A Guide to Productive Performance Conversations

Adults in Scouting

Scouts AUSTRALIA

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Background

Scouts Australia's Adults in Scouting Standard provides the context as to why having productive performance conversations are necessary.

> *Developing the performance of adults and teams is essential for improving the success of Scouts Australia. It is a means of getting better results by understanding and managing performance within an agreed framework of planned goals, standards and proficiency requirements*

To achieve this there will be times when conversations around an individual's performance be it objectives based or behaviour needs to occur. We should not shy away from this responsibility – it is an essential part of supporting all Adults in Scouting and to not do so can adversely impact our youth member's experience in Scouting.

Procedurally, the Individual Adult Volunteer Plan (Phase 4) has been developed as a tool to support and document this process. However, it is more an outcome rather than an input to the process and it is the outcome, or more rightly phrased "impact" that having these types of conversations are seeking to achieve.

This document has been developed to assist and guide people, with the "inputs" needed when involved in a performance conversation.

An important point of clarity is; this document focusses on "productive performance conversations" and not the handling of Complaints, Disputes or Grievances. Scouts Australia has "Conflict Management Guidelines" that help provide guidance when these types of situations occur and, in most Branches, there are detailed procedures that need to be followed.

Performance Discussion Types

There are broadly two types of performance discussion:

- Productive, and
- Improvement

That is not to say they are necessarily mutually exclusive. Often in a performance discussion the individual being offered support has demonstrated achievement of some objectives and (potentially) displayed behaviours consistent with the values, Code of Ethics and Code of Conduct of Scouts Australia. This means that the conversation needs to be balanced, acknowledging achievements and addressing those areas for improvement

Productive Performance:

Productive Performance is to recognise achievement. Ideally this achievement will be evidenced based (achievement of objectives and goals) with the result either being met, exceeded or key learnings coming from the tasks undertaken.

It is critical that an appropriate level of praise and recognition is offered for these achievements. General praising are platitudes at best and often can be interpreted as being insincere. The conversation needs to be specific, identifying those things that have been done well and the reasons why.

Constructive behaviours can be event based. Identifying specific examples of good behaviour and how it has benefited others as well as the reputation of the individual being offered support should never be underestimated in terms of making a positive impact for Adults and Youth. While many people prefer not to receive praise publicly, doing so privately can have a significant positive outcome and will often lead the individual being offered support to commit with further discretionary effort to support Scouting and others.

Improvement Performance

Improvement Performance based discussions centre on those objectives or behaviours that have not met the previously agreed expectations. Occasionally, there may be repeat conversations about the same issue – this is often the case when the issue is about inappropriate behaviour.

For objectives-based conversations the conversation can be about:

- Did they have the context right for the objective they were undertaking? Put simply did they understand why this task was important?

- Were they clear as to what the outcome needed to be? Did they know what success of behaviour expectations would look like?

- Did they experience barriers (reasonable reasons not excuses) that precluded them from achieving the outcome?

- Was sufficient time allocated for them to recognise and celebrate small wins along the way. Often many things go well, but all that is remembered is the last few things that could have been done better.

- How comfortable were they in engaging with their Team Leader or the person supervising the task? Did they feel supported?

Importantly, the principles of the Leadership Star need to be at play here in the nature and tone of the conversation:

Often an outcome is about resetting the objective. This can be what needs to be done and by when. Where this is the outcome, it is critical that the final task is agreed. Setting another unrealistic objective will not only lead to a similar outcome but potential for the individual being supported to disconnect from the task and potentially wider Scouting.

Wellness of Adults

The wellness of all members in Scouting and keeping well is critical. This is especially the case for our adults as sometimes our focus is so strongly on the young people in our units, that we forget the importance of all those people who are supporting them. The wellbeing of adults is essential in delivering authentic Scouting so that young people can receive the tailored assistance which they require. In Performance conversations making sure we have the wellness of the individual being supported needs to (also) be at the centre of the discussion. It is neither appropriate nor in keeping with Scouting values to enter a discussion with the specific intent for doing harm to another person whether it be verbal or written in nature. We must enter these conversations with a constructive mindset that encourages the individual being supported to acknowledge their current reality and reset with a desire to improve and deliver on their goals.

