


Welcome!

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- 10 years HR Professional
- Main Stay Board member since 2018



Intros:
A little bit about your organization, your role

1

Performance Management



2

What we will cover

1. What is Performance Management
2. Why is it important
3. How to get started
4. Inputs
 - Mission & Strategic Plan
 - Goals
 - Development
5. Feedback/Recognition – Connection
6. Regular Check-ins

3

What comes to mind when you think of Performance Management?



4

- What makes your organization successful?
- What current process do you use for evaluating your staff's performance?
- What opportunities do you have?



5

What Is Performance Management?

A set of processes and systems aimed at developing employees, so they perform their job to the best of their ability, ultimately helping accomplish the strategic goals of the organization.



6

Non-Profit Performance Management

Defined by community impact and exists to provide a service – mission driven (Not turning a profit)

Answer to board members, donors and other key stakeholders (Not Shareholders)

Performance metrics, objectives and goals are measured differently – metrics are more qualitative than quantitative

- Effective performance management = greater community impact

<https://workdove.com/performance-management-in-nonprofits/>

7

Why is it important?

	EMPLOYEES	MANAGERS
GOALS 	Help me stay focused and aligned	Insight into progress and challenges
COACHING 	What's going well and where can I have a greater impact	Offer real-time feedback for positive outcomes
DEVELOPMENT 	Talk about my career growth	Helping employees reach their full potential
RECOGNITION 	My success is celebrated and I feel valued	Celebrate success to inspire and motivate

Strengthens working relationships because it is a two-way conversation, and a process that the employee takes ownership in.

8

Inputs



Lead with your mission – Your mission needs to be at the forefront of all internal initiatives and decisions. Each person's contribution has an impact on the mission and should be reflected in performance management objectives.

9

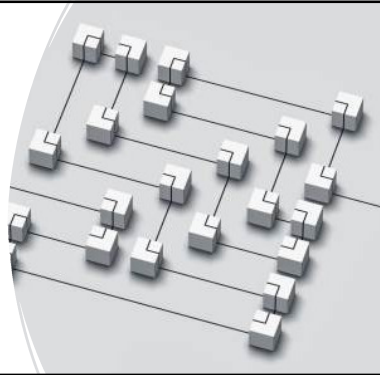
Inputs cont.

- Strategic Plan**
- Workplace behaviors**
- Roles and responsibilities**
- Goal Setting**
- Providing feedback and measuring progress**

10

Strategic Plan

Strategic planning for a nonprofit organization is a process of creating a roadmap to guide the organization towards achieving its mission by defining clear goals, identifying key priorities, and outlining actionable steps to reach them



11

Key elements of a nonprofit strategic plan

- **Mission and Vision Statements:** A clear articulation of the organization's purpose and long-term aspirations.
- **SWOT Analysis:** An assessment of the organization's internal strengths and weaknesses, as well as external opportunities and threats.
- **Core Values:** Guiding principles that inform decision-making and organizational culture.
- **Strategic Goals:** Broad, overarching objectives that align with the mission and vision.
- **Specific Objectives:** Measurable, actionable steps that contribute to achieving strategic goals.
- **Action Plans:** Detailed outlines of activities, timelines, responsible parties, and necessary resources for each objective.
- **Performance Metrics:** Key indicators to track progress towards goals and assess the effectiveness of strategies.

12

Workplace behaviors

- Observable actions that support the organization's core values and drive the culture.
- Defined expectations for how to act at work and are the standard by which employee actions are assessed.
- Should align to the mission and further the vision.

13

Workplace Behaviors - Culture

- Collaboration
- Adaptability
- Accountability
- Communication
- Reliability
- Motivation
- Empathy

14



Roles define a person's position, while responsibilities are the specific tasks and duties tied to that role.

Functional roles and responsibilities boost productivity, team success, morale, and momentum by providing clear expectations and structure.

To develop roles and responsibilities, identify tasks, assess team strengths, align duties with job descriptions, and gather feedback.

Roles & Responsibilities

15

Goals

The infographic illustrates the impact of goal alignment on strategy execution. At the center is a yellow hexagon labeled 'STRATEGY EXECUTION'. Five surrounding hexagons represent the resulting benefits: 'Improves Employee Engagement' (top), 'Lower Costs' (right), 'Increases Productivity' (bottom right), 'Increases Motivation' (bottom left), and 'Provides Focus' (left).

