



Managing Performance

Note: *In response to the substantial turnover of middle managers in Cooperative Extension, the following training module for new middle managers has been prepared by a joint task force of the Program and Staff Development and the Middle Management Committees of the Southern Region Program Leadership Network. The target audience for this module is broadly defined as middle managers. The terminology varies by institution, but middle management is meant to include such positions as district directors, regional directors, and county directors. (They may also be referred to as chairs or coordinators). Because of the uniqueness of each position and the policies and procedures of each state and institution, these modules should serve as a general framework and will need to be supplemented with more specific support materials. If you wish to contact the authors of this module, their contact information can be found at the end of the module.*

Objectives:

- Sets clear performance targets
- Provides specific feedback and coaching on a regular basis
- Addresses performance problems in a fair and consistent manner
- Understands the steps in coaching performance using appraisals
- Provides performance reviews that are constructive and result in employee improved performance

Advance Preparation:

- Obtain supplies
- Print handouts and copies of slide shows.

Materials Needed:

- Computer / projector / screen
- Flipchart / markers
- Large neon sticky notes (8x5)
- Posterboard (1 per six participants)

- Handouts:
 - “Performance Management”
 - Copies of internal performance review forms and procedures (state specific); other documents may include professional development plan, job description, goals set in previous conference, etc.
 - “Performance Review Discussion – Guidelines for the Supervisor”
 - “Constructive Performance Feedback”
 - “Coaching Practices Checklist”
 - “How to Coach Problem Employees – A Four-Step Plan for Managers”
 - “Progressive Discipline” (or print copies of specific University policy)
 - “General Rules for Documentation”
 - “Tips – Discipline and Performance Problems”
 - “Performance Management Scenarios”
- Slide Shows:
 - *Performance Management Process*
 - *Coaching for Superior Employee Performance*
 - *Progressive Discipline – Guidelines for Use*

Time Needed: 3 – 4 hours

BACKGROUND

County/District Directors or Unit Coordinators are responsible for performance management of employees in the county/ district. In order to be effective in their role they need to understand the legal process of performance management as specified in the University and state.

They also need to understand some basics of being an effective manager by learning strategies for effective performance management including conducting performance review discussions and coaching basics. This lesson will provide guidelines to help meet these needs.

INTEREST APPROACH

Facilitator distributes large neon sticky notes to participants and asks each participant to write down one word that comes to mind when they hear “performance management”. Participants bring to front of room and post on flipchart pad. Facilitator reads aloud words posted and discusses any similarities / differences.

LESSON

- Review handout – “Performance Management” and discuss purposes of performance management.
- Show powerpoint – “Performance Management Process”.
- Distribute copies of state specific performance review forms and procedures. Review process, timeline, institution policies and any other relevant documents.
- Have participants get into small groups (3 – 5) and share some experiences – positive and negative - they have observed during a performance review discussion. Have groups report to the whole group.
- Refer to handouts “Performance Review Discussion – Guidelines for the Supervisor” and “Constructive Performance Feedback” as references for further information.
- Ask participants to define “Coach”.
- Have participants complete the “Coaching Practices Checklist”.
- Show powerpoint – “Coaching for Superior Employee Performance”.
- Review handout “How to ‘Coach’ Problem Employees: A Four-Step Plan for Managers”.
- Activity: *“Understanding Your Role in Performance Management”*
- Ask participants if they are familiar with the concept of ‘progressive discipline’, and if so, to describe.
- Show powerpoint – “Progressive Discipline”.
- Refer to handout “Progressive Discipline” as a sample policy statement (or review specific University policy).

- Review handout “General Rules for Documentation” and “Tips – Discipline and Performance Problems”.
- Activity: *“Performance Management Scenarios”*

APPLICATION

- Activity: *“Understanding Your Role in Performance Management”*
(45 minutes)
 - Divide group into clusters of 6. Each cluster is to divide into three pairs, with each pair assigned one of the three following activities:
 - Pair One. Using a poster board, "draw" what an ideal performance manager would look like, labeling the body parts...for example a heart representing a caring person, or big ears for all the listening they would be doing.
 - Pair Two. Come up with a skit representing the **worst** performance review discussion session known to man and perform this before the group. Omit names/ specific identifying details.
 - Pair Three. Tell an interesting story, reflecting back on any performance management experience in their past (either positive or negative) and share this with the group. Omit names/ specific identifying details.
 - Give a few minutes for them to select assignment of activities and prepare presentation.
 - The facilitator should walk among the tables to answer any questions and assist as needed. They also need to hurry some of the talkative ones along or be ready to cut off some of the skits if they get too long.
- Activity: *“Performance Management Scenarios”*
(30 minutes)
 - Distribute handout “Performance Management Scenarios”.
 - Divide participants into four groups.

- Assign each group one of four scenarios to discuss.
- Have each sub-group report to group; discuss implications of each.

REFERENCES

Business & Legal Reports, Inc.

“Performance Management at UVA”, LEAD@UVA. University of Virginia Human Resources.

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