The Adults in Scouting life cycle provides a great framework for supporting the wellbeing of all adult members. Here we will explore this framework and how it is complemented by recent developments in the field of positive psychology, namely the PERMA Model (Seligman, 2011),

PERMA

The PERMA Model can be used to frame plans to support the wellbeing of adult and youth members.

> PERMA is an acronym for:
>
> - **Positive** Emotions – experiencing and reflecting on positive experiences and the emotions which accompanied them.
>
> - **Engagement** – deploying skills, strengths, and experiences to complete challenging tasks.
>
> - Positive **Relationships** – sharing experiences and fun with others while working towards a common goal.
>
> - **Meaning** – belonging to and serving something which is bigger than yourself.
>
> - **Accomplishment** – experiencing or supporting others to achieve, success

At a WOSM level the need for a better understanding of PERMA and the important role it plays in the lifecycle of an Adult in Scouting created a publication "The Wellness of a Scout Leader" that provides further helpful information when preparing for performance conversations. However, to precise the key messages in this publication (please note this is targeted at Program Youth Leaders so adaption for Program Support Leaders would be needed):

Positive Emotions:

The Lifecycle of Adults in Scouting clearly outlines a path to assist each person experience and reflect on their positive emotions. The training provided and social experiences which naturally occur enable adults in Scouting to reflect and share positively about the past Scouting experiences, for example that great campfire, the success of the young team who finally learned the skill, the joy at the Opening Ceremony of the Jamboree. From this, adults are motivated for present, and also future, challenges. Opportunities are built in at formal and informal training sessions, and annual reviews and final meetings of projects. Lasting happy memories and experiences spur people on to do even better things and stretch themselves further.

Engagement:

Engagement occurs when a person fully deploys their skills, strengths, and attention for a challenging task. What could be more challenging than volunteering to work with young people? In this situation there is no option to not to be engaged- the young people won't allow it! For most adults in Scouting, after being initially trained, including our Scout Method, the ability to work with young people in a safe, challenging environment and assist with their development is a great achievement. Great satisfaction is experienced when one's skills are sufficient for the activity chosen, the activity has a clear goal, and immediate feedback is received. Each of these are readily evident at any Scouting activity. The Adults in Scouting model promotes engagement by ensuring that everyone is properly equipped in order to succeed in tasks which interest them, as well as offering processes for ensuring that everyone receives roles which will challenge them, and that they receive appropriate feedback to ensure they can continue their own learning while helping others.

Positive Relationships

This element is based on the role that 'other people' are believed to play in positive psychology (Seligman, 2011). Of course, interacting and working with other people is central to Scouting, so from an Adults in Scouting perspective relationships, are fundamental to Scout operations and to wellbeing. The experiences that contribute to wellbeing are often amplified through our relationships with others- adults as well as young people. Scouting provides great purpose, highs, laughs, a sense of belonging, and opportunities to be part of a successful team which takes pride in its work. These connections to others are important. Working together on common goals with a shared purpose fosters strong relational blends and are often the basis of lasting friendships. Psychologically we know that supporting others when feeling down can be a reliable way to start feeling good about one's self. Doing acts of kindness for others produces an increase in wellbeing and this certainly occurs through the Scout programme.

Meaning:

Meaning, is the sense of belonging to and serving something which you believe to be bigger than yourself (Seligman, 2011). This is at the core of Scouting in that the sense of purpose is derived from belonging to and serving something bigger than one's self. As an Adult in Scouting, we are part of a Movement of 57 million people in over 170 countries of the world all working with a common purpose, to an agreed mission, using a common set of values. That would surely give a sense of meaning to anyone and we are reminded of our shared

purpose each time we put on the Scout scarf and is reinforced at large gatherings such as JOTA-JOTI and Scout Jamborees.