16

GOAL SETTING

- **Define SPECIFIC goals:** Clearly articulate what needs to be accomplished, avoiding vague language.
- **Make goals MEASURABLE:** Establish clear metrics to track progress and success.
- **Set ACHIEVABLE goals:** Ensure your goals are realistic and attainable within the given timeframe.
- **Align RELEVANT goals with vision:** Connect individual goals to the larger organizational objectives.
- **Set TIMELINES:** Establish deadlines for completion

17

Development

The illustration shows several stylized human figures in business attire climbing a series of five red vertical bars of increasing height, symbolizing growth and development. A lightbulb and a thumbs-up icon are also present in the background.

18


Importance of Continued Development

- Continuing development to master current role**
 - Workshops
 - Certification courses
 - Seminars/Webinars
 - Podcasts
- Cross training in other roles**
 - Learn more about organization
 - Provides back up coverage when needed
 - Succession planning
 - More they know the more they add value, greater motivation and passion
- Retention**
 - When employees have opportunity to continue to grow and provide value, they are more apt to stay

19

Feedback

- What is the feedback/review process like at your organization today?



20

Preparing for your meeting

- What are you going to talk about?
- Active listening
- How can you help
- Next steps
- How often will you meet?

21

A good performance management discussion can include:



22

- Employee Information:**
 - Employee Name
 - Job Title
 - Department
 - Review Period (start)
 - Manager Name
 - Performance Goals and Objectives:**
 - List of key performance indicators (KPIs) directly linked to job responsibilities
 - Rating scales for each KPI (e.g., Exceeded Expectations, Met Expectations, Needs Improvement, Below Expectations)
 - Comments and goals complete to support ratings
 - Strengths and Achievements:**
 - Highlight key areas where the employee has excelled
 - Provide concrete examples of accomplishments that demonstrate their strengths
 - Areas for Improvement:**
 - Identify areas where the employee can develop further
 - Provide specific feedback with actionable steps for improvement
 - Development Goals:**
 - Set clear, measurable goals for the next review period
 - Discuss potential training or development opportunities to support goal achievement
 - Feedback and Discussion:**
 - Space for employee self-reflection and feedback on their performance
 - Area for manager to provide additional comments and suggestions for improvement
 - Action Plan:**
 - Outline specific actions the employee will take to address areas for improvement and achieve development goals
- Example questions that could be included in a performance management discussion form:
- Which areas of your work do you feel could be improved?
 - What support do you need from your manager to achieve your development goals?
 - What training or development opportunities would be beneficial for you?
 - How do you feel about your overall performance in this role?
- Important points to remember when using a performance management discussion form:
- Be specific and concise:** Use clear examples to support your feedback.
 - Focus on development:** Use the discussion to identify areas for growth and create actionable plans.
 - Open communication:** Encourage open dialogue between the employee and manager.
 - Regular feedback:** Conduct performance reviews regularly throughout the year, not just annually.
- Employee Signature _____ Date _____
 Supervisor Signature _____ Date _____

Sample layout

23

Performance Appraisal - Quarterly Evaluation Form

Appraisal Period	From: _____ To: _____
Appraiser	Name: _____ Title: _____
Appraisee	Name: _____ Title: _____
Appraisal Date	_____

Overall Rating: _____

Comments:

Strengths:

Areas for Improvement:

Development Goals:


Overall Summary:

Signature: _____ Date: _____

24

Acknowledge, Celebrate, Share

- Way to recognize each other – peers
- Social media posts – recognizing efforts of staff/volunteers etc...pictures of them in action
- Quarterly pizza day to recognize the team for their efforts
- Shout outs during team meetings
- Something from your organization's store – shirt, sweatshirt, mug



28

Employee Relations

How does having an effective performance management process support the organization and the employee when it comes to an employee relations issue?

29

Constructive Conversation

- Advice or guidance on how someone can improve
- Can help clarify expectations
- Can help employees learn and grow
- Focuses on behavior that wasn't successful and shouldn't be repeated
- Centers on specific behaviors, actions, or outcomes

30

Constructive Feedback Example

- Patrick has come in late several days this week, which led him to miss important details during a meeting and affected the team's workflow.

State the issue as you have observed:
Patrick, I noticed you have come into work later than usual and missed the beginning of yesterday's meeting. I am worried you did not hear important information concerning our project that may affect your tasks this week.

