

# Change to the performance management framework

## What is new/different?





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# Introduction

Part of the Secretary-General's (SG) vision for the UN is to move away from a process focused performance management framework to one with accountability for results. Most people agree that performance management is necessary to plan, assign, monitor and evaluate work. We are after all a mandate driven Organization whose work has significant impact and we need to hold ourselves accountable to deliver. But we also know that performance management can sometimes seem like a box ticking exercise and we want to make sure that it functions as a process that is useful to your needs.

But we also know that every team is different, with different needs..... for this reason we have retained and reinforced some of PM's central tenets while at the same time streamlining the process and giving managers and teams the flexibility and freedom to make the process more meaningful for them/you.

## PERFORMANCE MANAGEMENT DEFINED

Performance management is an accountability tool to help us plan, assign, monitor, and evaluate work but it cannot exist without:

- A facilitative leader
- A collaborative team
- Development minded individuals
- Trust and psychological safety

Effective performance management is a continuous, holistic approach to engaging everyone in the organization in a collaborative and agile process, to improve staff members and their performance in line with the organisation's objectives.

## Your performance matters!

# Summary of what is new and different

Currently performance management can be described as process driven, system focused, compliance based box ticking exercise but one that did not always meet the needs of teams...

So what is new.....

The organisation seeks to establish a culture of accountability and empowerment built on ongoing and meaningful performance conversations.

## 1. The biggest change is a mindshift

- Realise performance management is a valuable tool for supporting staff member's development and improvement
- Shifting the manager's role to that of "enabler of talent"
- Moving from an individual focus to a team focus (embracing a culture of collaboration)
- Empowering staff members to own their performance

## 2. Updates to Inspira

- The performance document is your one stop shop
- Your workplan will be developed outside of the tool and then uploaded to Inspira as an attachment. Midpoint reviews have been removed from the tool.
- Additional supervisors can provide input to the review outside of Inspira, as only one FRO will be able to complete the review online.
- Streamlined end-of-cycle review

## 3. Focus on continuous performance conversations and goal management

- Year-round discussions on goals and progress supported by a focus on growth, learning and improvement
- Also leverage existing conversations to talk about performance

## 4. A different approach to include competencies and values

- No longer individually evaluated

## 5. Establishing a feedback culture

- Sets the stage for a real organisation wide feedback culture
- Senior Leaders leading by example
- Managerial accountability increased by considering supervisee's feedback
- Establishing a feedback culture
- Forward focused conversations
- Holistic approach considering development, improvement, praise, coaching, performance support and guidance, etc.
- Foundation of praise and recognition to create space for development feedback

# Shifting to a new approach in performance management

The performance cycle starts on the 1st of April each year and ends on the 31st of March the following year.

WORKPLANS	
HOW IT WAS	WHAT IS NEW / DIFFERENT?
Workplans are created in Inspira at the start of the cycle (April/May) and could be edited or adjusted until the midpoint review, but not after.	Workplans will be created and uploaded as a document on Inspira. Advice will be given on minimum elements that are to be included in the template to ensure consistency. Workplans should be tailored to the needs of the staff member with the level of specification necessary to convey expectations. Workplans can be updated if needed to ensure that they remain relevant.  Not a one size fits all approach! FROs and Staff members are welcome to record their workplan in a format that works for them and upload the document to Inspira.
Competencies and values were separate sections included in the standard format workplan on Inspira.	Competencies and values need to be taken into consideration during the workplan discussion while embedding them into the workplan goals.
Every staff member has the option to complete a development plan summary on Inspira as part of their workplan.	The development plan summary is not in Inspira anymore. However, a discussion on development and career advancement is an integral part of your performance planning discussion and a summary can be included in the workplan document.