Accomplishment:

Accomplishment, which is based on the assertion that success, winning, and achievement are often pursued for their own sakes (Seligman, 2011). This is possibly the most overlooked component of PERMA from an Adults in Scouting perspective. Most people want to do well at their task. This is certainly the case in Scouting where we make a promise to do our best and agree to the Purpose of Scouting. The lifecycle of an Adult in Scouting considers personal accomplishment an important aspect that is considered in annual reflections with peers or leaders. As an Adult in Scouting, part of the Mutual Agreement indicates the importance of having the skills required to perform a certain duty, with training and support available as required. Often when we think of the accomplishments of Adults in Scouting, we focus on the recognition of them. While many tend to focus on formal recognition via awards or presentation of a Certificate, there are actually many different ways to recognise and celebrate accomplishments with a private 'thank you' being enough? However, during this process it is important to remember that, at the core of this work, we are recognising and celebrating an individual who had the opportunity to thrive and experience success in Scouting. A key to volunteer wellbeing and retention is that, in our planning, we ensure that we are creating exciting opportunities and supportive environments, through our structures and the supports which we provide, to ensure that every Adult in Scouting has the opportunity to thrive, to experience success, and to accomplish their goals.

By applying the PERMA approach in our conversations, we are not distracted from having the well-being of the individual to be supported at the centre of our thinking. Our own language and emotions will be formed by this mindset and will almost certainly lead to a more productive conversation.

Value of Team Based Feedback

Often the feedback provided comes from the Team Leader to the individual being supported. A question that arises is how balanced is this feedback? That is: does it come from one person's view or multiple views? And, if it comes from multiple views how does this impact the validity of the conversation and more importantly, the actions that are taken?

Contemporary research (Gartner) shows that there is a 3.5% increase in the utility of performance management and a 14% increase in an individual's performance when the individual is evaluated by their peers with interconnected work and shared goals. Despite the reality, only 17% of respondents to a recent Gartner survey said individuals were evaluated by their teams, while 99% said that Team Leaders evaluate individual's performance.

> **"Collecting and including team feedback in performance conversations enables managers to share a holistic picture of employee performance,"** says Brent Cassell, Vice President, Advisory, Gartner.

So, how can this be applied in Scouting?

- Develop a simple instrument that seeks to gather key relationship feedback from peers about the objectives and stakeholder interactions the individual being supported should have achieved.

- Make sure that the individual is nominating the peers to whom this request is to be sent and agree that up front. In this way there is an acknowledgement that those providing the feedback are mutually agreeable to both parties.

- Encourage the individual to be supported to complete the same analysis. The Individual Adult Volunteer Plan (IAVP) documentation will assist here.

- Using the data returned discuss how the individual being supported contributed to the team's performance and objectives and how their actions or behaviours may need to change to improve overall team performance. *More on this later*

- Utilise examples from others to fill any gaps in your assessment.

- Understand any discrepancies between their self-evaluation, team feedback and your evaluation and work to reach agreement as to why there is a discrepancy. Sometimes, the individual being supported does realise how they are perceived. This can be a moment of reality truth

"There's nothing about your performance that you need to change ... other than everything."

10 tips for Effective Performance Conversations[1]

(Refer Attachment "A" – Checklist)

1. <u>Actually, do them.</u>

    This may be stating the obvious, but often we hear in Scouting that people rarely-never hear from their Team Leader, or if they do it is only when something goes wrong!

    Making sure that regular catch-ups, performance reviews is part of a Team Leaders operating rhythm will ensure that any issues or concerns are addressed early and more importantly that a redirection for success occurs in a timely manner.

    One of the key reasons Team Leaders shy away from having performance conversations is the fear of confrontation. Here it is essential to focus on playing the issue not the person. Being factual and evidenced based will be a cornerstone of a productive conversation.

