

Section 03:

Holding Effective Performance Meetings and One-to-Ones



Talking about Performance

Discussing performance and providing feedback is not easy but it is important to the continued success of your team and the individuals within it.

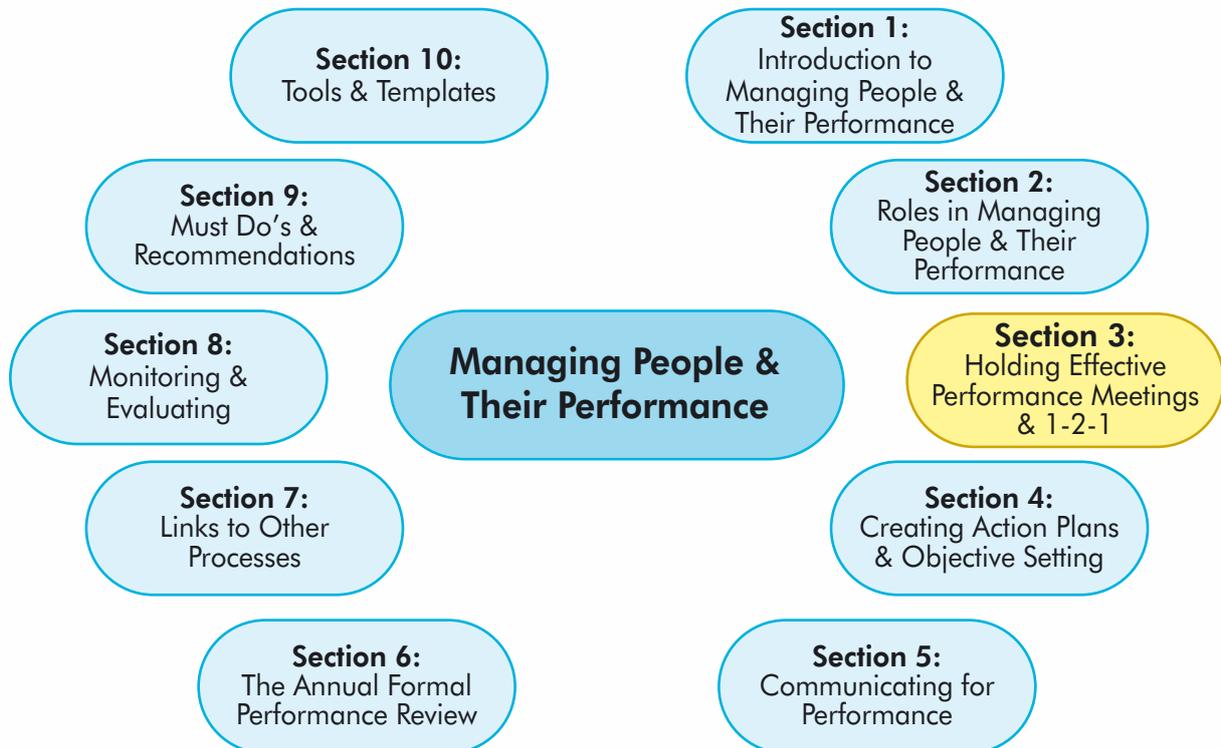
Meetings provide you with an opportunity to share information, encourage communication, make decisions, raise issues and give praise - all through face-to-face interaction. Because of this communication opportunity, meetings are invaluable – however, they are only valuable if they are well planned and managed.

This part of the guide will support you in holding effective meetings and one-to-ones to discuss performance and includes:

- The reasons for holding a meeting
- Holding Effective Meetings
- The Different Types of Meeting
- The Annual Performance Review Meeting

TIP...

In your Line Manager role there will be certain functions that are mandatory and other functions that, although not mandatory, are considered good practice. Each section of the toolkit will summarise these areas on the final page. Please note – the must do’s at the end of this section are those from section 3 only. A summary of all ‘Must Do’s’ and ‘Recommendations’ from all Sections can be found in Section 9.



Why hold a meeting?

There are many different reasons why you may want to hold a meeting:

- Information sharing
- Team building
- Decision making
- Generating ideas
- Planning
- Workshops
- Managing and communicating change
- Consultation
- Obtaining or delivering feedback
- Undertaking work
- Problem solving
- Teamwork and motivation
- Discussing & reviewing performance and progress against targets
- Sharing and celebrating success
- Setting and agreeing objectives
- Training or sharing knowledge
- Assigning or delegating tasks
- Emergency / crisis management

For the purpose of Managing People and Their Performance this guide will focus on meetings to discuss and review performance, however, much of the guidance will help you plan, facilitate and evaluate meetings held for other purposes.

