Guidance for Remote PDRS

In light of the disruptions caused by the COVID-19 pandemic the University has extended the deadline of the current PDRS cycle to December 31st 2020. Many staff may now be reaching a scheduled date for their own performance review or be in the process of arranging meetings with their team.

Whilst recognising the challenges imposed by a move to remote working it is important to continue performance and planning discussions. Performance reviews are a great way to connect with employees during this unprecedented time in order to assist them in the performance of their role. In many cases, the process of performance reviews can help provide some sense of normality and allow Reviewers and Reviewees to step outside of the current space to connect and reflect on the best approach to performing their role. It may also assist alignment of expectations given current restrictions.

The following are guidelines for a virtual PDRS meeting

1. Know your Tools for Virtual Performance Reviews

Utilizing technology is key to ensuring the annual review is a meaningful experience for both Reviewer and Reviewee.

An online ePerformance System has been made available as part of the University's Performance and Development Review System (PDRS).

You can log in to the system at https://ucceperformance.simitive.com using your UCC email address and password.

Video conferencing is a more suitable tool for the meeting itself than a phone call because it provides visual cues. People will be more comfortable with the conversation when they are able to see the nonverbal cues and know that they have your full attention. While there are many online options available, UCC IT supports the use of Microsoft Teams and Google Meet.

The Reviewer and Reviewee should agree on the meeting format and discuss any needs for technical support requirements for a virtual meeting. Finding a comfortable balance around both reviewer and reviewee needs in terms of PDRS meeting arrangements may be important.

2. Schedule a mutually agreeable date and time for the performance review and planning discussion

The review should be arranged with plenty of notice, so both have time to prepare. Allow up to an hour for discussion with some extra time allocated in your diary, in case of any technical difficulties. Employees working from home may be distracted by children, pets, or other concerns, so a degree of flexibility may be required in finding a mutually convenient time. There may also be a need to be flexible around the timing of meetings as agreed between Reviewers and Reviewees. If the Reviewee requests a colleague to sit in or selects the Peer Committee approach this can be facilitated in the normal manner.

3. At least one week before the review, the Reviewee should submit Part A of the form to the Reviewer

This is an opportunity to reflect on one's performance to date and to set future work objectives. A work objective is a mutually understood agreement about a specific work outcome that a staff member is expected to achieve within the next 12 / 24 months. During the COVID-19 crisis, it is very difficult to plan 12 months in advance. Our reality is changing every day. This means that any plans or targets that you set should be flexible and cognisant of our changing work environment.

Most people will have a number of pre-covid performance objectives established. However, the new environment brought on by the pandemic may have made these less achievable or relevant. Setting new realistic objectives can motivate staff and focus their attention on the personal and work goals that are feasible and applicable during this change.

4. Considerations in advance of the meeting:.

- Turn off notifications and close all other windows/tabs. Just like when speaking in person, your remote 1-on-1s should be held, as so far as possible, in an environment free of distractions: both physical and virtual. Before your discussion make sure to turn off any notifications. If you see an alert for a new message, you may be tempted to have a glance during your conversation. Even a quick glance will signal to the other person that you're not fully invested in the discussion.

- Performance reviews are not to be recorded as this is not provided for in our policy. Many may already be aware of the legislation relating to *audio-visual* recording of meetings which requires advanced permission of both parties.

- Pay close attention to expressions and body language when using video tools. It may be easy to forget your body language when outside of an office environment, however it should be noted that 55% of all communication is body language.

5. During the Meeting:

- The Reviewer opens the meeting, introducing the format of the meeting. The Reviewer should start the discussion by asking the team member for his or her view first, e.g., how they view the changed job and work environment, are there issues with technology, what expectations do they have of you or their virtual teammates?

- The Reviewee talks the Reviewer through Part A of the form, leading to mutual discussion of content. It may be helpful to use screen sharing to display talk through the form together.

- The Reviewer gives feedback on contribution/ performance to date. Focus on the full year of job performance, not just recent events that required adjustments. Be understanding of the impact of the COVID -19 pandemic on colleagues perception and experience of their own performance at a personal and professional level e.g. there may be goals which were of high importance to the staff member which cannot be achieved during the current time.

- During the current time employees might not be as productive due to crisis-induced circumstances therefore it is possible that you will need to draw on your discretion as a manager in terms of what is realistically needed and achievable. Adjustments to fully-remote work, dealing with unexpected life changes, or juggling caregiving or home-schooling responsibilities may be some aspects impacting performance. Be prepared to address these with a knowledge of the well-being and staff development offerings.

- There may need to be an awareness work feedback being given in what would have been up to now a non-work environment With the challenge of not being face to face with the person there is scope for messages to be misunderstood. To avoid this, seek clarity, summarise and ensure mutual understanding of what is being discussed.

- In line with PDRS policy, at no stage should this meeting address discipline matters. Operating a 'no big surprise' approach, where there is an understanding on what is going to be discussed during the meeting, will facilitate parameters being set on the scope of the meeting.

- There is an opportunity for questions / clarifications. The Reviewer should solicit feedback. How can the Reviewer best support staff in the weeks/months ahead? What worked, what could be better for this and future discussions? This is also a good moment for a manager and employee to reset expectations around work hours, responsiveness during the day, and prioritization of tasks.

- Both Reviewer and Reviewee fill out Part B of the form in the last 10-15 minutes of the meeting

- There is mutual agreement of the wording and both sign off the form, the Reviewee can take Part B away and return within 5 working days

- Where agreement/ sign -off cannot be reached it is recommended that another meeting take place after a week or two. If agreement/ sign-off cannot be reached at this stage the process defaults to University Peer Committee.

6. Interim meetings to follow on progress/ performance

Having regular conversations and check-ins is important, but when managing your team remotely, they become essential and increased frequency may be needed. Employees need real-time feedback to deal with the changing work dynamics.

It's also important to bring employees together and hold virtual team meetings to keep a connection with team and individual goals. It will also allow teams adjust together on their everyday task focus.