2. <u>Be prepared</u>

    Team Leaders need to prepare themselves and the individual being supported before the performance conversation and have specific, value-driven advice and issues to discuss. Team leaders who show up unprepared, rush through the process and don't really say anything meaningful leave the individual being supported feeling the whole conversation is a charade and that the discussion was disingenuous and pointless. The IAVP Phases will assist here.

3. <u>Set the Agenda</u>

    The best way to ensure that both the Team Leader and the individual being supported are prepared is to create a meeting agenda and send it to them. Team leaders should also ask if there is anything specific, they wish to discuss and include that in the agenda too.

    Formalising the review process will help to set clear expectations so nothing shocks or discourages the individual being supported and it is critical that at no time should this feel like an ambush.

    Also, it means that there will be some structure to the conversation, that you will both get more out of it and it'll be easier to make a record of everything that is discussed. Sometimes (and this is one of personal choice) the recording of what is agreed should be done by the individual being supported. There is some evidence that where this is done the likelihood of follow through is higher – *"they who grow are the holder of the pen" Again the IAVP process provide the structure for this.*

4. <u>Be positive</u>

    Avoid performance conversations being too overwhelming. This can be done easily by holding more regular interactions during the year. Saving up all the issues for one big dump of negativity/criticism is more likely to disengage the individual being supported

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[1] Adapted from Coburgbanks UK - https://www.coburgbanks.co.uk/blog/staff-retention/10-tips-for-conducting-a-performance-review/

than engaging. People who leave a conversation feeling uncomfortable, unhappy and completely undervalued are less likely to change.

Remember to talk about the positives, thank the individual being supported for their hard work and, when discussing the negatives, be constructive; how can you work together to resolve the problem or issue?

However, if there (really) aren't any positives then consider why and whether this person is right for your team. The Decision for the Future – "Retirement" may be a better option.

5. <u>Be honest</u>

It is fundamental to our Scouting values, Code of Ethics and Code of Conduct but at all times be open and honest and at all times discuss the issue directly with the individual being supported. Team leaders will lose the respect and confidence of their team where they openly discuss a person's performance with others before speaking to the individual being supported.

Some Tips:

- Never be rash and go straight to punishment (unless they suddenly do something awful) and never just assume that 'they'll get better' without you saying anything. They may not even know that they're going wrong!

- Team Leaders who are too quick to discipline often face disloyalty and distrust from their team.

- Conversely if they have done a good job, tell them so. Don't be afraid to praise people; it will often motivate them to work just as hard (or harder) in the future.

- Don't make promises you can't keep or don't have the authority to implement. It is not always the responsibility of the Team leader to provide the solution.

6. <u>Listen and respond with empathy</u>

Listening means:

- asking open questions and then being silent to wait for the response. Team Leaders must resist from answering the question for the individual being supported. Never ask closed (i.e., yes/no) questions.

- Responding with empathy – consider how the person is feeling, where is their mindset. If you were in their shoes, how would you feel about the conversation

- Writing down their responses. Often it is a good strategy to paraphrase back to the individual being supported what they have said to make sure this is their intent and meaning and that it is accurately recorded.

7. <u>Set SMART goals</u>

Goal setting needs to be an outcome of any performance conversation. Before the conversation, the Team Leader needs to thoroughly consider what the expectations are for the future, how the individual to be supported has improved so far and whether they actually have room for improvement.

The Team Leader needs to (also) consider how they can support those new goals; perhaps by offering more training, support or resources.

Always make sure those goals are agreed and documented and that they follow the principles of SMART goals: specific, measurable, action-oriented, realistic and time-based.

8. <u>Discuss their future hopes</u>

People want to know that they have opportunities to progress, grow, challenge themselves and thrive in Scouting. So, performance conversations are the ideal time to discuss this. Ask them:

- What are their hopes for the future?

- Are they happy in their current role?

- Could they benefit from further training?

By not being across this the individual being supported may chose the leave option rather than stay.

9. <u>Seek feedback on your performance</u>

This is a great way to grow mutual levels of engagement. By being vulnerable to feedback the Team Leader demonstrates "reverse empathy". The individual being supported feels a level of mutual engagement, a safe environment where concerns they have about their Team Leader can be shared in such a way that is non-threatening.

