



# Assessing performance outcomes

## QUICK REFERENCE GUIDE FOR MANAGERS

A core responsibility of managers is to assess each employee's performance at regular intervals to ensure their contribution is aligned and optimal. This is essential in order to provide balanced, accurate feedback and to identify how to support the person in bringing out their best performance. The practice of assessing individual performance also acts as a control in governing an organisation, ensuring that minimum standards are maintained, key responsibilities are fulfilled and commitments are being met.

### KEY BENEFITS OF ASSESSING EMPLOYEE PERFORMANCE

- Provides a structured way to track tangible progress towards achievement of goals/objectives
- Ensures that individual efforts are aligned to key deliverables and are adding value in the right way
- Makes feedback more objective, holistic and relevant to the individual – this in turn tends to make it more acceptable and constructive
- Highlights key successes which should be recognised and acknowledged
- Enables accountability for each employee's personal contributions and behaviour in the way they discharge their role
- Identifies potential obstacles or issues which could be blocking effective performance.

## WHEN TO ASSESS PERFORMANCE

As a Manager, you need to be constantly observing and assessing the performance of employees in your team on a day-to-day, ongoing basis, by sampling the different elements of the person's overall responsibilities and job role. There are however some specific situations where you will need to do this more formally and document how things are progressing. These include:

- Formal performance management and development reviews at least twice a year, more as a summary of ongoing feedback and observations over a period of time. This is a minimum standard for all employees in the South Australian Public Sector.
- At the key milestones during extended projects/programs of work or formal project implementation reviews
- After important meetings, events or incidents that might relate to an employee's performance objectives, to identify any specific learning points or actions that need to be taken
- In line with formal recognition programs that are established in your agency.



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## WHAT IS NEEDED - INPUTS IN ASSESSING PERFORMANCE

- Role description – this outlines the overall scope of performance for the role.
- Goals/ Objectives – these outline the specific performance outcomes and priorities documented in a performance agreement/plan.
- Standards – these include the Code of Ethics for the South Australian Public Sector, the SA Public Sector Values, and any other competencies or standards that have been defined for the person's role and your agency.
- Relevant data – objective data from specific measures identified for each goal/ objective that has been agreed, ideally in a quantitative form e.g. number of cases handled, projects delivered on time, cost savings achieved.
- First hand observations – your direct observations from sampling a cross-section of activities that make up the person's role over time.
- Feedback from relevant parties - e.g. from other managers, customers/ stakeholders, team members, colleagues in different departments. Using multiple sources of feedback will make your assessment more robust and representative.

## HOW TO ASSESS PERFORMANCE

There are a number of different elements which make up someone's performance at work, so it is important to take a holistic view and bring in as much objective information as possible to support your assessment. Some useful questions to ask include:

- How has the person fulfilled the full scope of their accountabilities as outlined in their role description?
- What outcomes have they delivered in relation to their individual goals/ objectives? Were these on time, on budget, to the right quality?
- What does the objective evidence from the specified performance measures indicate? How does this compare to baseline measures or other relevant benchmarks?
- What has the person demonstrated in terms of their behaviour in the way they have played their part? How does this fit with the Code of Ethics for the South Australian Public Sector, the SA Public Sector Values and other competencies or standards that your agency uses?
- Have there been any situational factors which have impacted performance in some way?
- Are there other activities or contributions the person has made to the organisation outside of their job role, goals or objectives which should be recognised?
- What impact has the person had on customers, their team members, the broader department, other stakeholders?



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**When you have reviewed these different aspects of the person's performance, you will then need to ask yourself, "Overall how does this fit with the expectations that were set and agreed for the given period?" Make sure you are comfortable that you have taken a rounded view and "own" your judgement of the person's performance, using specific supporting information and rationale to support your conclusion.**

#### KEY POINTS

- Assessing performance in a structured, systematic manner is the foundation to providing relevant feedback that supports effective performance management and development.
- It is a core responsibility for all managers in the SA Public Sector.
- You need to have both objective criteria and relevant data in order to conduct a structured assessment of someone's performance.
- Gathering input from multiple sources helps you to develop a more robust assessment.
- Remember that you are assessing an employee's performance over a given time, not them as a person.