Staff Performance and Development Review
Manager’s role in the staff performance and development review

Starting point for the staff performance and development review
After setting the framework for the meeting (time, agenda, degree of confidentiality, etc.), the starting point for the entire dialogue is the four four basic psychological needs and the staff member’s experience of the current situation.

The current situation
You begin the dialogue with the current situation as illustrated in the completed dialogue compass, and the staff member expands on what the individual scores mean. For example, the manager can ask the staff member to start by talking about the topic that they find most relevant/interesting. You can get a sense of whether some areas are a more pressing challenge than others. Thus, you can talk about each of the four number scores, but you can also talk about them in context as they often affect each other. You can talk about the four number scores separately for each need, but you can also talk about them in the context of the associated themes outermost in the compass. The purpose of the compass is to juxtapose things and create a holistic picture of the staff member’s well-being and work situation.

Based on the staff member’s compass and asking about the number scores in a curious manner, the manager enables a reflective conversation where the staff member has the opportunity to investigate, with the manager, the reasons for the number scores. This thus gives rise to reflection and learning for both parties, and they can ultimately qualify task completion, the need for competence development and the staff member’s motivation for this development (Lykke, Moltke, Molly, Nielsen and Reintoft, 2021).

Looking back and looking to the future
Once you have talked about the current situation, you can continue with a look back at the previous year (e.g. based on last year’s vitalisation compass), and finally you can talk about the future based on the staff member’s wishes for development for the four directions of the compass. You can talk about either of one or more of the four basic psychological needs and the associated organisational vitalisation conditions (possibilities for fulfilling these desires). That way, manager and the staff member maintain their curiosity in examining the challenges that exist between the current situation and the desired future. You can also talk about the direction for development, how the staff member gets there, and how the organisational framework can support this development. The manager and staff member come up with concrete suggestions on what it takes for the staff member to take the next steps in the desired direction and whether there are competencies that they need to develop.

Competence development plan
At the end of the dialogue, the manager and staff member fill out a competence development plan together that reflects the staff member’s desired goals for the future and how they achieve the future they want. It is important to ensure that both parties have a similar understanding about the agreements made. This document is binding for both manager and staff member in relation to future work on the staff member’s development. Manager and staff member may also agree when to follow up on the agreements made. The competence development plan is added to the personnel folder in WorkZone.
The dialogue contains three elements that both manager and staff member must be aware of: content, relationship and process. These impact the degree of success of the review.

- The content is often guided by a kind of skeleton for the dialogue that is based on the staff member's dialogue compass and what the manager and staff member find relevant to talk about.
- When the dialogue develops, this is often based on the relationship between the manager and staff member. The relationship can also shift in the dialogue itself, depending on how the dialogue process unfolds. Managers have the overall responsibility for holding the dialogue and should thus consider themselves as its host and manage the process.
- The process is about how the two parties talk about the content, how the staff member is involved, what questions the manager asks, and the manager's communication and relationship skills. The manager is responsible for being open, listening and being curious about the staff member's perspective (Lykke, Moltke, Molly, Nielsen and Reintoft, 2021).

Basically, the relationship between manager and staff member is asymmetrical. There is structural, personal and discursive power present in the dialogue and the relationship. The manager plays different roles in the dialogue when helping along the way (development potential): assessor (of the staff member’s competence needs in an organisational context) and decision maker (what the opportunities are for competence development). The manager must balance these roles to ensure that the dialogue makes sense for both staff member and manager, that together they agree on one or more development goals that comply with the staff member’s prerequisites and wishes as well as the organisation’s wishes (Molly, Nielsen, Reintoft and Lykke, 2019).

**Dialogue technique**

When conducting the staff performance and development review, the manager must be aware of their role and the way they relate to the staff member. First and foremost, it is important to make sure that there is trust in the dialogue. You can create this trust by being open, authentic, present, listening and curious in your communication and relationship with the staff member. You must have an open and curious dialogue, putting the staff member at the centre. Ask questions and listen to the answers rather than drawing your own conclusions. This gives the staff member motivation for development, and creates ownership and meaning. For inspiration, there are two conversation techniques that focus on understanding the staff member's perspective with regard to creating this motivation for development.