However, this needs to be a genuine approach. If the individual being supported feels this part of the process is contrived or a "tick a box" exercise more damage than good will come from the conversation.

10. <u>Continuous connection</u>

Just because the performance conversation has concluded this does not mean that all connection with the individual being supported stops. Performance conversations are continuous. They can work informally. The chat over a cup of coffee check-in as a follow-up is just as powerful and reinforces the primary focus of being there to helps, support and grow.

Behaviour Misalignment

From time to time the behaviour of the individual being supported is at odds with the values, Code of Ethics and/or Code of Conduct for Scouts Australia. When this happens the need for a performance conversation centred around the behaviour misalignment becomes urgent. Allowing the incorrect behaviour to continue may see:

- a one-off occurrence become endemic and lead to deeper issues

- other members of the team disassociate with the individual being supported and lead to low team morale

- it creates a situation for a difficult conversation later

- it develops distrust in the Team of the Team Leader's capability to deal with behavioural issues

- a belief that a behaviour is acceptable because it has been allowed to continue

Some quotes to remember - "Act now not later" and "The standard you walk past is the standard you accept" – should be first and foremost in the mind of the Team Leader

The IAVP Phase 4 approach to Performance Conversations recommends an approach that has been found to be useful. Below are two options for Team Leaders to consider:

BEER[2] Discussion Tool	BIFFO[3] Coaching Method
• **Behaviour** - What is it that an individual is doing (or not doing)? Be specific. • **Effect** - How is this behaviour impacting other members of the team (including youth members)? • **Expectation -**What should occur and by when? What is needed for this to occur? • **Result** -If the expectation is met what is the result going to be? If it is not met what might the result be?	• **Behaviour** – What behaviour did the individual display that requires addressing? Be specific. • **Impact** – What impact did this behaviour have on individuals, the team, the yourself? • **Feelings** – How did this make me feel? • **Future** – What would we like to see from the individual/team going forward? Document the approach • **Outgoing** conversation – What else is needed? Sharing options and gaining acknowledgement

The two models are very similar and are really one of personal choice. The key theme though is what is it the person is doing? how does this impact others? what is it that should be happening? and how are they going to get there?

In time, individuals in a team will recognise they need to self-correct when their Team Leader says "it is time for a BEER conversation or I think we need to have a bit of BIFFO".

Managing Emotions

The Office of the Fair Work Ombudsman (Australian Government) provides an excellent resource in having "difficult conversations in the workplace". Although targeted at employers/employees, and thereby addressing employment relations matters there is value adding insights for those involved in the volunteer sector.

One key area when entering into a performance conversation is about managing emotions and here, we are speaking about the emotions of the Team Leader. Below is an adaption from this Australian Government publication

Understanding emotions

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[2] Source: The Art of Leadership – having difficult conversations
[3] Source: CX Central – guide to feedback

People behave the way they do for a reason. Generally, we look for ways to belong, feel significant, and protect ourselves and our self-esteem – refer the information above on PERMA. We have positive emotional responses when our needs are met, our expectations are fulfilled and our beliefs are confirmed. When they are not, we may display a range of negative emotions, including nervousness, anger, frustration, or fear.

Often performance conversations go wrong because of the emotions involved – not because of who is right or wrong. A Team Leader has a key role in managing both their emotions and that of the individual being supported.

Managing the Team Leader's emotions

Team Leaders need to approach the performance conversation rationally and objectively. It is very difficult to have a rationale conversation with an irrational person. In order to have a rationale conversation a Team leader must first acknowledge any emotions being displayed. Being angry or defensive will rarely result in the desired outcome. Team leaders need to think about what their body language is saying: does it signal that they are approachable, non-threatening and ready to talk and listen?

Using a low and calm tone of voice may say more than the actual words used.

As suggested above be empathetic during the conversation. If getting worked up, it may help to take a deep breath or silently count to 10 before speaking.