Explain how his actions affect his work:
When you arrive late to work you not only miss meetings and important information that is being shared, but you are not available to the team when expected.

Put the ownership on them:
Help me to understand why you are struggling to get to work on time and how you plan on resolving this.

Awareness of failure to improve behavior:
If you are unable to resolve these issues and arrive to work on time further disciplinary action may need to be taken(policy) I don't want to see it get to that point, so how can I work with you to resolve?

31

Constructive Feedback Example

Employee demonstrates a negative attitude

- Bobby has been making complaints around the office and sometimes displays a disrespectful attitude toward his colleagues and supervisors, such as rolling his eyes or ignoring them.

State the issue(s) you have observed:
Bobby, I wanted to check in with you about some behaviors I have seen over the last few weeks. Help me to understand what is causing this behavior.

How are actions affecting work:
Based on the answer –you may come back with While I understand you are having issues with some of your co-workers, the behaviors you are displaying are not acceptable and are causing disruption to others and creating a negative environment.

Ownership:
This behavior is unacceptable and cannot continue, so how can I support you in a plan for improving these behaviors?

Awareness of failure to improve:
If you are unable to resolve these issues and arrive to work on time further action will be need to be taken(policy) I don't want to see it get to that point, so how can I work with you to resolve?

32

Importance of Documenting Employee Issues

Provides Expectations
Describe behaviors that you want to continue or change
Employees explanation
Detailed Action Plan
Deadlines
Consequences

33

Summary

- Performance Management is important for the health of your organization and your people
- Mission must be at the forefront
- Aligning Mission, Strategic Plan with Goals, Development and Feedback are critical
- Continuous check ins
- Performance Evaluation
- Recognition -

34



35

References & Links

- <https://www.aihr.com>
- [Workhuman.com](#)
- [Performance Management in Nonprofits: A Guide to Best Practices – WorkDove](#)
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- <https://www.betterworks.com/magazine/poor-career-growth-and-biased-performance-reviews-terril-employees/>
- [Employee rewards and recognition program a quick guide](#)
- [How To Define Team Roles and Responsibilities in 4 Steps | Indeed.com](#)
- [Performance Review Examples and Best Practices for Companies – Betterworks](#)
- [successful nonprofits - Google Search](#)
- [Values-Based Performance Review Template | Guide and Tips](#)
- [How to Evaluate Nonprofit Performance and Set SMART Goals | FrontStream](#)
- [7 Key Characteristics of Successful Nonprofit Organizations](#)
- <https://www.indeed.com/career-advice/career-development/delegating-tasks>
- <https://www.shrm.org/topics-tools/news/employee-relations/how-to-create-bulletproof-documentation>

36

Employee Name: _____
 Date of Assessment: _____

Category	Comments
Quality of work <small>Meets or exceeds expectations in quality and quantity of work.</small>	Exceeds Expectations Meets Expectations Needs Improvement Unsatisfactory
Reliability/Responsibility <small>Consistently completes assigned work on time and in a professional manner.</small>	Exceeds Expectations Meets Expectations Needs Improvement Unsatisfactory
Communication Skills <small>Communicates effectively with customers, colleagues, and supervisors. Listens and responds appropriately.</small>	Exceeds Expectations Meets Expectations Needs Improvement Unsatisfactory
Judgment & Decision Making <small>Exercises sound judgment and makes decisions that are in the best interest of the company and customer.</small>	Exceeds Expectations Meets Expectations Needs Improvement Unsatisfactory
Initiative & Flexibility <small>Shows initiative and flexibility in handling unexpected situations and changes.</small>	Exceeds Expectations Meets Expectations Needs Improvement Unsatisfactory
Knowledge of Position <small>Has a thorough understanding of the position and its requirements.</small>	Exceeds Expectations Meets Expectations

Monthly Performance Review

Month	Quality of work	Reliability/Responsibility	Communication Skills	Judgment & Decision Making	Initiative & Flexibility	Knowledge of Position
Jan						
Feb						
Mar						
Apr						
May						
Jun						
Jul						
Aug						
Sep						
Oct						
Nov						
Dec						

Documentation Examples

- [Discipline – written warning](#)
- [Termination for Cause](#)
- [Year End Performance](#)
- [Performance Appraisal](#)
- [Performance Improvement Plan \(PIP\)](#)
