On Track	Agreed Focus Areas/Actions
Adherence to Management Operating System Are your KPIs and your objectives on track?		<div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>	
Adherence to customer service standards - Are you consistently meeting all standards?		<div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>	
Adherence to leadership standards e.g. monthly 121's		<div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>	
Adherence to Community Engagement standards e.g. Attend at least 1 tenant or community event annually.		<div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>	

What support is needed from your manager or Bridge Housing?

New 121 Form

My Professional Growth

Discuss the rating scale with your manager and agree your rating for the month

Below <input type="checkbox"/>	Basic <input type="checkbox"/>	Sound <input type="checkbox"/>	High <input type="checkbox"/>	Outstanding <input type="checkbox"/>
Capability is very limited and well below role expectations	Capability is limited and is working towards meeting role expectations	Is sufficiently capable and consistently meeting their role expectations	Highly capable in most situations and sometimes performs above role expectations	Extremely capable in all situations and consistently performs above role expectations

What do you need to do more of? What are your strengths that you can use to achieve your goals?

+ What do you need to do less of? What strengths should you dial down?

My Professional Goals

In 3-5 Years	
In 1-2 Years	

Priority Actions

Identify up to three priority actions to assist you to meet my current role goals or achieve professional goals

Action 1	
Action 2	
Action 3	

Key components of our new PMS

The following mock-up illustrates the key components we propose to design into our new performance management system to support end of year performance recaps and reviews.

Performance Achievements	
My Performance Summary Before completing this section, please look over your 121s for the year and consider key highlights/ lowlights and themes about your year's performance as measured by your KPIs and deliverables.	
Have I met my KPI's/ Deliverables for this Year?	
<i>My Summary Comments</i>	<i>Manager Summary Comments</i>
What are the objectives I would like to achieve for Bridge Housing next year?	

My Professional Growth				
What Was My Average Rating Across the Year				
Below Capability is very limited and well below role expectations	Basic Capability is limited and is working towards meeting role expectations	Sound Is sufficiently capable and meeting their role expectations ✓	High Highly capable in most situations, sometimes exceeds role expectations	Outstanding Extremely capable in all situations & consistently performs above role expectations
Comments about my capability growth over the year?				
My professional goals				
In 3-5yrs				
In the coming 1-2yrs				
Summary comments on how BH has assisted my professional development				

Our New Top-Performer Policy

To motivate & reward
Bridge Housing's Top-
Performers we are proud
to announce a new Top
Performer Policy



Policy

Top Performer Policy

Purpose

Bridge Housing values its people and the contributions they make to our organisation's delivery of quality services to our residents, applicants and other stakeholders. As an organisation we want to motivate, engage, support and retain staff who are top performers. Top Performers are employees who seek to grow and develop professionally, who consistently exceed the expectations of their role and demonstrate exceptional adherence to Bridge Housing's values.

Scope

All permanent and fixed term employees have the opportunity to develop and grow into a Top Performer at Bridge Housing through their performance and behaviour as part of the Bridge Housing team.

What is a top performer?

Quality of Work

Top Performers complete tasks at a high level of competency. They consistently exceed KPI's and deliver above expectations in their role.

Behaviour and Values

Top Performers conduct their work in a professional manner. They take accountability for their work, they help others, have a positive mindset, resolve problems by talking to their colleagues directly or to management, and they frame their behaviour around Bridge Housing values and policies.

Desire to Improve

A Top Performer wants to stretch themselves and welcomes the opportunity to learn and improve. They are open to feedback and don't close themselves off from or refuse to take onboard constructive feedback.

Consistency

Top Performers perform at a high level at almost all times. Missing an occasional day of work or lacking motivation every now and then happens to everyone, but consistency is key.

We recognise that people value different rewards

Top performers will have access to the following rewards:

- Provide professional exposure to the next management level, higher duties or to special projects.
- Allow the employee to represent the organisation at a reputable external event such as conference or seminar.
- Allow the employee to attend a mutually agreed special training course.
- Fully paid Bridge Housing Scholarship to complete role relevant qualification (subject to application and budget)

Document Number: --

Version: 1

Next Review: DRAFT



QUESTIONS?