Speak slowly and avoid using long complex sentences. Try to use clear, direct, fact-based communication.

Team Leaders need to consider their view of the individual to be supported. If angry with them or a poor relationship exists, it may affect the ability to resolve the issue successfully. Focus on the issue not personal feelings or the person involved.

Managing the individual to be supported emotions

It's quite likely that Team Leaders' will face negative emotions during a difficult conversation. Individual's to be supported are likely to feel nervous, defensive, sad, frustrated or afraid when having a difficult conversation, especially a performance conversation.

Don't just focus on the content of the conversation – pay attention to the emotions as well. Listen to the words and the feelings.

<u>Strategies for Team Leaders</u> in handling difficult emotions in others include:

- showing genuine interest in what they have to say

- expressing support and reassurance, for example "I can see this is hard for you" or "It's ok to be upset about this"

- remaining calm. If Team Leaders are emotional and upset it will only make the individual to be supported more upset. Manage self-reaction (don't become inflamed or defensive)

- apologise, if appropriate. For example; "I am sorry I am not able to approve this request at such short notice"

- do not make a promise that cannot be fulfilled just to diffuse the emotional reaction of the individual to be supported

- reinforce the behaviour required. For example, by saying: "I am really happy with the way you have taken this feedback on board" or "It is good that you are open to discussing this topic"

- show taking account of their emotions and their needs, for example "So how do you feel about what we have discussed and decided on?".

Things to watch out for:

- Reacting to demands or threats.

- Making accusations or laying blame, such as "You did…", "You are…" or "You told me that…". Avoid the use of the word 'you'. Doing this keeps the conversation focused on the impact of the behaviour rather than blame.

- Relying on assumptions about what the employee has said or thinks. Check that your assumptions are valid and be prepared to adapt.

Above all else trying to remain calm and not react without thinking first should be the approach. Often a good practice is to find a trusted friend who may in confidence assist with a debriefing. Just like the Plan>Do>Review> practices in the Youth Program so to should this be applied in performance conversations post the discussion.

IAVP

The Individual Adult Volunteer Performance Plan (IAVP – Phase 4) is a tool to assist Adult Volunteers and Team Leaders document, discuss, and agree expectations where the performance of an adult volunteer has not met previously agreed expectations.

Completion of an Adult Volunteer Performance Plan may be triggered by

- Not achieving the Certificate of Proficiency relevant to the role within the agreed timeframe
- Not achieving the Wood Badge within the agreed timeframe
- Performance issues identified within the Adults in Scouting Lifecycle review period which need to be addressed prior to deciding recommendations for Reappointment, Reassignment, or Retirement.

The Adult Volunteer Performance Plan is not a replacement for a Branch's Complaints Policy and procedures however its completion may be an outcome of that process.