Effective Meetings

The benefits of well managed meetings can include:

- Effective two way communication
- Exchange of information
- Establishes expectations
- Tangible actions
- Definition of roles and responsibilities
- SMART objectives and stretching targets
- Increased motivation and engagement
- Identification of development needs
- Enhanced performance
- New ideas and more effective ways of working
- Builds trust and respect
- Problems get solved
- Reduces conflict by raising issues as and when they arise

What can you do to make meetings effective?

The Five Ps

Purpose: Why are you holding the meeting?

People: Who needs to be there?

Process: How will it meet the desired outcome?

Product: What will be the tangible outcome(s)?

Place: Where and when will the meeting be held?

Purpose

Prepare in advance. What is it you want to achieve through holding the meeting? Try to gauge the potential input and reactions of those attending and how you will manage this.

People

Keep numbers to a minimum – only invite those who really need to be there.

Process – The Agenda

How will your meeting achieve the desired outcomes? Plan how the meeting will run and produce an agenda with timings. Circulate this at least 2 days prior to the meeting so those attending know what is to be discussed, can prepare any pre-work they have to do and compile questions or comments. Always allow time for feedback and questions at the end of the meeting and be prepared for the questions / feedback.

Product

It is very easy for meetings to become general discussions rather than remain focused on the purpose of the meeting and the desired outcomes so it is essential to keep focused. Manage the meeting – keep your contributions concise, to the point and directed to your audience. Ensure decisions are summarised and reiterate action points. Produce and circulate minutes within 2 days of the meeting and keep these to a minimum - note important discussion points, decisions, actions agreed, persons accountable and dates for completion.

Place

Meetings should be held, whenever possible, in a private, comfortable environment away from any distractions. Schedules should be maintained with the appropriate amount of time dedicated to the discussion – it is always better to plan in a little extra time just in case.

TIP...

You should also be mindful of the timings of meetings, holding a meeting at the end of the week before everyone leaves work will not be received well, especially if some of the messages being delivered are of a sensitive nature.

(Templates for an Agenda and Minutes can be found in Section 10 of the guide.)

Different Types of Meeting

When you are looking to effectively manage performance there are 3 types of meeting you can use:

- Individual (the 1-2-1)
- Team
- The Annual Formal Performance Review

Effective people management and performance management requires regular meetings with the individuals within your team and with your team as a whole. These meetings can be informal or formal in nature depending on the circumstances and will provide you with the opportunity to discuss, openly and honestly, performance against objectives and targets.

The 1-2-1

Regular scheduled 1-2-1 meetings involving you and the people within your team should be part of working life and can build trust and stop performance reviews being seen as intimidating, stand alone events with little bearing on the rest of the working year. They allow you to get to know the person in the role, and just as importantly they allow that person to get to know you and understand their role, and the impact of performing within that role, more fully.

Who is involved?

You and the individual – this is a 2-way discussion around the performance of the individual, their progress against objectives, identification of any support required, development needs etc. It is recommended that any action points from the meeting, whether formal or informal, are noted and circulated following the meeting.

How long should the meeting last?

Depending on what is being discussed your 1-2-1s could range from a 15 minute 'catch up' to a more in-depth meeting that could take 60 to 90 minutes to fully achieve what is required. Schedules should be maintained with the appropriate amount of time dedicated to the discussion – it is always better to plan in a little extra time just in case.

How often is regular?

Best practice recommends fortnightly meetings around performance however this will depend on the individual, some may need weekly meetings, especially if they are new to the role, have taken on new responsibilities, or have had recent performance issues. Some may need less frequent 1-2-1s, but the important thing is to assess each person by their individual need. If you are unable to maintain fortnightly meetings the recommendation is to have at least one face-to-face meeting each month, but keep in touch by other means on a fortnightly basis (e.g. telephone call), this way if anything arises that needs discussion that discussion can then take place, or an urgent meeting can be set-up.

TIP...

It can be tempting to put-off your regular 1-2-1s, especially if you know the conversation is going to be challenging, or if work pressures are mounting, but the management of the people within your team is paramount to the ongoing success of your team and the performance of the Council as a whole.

Where should the meeting take place?

Any meetings to discuss or review performance should be held in a private, comfortable environment, suitable for both you and the individual, away from colleagues and distractions.

Who arranges the meeting?

Again this will depend on the situation. You may already have a system of arranging regular meetings and if this is the case, and it works effectively, there is no need to change it. If however you haven't held regular 1-2-1 meetings you can start the process by booking in the initial meetings, or you could ask the individuals within your team to arrange the 1-2-1 meetings with you. Ongoing into the future it will give the individual more ownership of the process if the responsibility of arranging the meetings lies with them. Obviously it is your overall responsibility to ensure they are booking regular meetings with you.