# FROM MID-POINT REVIEWS TO CONTINUOUS PERFORMANCE CONVERSATIONS



HOW IT WAS	WHAT IS NEW / DIFFERENT?
<p>Compulsory mid-point review was required to be held in October/November each year to review progress and address any performance shortcomings that need to be corrected.</p> <p>Regular dialogue about performance was encouraged in the policy but no clear guidance was provided.</p>	<p>There will no longer be a formal mid-point review step in Inspira and no forced, fixed, artificial milestones that don't meet team needs. FROs and staff will agree on a frequency of discussions at the outset of the cycle, and FROs will document these discussions outside of Inspira.</p> <p>Shift focus to regular and continuous performance conversations and prompt realignment of goals and redirection of effort, as and when required. Managers will leverage their existing interactions with staff and set milestone check-ins at times that meet their team's needs. Management also identifies and recognise outstanding contributions throughout the year.</p> <p>Continuous performance conversation involves ongoing feedback, advice, support and coaching of staff members by their FROs. The new approach encourages facilitative management where managers to adopt a coaching style to performance conversations.</p> <p>A culture of feedback is also to be promoted in which it is not only the manager who gives feedback but staff to each other as well as staff to their manager.</p>



## INTRODUCTION OF AN EFFECTIVE PEOPLE MANAGEMENT INDEX

### HOW IT WAS

Only reporting managers provided performance feedback during and at the end of the cycle.

Data on compliance with processes (e.g. % of workplans in place by the deadline) was provided to supervisors via the tool but the tool did not provide information on quality management and managerial effectiveness.

Managers were also evaluated for a wide range of managerial competencies such as leadership, visions, judgment and the competency of managing performance which is required for all those with supervisory responsibilities. It had several indicators focusing on managerial effectiveness.

### WHAT IS NEW / DIFFERENT?

As leaders of the Organization Directors (D1/D2) have a unique opportunity during this cycle to move us to embrace a feedback culture.

Directors (D1/D2) will be rated by their First and Second Reports through a questionnaire that provides input into their performance document. The questionnaire is focused on effective people management.

They will have an opportunity to do an self assessment during the cycle to identify which areas they could improve and will be provided with learning and development recommendations.

This will be implemented in a phased approach starting with D1/D2 managers at the end of the 2021/2022 cycle and extended to other levels in the subsequent cycles.