Decision for the Future

The life cycle of an Adult in Scouting:
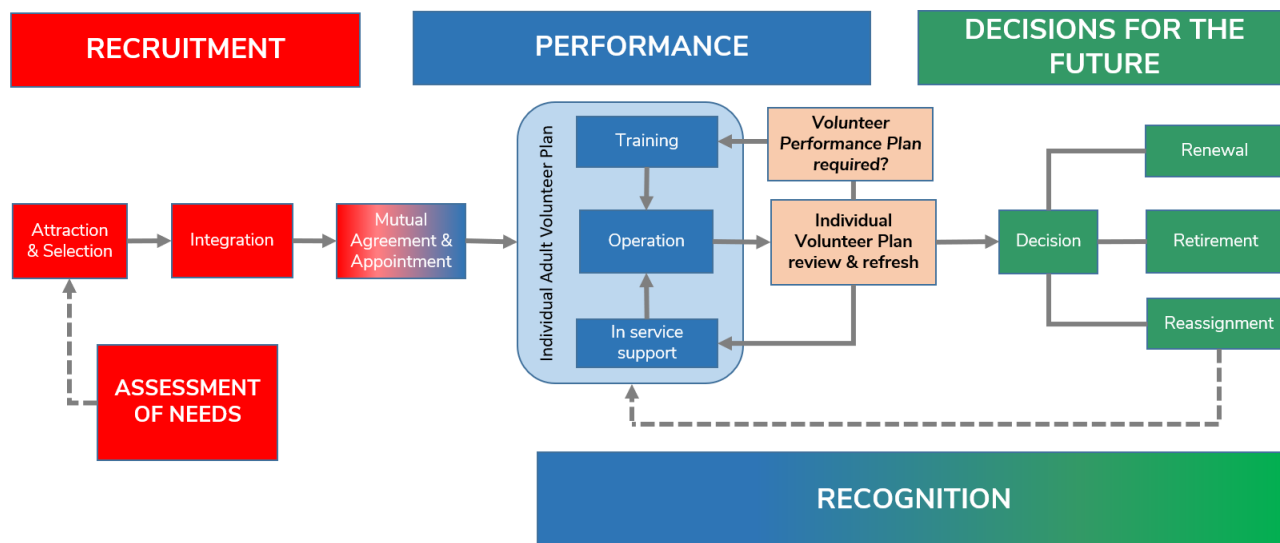
has, as its final step, "Decisions for the Future". In principle there are three decisions that should be made following any formal performance conversation

Renewal

The renewal of an adult's role or function happens after a satisfactory appraisal and a discussion with the person or team responsible for making their appointment (often their team leader). In this process, the adult will receive constructive and timely feedback and advice about their future within Scouting.

Scouts Australia encourages the support and training of the people in charge of the appraisal process to help them to avoid mistakes and difficulties.

Reassignment

Reassignment of one or more Individuals to another role or function within Scouting is used as a means of refreshing the team, a developmental opportunity for the individual or an attempt to find a role or function better suited to the individuals' skills, talents or commitment level.

The reassignment of an adult to a new position or function happens after a satisfactory appraisal, as a personal decision or in case the appraisal was not satisfactory. None of the reasons for a reassignment should be based on major non-conformities. As part of the process, the adult submits candidacy for another position or function and is selected.

Retirement

In some circumstances, retirement may be the best option for an adult. The retirement of an adult from the organisation may happen because:

- the adult took this decision voluntarily (e.g., they wish to do other things or they don't consider themselves suitable for a role in Scouting)

- the organisation and the adult responsible for follow-up and appraisal determine that there are major non-conformities
- the position or function ceased to exist

Regardless of which decision is made, the principles outlined in this document of a fair and fact-based discussion needs to be the foundation on which any decision is made.

Wrapping it all up

The essence of this document is that with careful planning and preparation performance conversations can be satisfying for all parties. Both the Team Leader and the individual being supported should feel they have explored all areas of the performance, had open and honest conversations, done so in a timely manner and have determined a way forward that is mutually agreeable and advantageous to both parties.

Sometimes the conversation needs more than one "sitting" and that should be understood and agreed. Alternatively, the Team Leader may need to reach out to a specialist in their Branch to help guide them through the process and/or act as an independent observer.

The main thing is that the conversation is happening and that it is seen as an acceptable and important part of Scouting.

10 Step Checklist

The following checklist has been developed for Team Leaders to help in enabling Productive Performance Conversations.

As the Team Leader, I have ……

- ☐ 1. scheduled regular catch-ups with my team members

- ☐ 2. planned what needs to be discussed and how

- ☐ 3. set an agenda and communicated it for our catch-up

- ☐ 4. identified the positives I wish to share with my Team Member

- ☐ 5. made sure that I will respect the Code of Ethics and Code of Conduct in my words and actions

- ☐ 6. Planned to use open questions, listen to the person (avoiding to interrupt), responding with empathy and writing down their responses

- ☐ 7. set SMART goals with my Team Member

- ☐ 8. discussed their future hopes and needs

- ☐ 9. sought feedback about my own performance and interactions

- ☐ 10. maintained a focus on continuous connection

By adopting a structured approach, I will avoid missing things and will optimise the time spent together.