What is going to be discussed?

Meetings can be either informal 'catch-ups' or more in-depth 1-2-1 performance discussions and can include:

- Discussions about performance and behaviour, including concerns about performance and praise for jobs well done
- Discussion and agreement on SMART targets and objectives
- Reviewing progress against existing objectives and assessing suitability of these and whether there is any requirement for change
- Updating action plans, including addressing development needs and evaluation of any development undertaken
- Open and honest discussion about concerns, aspirations, career management

- Communication of Council, Service Area, Team priorities, updates, areas of interest, legislation, health and safety if the individual has been unable to attend a team meeting where these are communicated
- General communication about wellbeing.

How are the discussions and outcomes of 1-2-1s recorded?

There are many ways of recording the outcomes of your 1-2-1 meetings and again this will depend on how in-depth the meeting is and what was discussed. Quick informal 'catch-ups' may not require any documentation, however it is good practice for both parties to make a few notes that can be referenced in the future, or even followed up by an email to confirm the outcomes. This is particularly useful when looking back over the year at the time of the annual performance review.

More in-depth 1-2-1 meetings will require the notes of key actions, issues, progress, development needs, etc to be recorded. This can be done in a variety of ways including updating the Notes from 1-2-1 Meeting Template and/or updating the individual's Action Plan (see Section 10 for a range of templates that can be used).

TIP...

It is imperative that you keep a record of more in-depth Managing People and Their Performance meetings, and of informal catch-ups that generate actions or areas of concern, as this can serve to assist you and the individual in monitoring and planning workloads whilst also providing a valuable reference point when preparing for the annual review. All documentation should be agreed and signed by both parties. Adopting this approach will also help you meet the criteria of the Investors in People Standard.

Team Meetings

As well as regular and ongoing meetings with the individuals within your team, *Managing People and Their Performance* also promotes regular team meetings to discuss performance, share information and build team rapport. Team meetings should be utilised to discuss any matters that concern the team along with the progress of the team as a whole.

Team meetings can bring a range of benefits, including:

- Setting the direction for the service
- Increased commitment and engagement
- Prevention of misunderstandings
- Assisting the communication, implementation and acceptance of change
- Improved upward communication
- Reinforcement of the role of the manager
- Increased awareness of employees, and managers, about performance, results, progress, policy, procedures, legislation, wellbeing, health and safety etc
- A decrease in rumours
- A consultative environment.

Who is involved?

You and your team – this is a group discussion around the performance of the team, their progress against targets, identification of any support required, development needs etc. This may be one of the main agenda items for your team meetings, or the basis for the meeting.

How long should the meeting last?

Depending on what is being discussed your team meetings can range from an hour, 3 hours or even necessitate a half or full day. Schedules should be maintained with the appropriate amount of time dedicated to the discussion – it is always better to plan in a little extra time just in case.

How often is regular?

This guide recommends monthly or 6 weekly team meetings however this will depend on your team and your working patterns. If you are unable to maintain monthly meetings you may wish to maintain contact through other means, such as email or a team bulletin, this way you are keeping your team up to date with developments and maintaining contact.

Where should the meeting take place?

Team meetings should be held in a private, comfortable environment, accessible and suitable for both you and each member of your team, away from distractions.

Who arranges the meeting?

You will have responsibility for arranging your regular team meetings. It is important to ensure that all team meetings have an agenda that is communicated in a timely manner to all members of the team.

What is going to be discussed?

The focus of the meeting could include:

- What are the team's objectives?
- Are they being achieved? If yes, how? If not, why?
- What barriers stand in the way? How can they be overcome?
- Where does the team go from here?
- What are the actions? With whom do they lie?
- What are the timescales? Targets?
- Is there any training and development needed?
- Are there any issues?
- What support is needed?
- What happens after the meeting?
- When is the next meeting?

How are the discussions and outcomes from team meetings recorded?

It is essential to minute the meeting and provide copies of these minutes to all team members, including those who were absent. Minutes should be distributed within 2 days of the meeting taking place. (See Section 10 for a team meeting minute template).

The Annual Formal Performance Review Meeting

At the end of the year you will sit down with the individuals within your team to discuss their performance over the past 12 months, looking specifically at objectives that have been set as the year has progressed, agreed development and evaluation of the development, individual strengths, weaknesses and general performance and behaviour. This meeting will be a summary of the regular Managing People and Their Performance meetings that you have held throughout the year, so nothing in this meeting should come as a surprise to you or the individual.

TIP...

