Guidelines for a Developmental Review of Performance

The goal of the performance conversation: To leave the person better able to examine their work, make sound choices, and fulfill their commitments.

- Measuring the result matters. So does what the person learns from it. If you supply every judgment and prescribe every correction, you may leave them waiting for my next instruction.
- A development conversation brings the individual into the examination of their own performance.
- You provide facts, clarify standards, and address what needs attention. The person considers what happened, identifies what they need to improve, and accepts responsibility for the next action.
- This how a Developmental Review supports Agancy

From performance review to development conversation

- Traditional performance reviews often begin with the leader's assessment. The employee receives a rating, hears a list of deficiencies, and responds. When the conversation feels like a verdict on competence or worth, the person may spend more effort defending themselves than examining their work.
- So, you can change that starting point by inviting the person to examine the results first. "What worked?" "What did not?" "What did you learn?"
- Their answers show you what they recognize, where their judgment is sound, and what still needs attention.
- You listen with appreciation and respect, allowing them to describe their experience without replacing it with your interpretation.
- Then, examine the evidence together. A result may meet the required standard, exceed it, or fall short.
- You need to say so clearly and explain the basis for your assessment. Inviting reflection does not relieve me of that responsibility. It gives the person an opportunity to understand the result and contribute to the decision about what follows.

Keep the facts and the person distinct

- A missed commitment needs to be addressed directly. Calling someone careless or uncommitted adds a judgment about character that can obscure the issue.
- Identify what was promised, what actually occurred, and what remains unresolved. Those facts provide something you can both examine and act upon.

- For example, “The report was promised for Tuesday and arrived Thursday” identifies a result. “You do not care about deadlines” assigns a motive. The first statement allows us to examine the missed promise and its effect on others.

- The second invites an argument about what kind of person the employee is. Preserving dignity means treating the person as capable of accepting responsibility and correcting their actions.
- It does not mean protecting them from every consequence. A required standard remains in force, and an unresolved performance problem may require a decision by the leader. Respect belongs in that conversation as well.

Begin with the agreement

- Clarity of agreements is the foundation of accountability. Chapter 10 distinguished requests and expectations from commitments. Before reviewing fulfillment, establish what promise was actually made. A discussion that ended without an accepted commitment cannot fairly be treated later as a broken promise.
- The agreement needs to identify the person responsible, the result to be delivered, the applicable standard, and the completion date. It also needs to establish how fulfillment will be reported and when it will be reviewed. If we leave those matters unclear, you need to examine your own contribution to the confusion and help establish a workable agreement now.
- The person who makes the promise owns its fulfillment. The person receiving it holds the promise and reviews fulfillment no later than the agreed date. Both have a responsibility in the agreement.

Address a missed commitment

- When a promise has not been fulfilled, ask the person to examine what happened and what part of the result belongs to them. Circumstances matter because they help us identify what needs to change. They do not, by themselves, settle the responsibility for the missed promise.
- Useful questions move toward correction: “What prevented fulfillment?” “When did you become aware of the problem?” “What action did you take?” “What needs to be repaired?” I also need to examine whether I supplied the resources, information, or decisions I had promised. Accountability loses credibility if I apply it only to others.
- The conversation needs to end with a responsible next step. That may involve completing the original work, repairing its effects, changing the approach, or agreeing on a different commitment.

- Blame can consume the conversation; avoiding the issue leaves the result unresolved. An exact examination of the agreement and the actions taken gives us a basis for correction.

Honor the promise when circumstances change

- Integrity requires attention to a commitment throughout the work. If the person sees that fulfillment is at risk, they need to communicate while there is still an opportunity to respond. Waiting until the review date deprives others of information they may need to protect their own commitments.
- Renegotiation requires a new agreement with the person who holds the promise. Announcing a later deadline does not establish their acceptance.
- The original commitment remains relevant, including any effects of its being missed. An honest account of what changed and a clear proposal for what can now be delivered make responsible renegotiation possible.

Connect development to the work of the organization

- Individual development needs a connection to the Academy's purpose and required results. People need to know how their work contributes, which outcomes they own, and how success will be assessed.
- Where one person's work depends on another's, those responsibilities need to be visible as well.
- Regular reviews can reveal progress, obstacles, and dependencies while there is time to act. A system that waits for an annual rating may discover a problem after opportunities to correct it have passed.
- The leader remains responsible for setting direction and making necessary decisions. Within those boundaries, the individual needs room to choose an approach and exercise judgment. Development is weakened when every review ends with the leader taking the work back.

Turn learning into action and follow through

- A useful insight becomes developmental when the person applies it. Ask,
    1. "What will you do differently?"
    2. "What support do you need?"
    3. "What will you promise, and by when?"
- The individual needs to participate in creating the plan and accept the commitments it contains. Your proposed solution is not evidence of their ownership.
- Have an Action Plan Format ready to hold the place to record the actions, responsible people, and dates.
- Include the support you agree to provide and a date for reviewing the result.
- At that review, examine fulfillment and learning together. What improved? What remains unresolved? What further action is required?
- The test of development is the person's growing capacity to examine performance honestly and act responsibly

1. Are they recognizing problems sooner, asking for needed support, and making commitments they can honor?
2. When they can carry more of that thinking into their daily work, the conversation has strengthened both performance and agency.