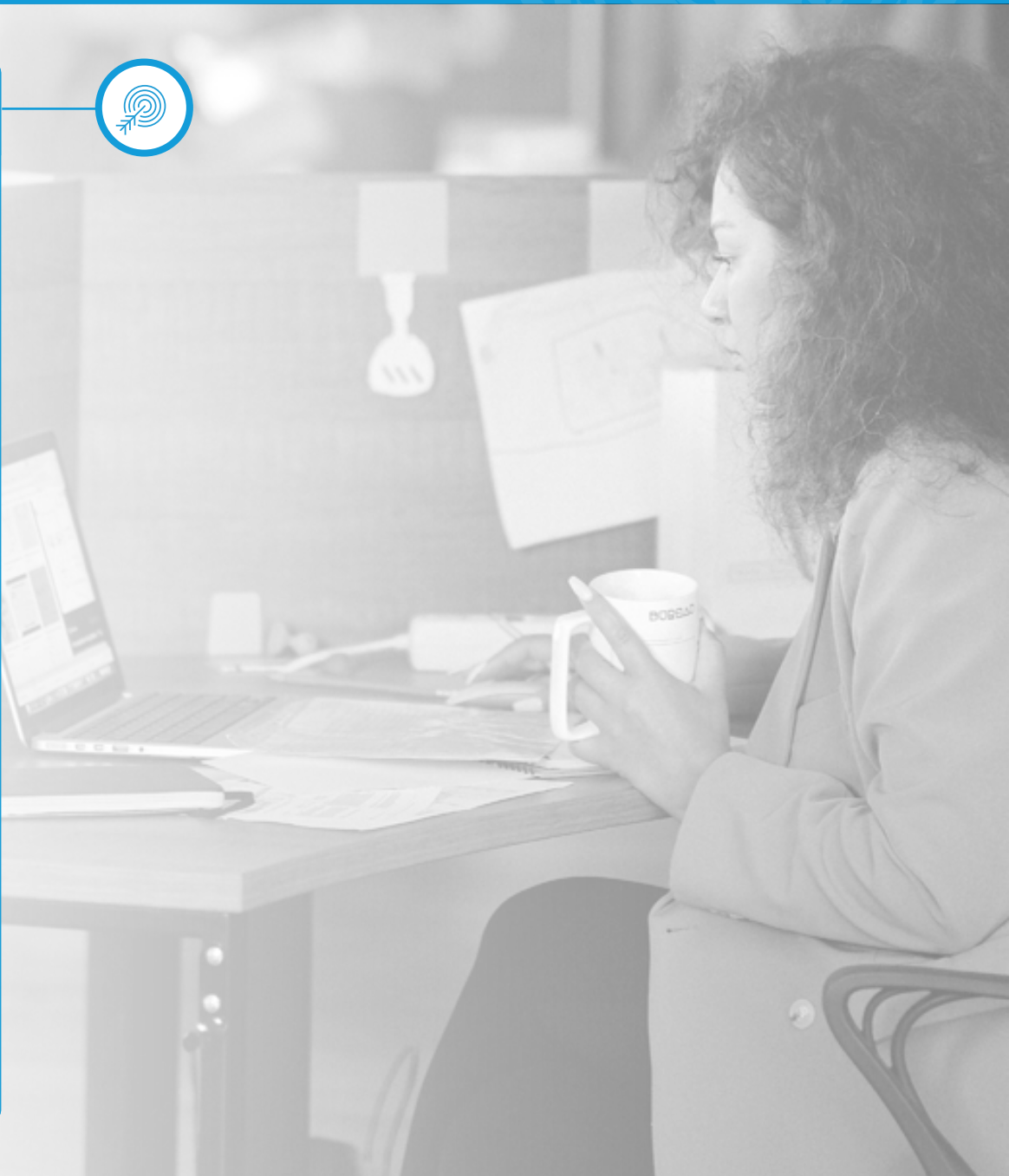




## END OF CYCLE REVIEW



HOW IT WAS	WHAT IS NEW / DIFFERENT?
<p>The manager evaluated the extent to which the staff member had achieved his/her goals and displayed the required competencies and values.</p> <p>Competencies and values were measured separately during the end-of-cycle review after which an overall performance rating was given taking these ratings into account.</p> <p>Managers had to confirm (on Inspira) whether or not 5 days of mandatory training was completed.</p>	<p>The FRO will evaluate the staff member on an ongoing basis and only record the overall rating in Inspira at the end-of-cycle with their comments.</p> <p>The final rating and comments take into account, the extent to which the staff member has achieved his/her goals and displayed the required behaviours, the ARO inputs and the effective people management, if applicable.</p> <p>Competencies and values will not be measured as such as part of the end-of-cycle review. In determining the overall rating, “how” the staff member performed his/her job will be as important as “what” was delivered.</p> <p>Ticking the box to confirm mandatory learning was completed is not on Inspira any more, however a focus on development/career is still critical as part of the end of cycle discussion.</p> <p>Workflow have been simplified to 3 easy steps:</p> <ul style="list-style-type: none"> <li>• Staff member completes self assessment</li> <li>• FRO complete end of cycle evaluation and adds comments</li> <li>• SRO endorses the rating after which the Staff member can view the final ratings</li> </ul>





## SUPPORTING MATERIAL AND GUIDANCE



### HOW IT WAS

Previously, all general materials related to performance management could be accessed on the HR Portal.

### WHAT IS NEW / DIFFERENT?

The HR Portal will have a strategic focus going forward as it is a site that is accessible to the wider public.

A new hub for all performance management guidelines, toolkits and help has also been created on the Knowledge Gateway called the PM Hub.