The formal review is not 'in addition' to your management responsibilities as far as managing performance goes – it is part of your management responsibilities.

How the Annual Formal Performance Review is organised is detailed in Section 6 of the guide. The detail that follows looks specifically at the meeting that follows the review. Please note that many of the points could also be used when organising a regular 1-2-1 to look more in-depth at performance.

What to consider before the Annual Performance Review meeting

You as Line Manager and the individual have a responsibility to prepare for any meeting that aims to discuss or review performance. The points below should be considered when arranging any meeting with the aim of discussing performance.

The Individual

Individuals should consider the following prior to a Managing People and Their Performance meeting:

- What is my role / job description and what are the key components of my job?
- What job family am I in? Do I understand the behaviours, skills, knowledge that are necessary for me to perform effectively (competency statements)?
- What have I achieved during the review period / since my last meeting? Can I evidence this and provide examples? (Use your notes from 1-2-1s)
- Can I provide explanations for objectives that have not or will not be achieved?
- What do I enjoy most about my job and how might I want to develop within my role?
- Is there any aspect of my work in which improvement is required and how do I feel this might be achieved?
- What are my key strengths?
- What development areas have I recognised that impact on my performance within my role?
- What are my learning and development needs and can I provide valid reasons to support the case for specific development?
- What is the level of support and guidance I require from my Line Manager, team members etc?
- What are my aspirations for the future in both my current role and in possible future roles?
- How do I feel the team is performing?
- What do I feel my objectives are for the next period?

The Line Manager

In your role as Line Manager you will need to prepare for Managing People and Their Performance meetings by considering:

- The current priorities, objectives and targets of the Council, Service area and Team
- The job duties and expectations on the individual
- The job family the individual is in. Does the individual understand the behaviours, skills, knowledge that are necessary to perform effectively (competency statements)? Are they performing well against these? What skills / knowledge / aptitudes are most relevant? Have I communicated this? How can any development areas be addressed?
- How well the individual has performed since the last meeting
- How well the individual has performed over the past year, with evidence from minutes/notes/ action points from regular 1-2-1 meetings
- The extent to which any agreed development plans from the last meeting have been implemented
- The feedback to be given at the meeting and evidence and examples that will be used to support it
- The factors that have affected performance that are both within and outside of the individual's control
- The points for discussion on the possible actions that can be taken by both parties to develop or improve performance
- Possible directions the individual's career might take
- Possible objectives for the next review period.

What makes a good Managing People and Their Performance meeting?

A **GOOD** Managing People and Their Performance meeting is one in which:

- The individual does most of the talking
- The Line Manager listens actively to what they have to say
- There is scope for reflection and analysis
- Performance is analysed – not personality
- The whole period is reviewed and not just isolated or recent events
- Achievements are recognised and reinforced
- Performance issues are addressed with discussions about the way forward
- There is a positive conclusion with agreed action plans and dates for the next meeting
- Both parties leave the meeting knowing what they are expected to do, by when and how they need to do it. (See Section 4 for Guidance on Creating Action Plans and Objective Setting.)

A **BAD** Managing People and Their Performance meeting is one where:

- The focus is on failures or omissions
- The Line Manager controls and/or dominates the meeting
- Feedback is subjective and destructive
- There are no specific examples or evidence
- Either party refuses to engage in the discussion
- The meeting ends with disagreements between the individual and the Line Manager
- Objectives set are not SMART
- There are no obvious outcomes or actions.

TIP... To conduct a successful Managing People and Performance meeting you will need to be able to communicate effectively – advice and guidance on effective communication can be found in Section 5 of the guide.

The Annual Formal Performance Review allows you to review both individuals and teams. More detail on this can be found in Section 6 of the toolkit.

Manager Checklist

Must Do's

Action	Completed
Hold regular 1-2-1 meetings with the individuals you manage to discuss performance, progress against objectives, general work issues etc. Use the Notes form 1-2-1 Meetings form to plan and keep records from these meetings.	
Hold regular team meetings to discuss performance, communicate progress, communicate change etc	
Produce agendas for and minutes from team meetings	
Monitor your team to ensure that individuals are using Action Plans as a live document and complementing this with the Notes of 1-2-1 Meetings Form, for example, following 1-2-1s / formal reviews / completion of development etc	
Keep your own record of outcomes from 1-2-1 meetings (See 1-2-1 Meeting template)	
Undertake an annual formal review of performance with the individuals and/or teams that you manage using the toolkit as a guide (see Section 6)	

Recommended

Action	Completed
Consider the 5 Ps when setting up meetings	
If appropriate, give the individual responsibility to set up regular 1-2-1 meetings (monitor to ensure taking place)	