Setting expectations

Performance management is a process, not an event. It operates as a continuous cycle and has five stages:

1. Planning for the year ahead;
2. Monitoring and measuring the employee’s performance;
3. Providing regular feedback – both positive and corrective;
4. Coaching and training;
5. Formal performance review (also known as performance appraisal).

The first stage: Planning focuses on setting expectations and goals. The employee’s job description, farm policy manual and code of conduct are good places to start.

The planning stage can occur at the end of the previous year’s review or as a separate meeting. It’s often helpful to opt for a separate meeting, that way everyone is fresh and willing to invest the time and effort needed.

Setting goals is a process of discussion and mutual agreement. For the performance management process to be successful, the employee needs to be actively involved in the conversation.

At a relaxed time and place, sit down together and agree on:

- The tasks and duties, standards and quality, timeframes and priorities. Refer to the farm policy manual, in particular any policies or procedures the employee is expected to adhere to.
- Expectations around behaviour at work e.g. cleanliness, teamwork, communication and attitude. Link this back to the farm code of conduct.
- Any targets or objectives for the coming year. You may have some targets for the farm – discuss with the employee the contribution they can make to this bigger picture. Make sure that your employee’s targets are realistic and that they can actually influence the results.
- Any personal goals the employee may have (for example around career development)
- Any ‘stretch’ goals – goals that offer challenge and interest and/or provide opportunities to develop new skills and knowledge
- The performance measures for each task/goal, specifically how it will be monitored, measured and reported

This information is collated together to form the Performance Plan.
SMART goals:

The SMART method is a simple and effective method for checking that goals and expectations are clear, measurable and realistic:

**S - Specific** – does the employee clearly know what is expected? New and inexperienced employees will probably require a much higher level of detail.

**M - Measurable** - are there performance measures in place? Does the employee understand how their performance will be monitored and assessed?

**A - Achievable** – can the goal be achieved within the timeframe?

**R - Realistic** – is the goal realistic given other pressures? Does the employee have the ability to actually influence the results?

**T - Timely** – is the employee clear about timeframes? When each task should be completed by, how frequently etc

Training and coaching:

Once you have agreed on the expectations and goals for the coming year, brainstorm what training and support the employee needs to achieve these goals.

Coaching is a very useful tool in this situation. Coaching involves asking the employee questions to enable them to find their own answers. Coaching helps grow employees’ skills, confidence and sense of accomplishment, and is one of the most effective ways of motivating staff to reach their potential. Useful questions to ask include:

- What are the options that might help you to develop your skills in this area? Let’s brainstorm all the possibilities.
- Of all these options, which one would best work for you?
- Which one should we concentrate on first?
- What are the next steps?
- Who should we contact to arrange this?
- Who else might have some ideas? Anyone else on the farm we should talk to? What about external people?
- What support do you require from me?
- What tools or resources will you need?
- What kind of follow-up would be helpful?

If the employee is stuck, start offering your ideas and suggestions as well. Be careful not to take over, they will have much greater ownership of the end result if they can choose the path that best works for them.

Remember the goal is to set the employee up for success. It is a win-win situation for both the employee and the employer. The planning stage is an ideal opportunity to make sure the employee has the knowledge, skills, resources and support needed to achieve the expectations and goals for the role and/or to put a plan in place to bring them up to speed.

Revisit both the performance plan and the training/development plan during your monthly catch-ups. As the employee grows in their role, they may be ready to take on additional tasks and responsibilities and this usually requires extra training.