**Looking AS vs. looking AT**

Managers can take two positions in the dialogue: one where you observe the staff member from an outside view, as an object separate from yourself ('looking AT') and another where you seek to understand the perspective the staff member sees and experiences things from (looking AS). In the 'looking AT' perspective, you will, for example, notice the staff member's appearance, behaviour and ways of handling different situations. This is like standing outside a window looking into a room or at a situation unfolding and not being part of what you see. From a 'looking AS' perspective, you are curious about what it is like 'to be' the staff member. You step into the room or situation and experience it along with the staff member. You thus are an imagined part of the room or situation.

When you become aware of these two perspectives and how you approach them yourself, they can help sharpen your awareness of how the staff member in a 'looking AT' perspective functions and masters themselves and their tasks, and how in a 'looking AS' perspective you actually experience being the staff member in what they do. You can take both perspectives depending on where you are in the dialogue and what you need to know about the staff member (Divine 2009).
Active listening

When you need to understand the staff member’s perspective looking AS and be curious about who the staff member ‘is’ and why they have placed their number score in the vitalisation compass exactly where it is, active listening is a useful method. Active listening also helps to maintain/rebuild/develop trust, understanding and respect towards the staff member.

In all forms of communication, we take turns talking and listening, and can easily be influenced by our own interpretations and associations. When you do this, you may stop listening and instead draw your own conclusions that do not align with the other person’s message. It is an art to refrain from drawing conclusions on behalf of the other, proposing decisions and actions – even if with good intentions – taking a looking AT perspective.

To avoid looking AT, you can instead actively listen, be present and signal that you are listening to what the staff member says. In active listening, you do not simply listen to what the person says, you listen to the intention behind it, and you listen with curiosity and respect, trying to put aside your own assumptions, values and agendas. You must try to stay focused on what is being said and practice saying as little as possible, letting the staff member speak. In this way, you give the staff member space for reflection so that they see the solutions that feel right in the situation. This approach also provides an opportunity to create a shared understanding of the staff member’s perspective (looking AS).

What you can do is:

1. Listen to what is actually being said
2. Don’t be practicing what you want to say while the other person is talking
3. Be patient and don’t interrupt – it may take time for others to formulate what they want to say
4. Hold back on your own interpretations and associations. Don’t say ‘in my own words’
5. Ask clarifying questions (what, who and why) – more than you think you need to
6. Ask open-ended questions (ones that can’t just be answered with yes/no)
7. Use nonverbal signals to indicate that you’re listening
When managers conduct the staff performance and development review, they need to be aware that in every dialogue there is both a content level and a process level. That is, there is a difference between what is being said and how what is being said moves the conversation in a particular direction. As the 'host' of the dialogue, the manager must have an eye for both elements. You need to be able to intervene if the conversation is moving in an inappropriate direction and get it back on track, ensuring that the conversation is managed to achieve both the agreed purpose and desired outcome for the review. You must ensure that together you cover the staff member’s experience of the current situation, a possible look back and what the desired future may look like, as well as how the staff member gets there. The manager therefore has a responsibility to ensure that the staff performance and development review makes sense for both parties. It is about “clarifying the purpose of the dialogue and regularly checking in with the other person as to whether you are moving in roughly the same direction throughout the dialogue” (Lykke, 2018, p. 2)

The course of a dialogue can be illustrated with the Gamemaster model, which can be used as a method to control the process:

![Gamemaster model diagram]

Conversations often have a life of their own, and can move in inappropriate directions. If the manager finds that this is happening, they should pause the dialogue at the content level and focus attention on the process level. When you do this, you ‘go meta on the conversation(s)’ openly with the staff member about the content and the direction that the conversation has taken in relation to the desired direction. You can use some of these questions as meta-reflections on the process and content:

- Are we on the right track?
- Is what we agreed at the beginning still important?
- What have we achieved, and what do we need to achieve?
- Are we operating based on the same understanding?
- Is it appropriate to continue the conversation on this track, or should we switch? If so: to what, and how?

In the Gamemaster model, meta-conversations are called ‘time out’. These timeouts can be used to ensure that you and the staff member cover all four needs in the dialogue; are curious about a possible correlation between the number scores on the four needs; ensure that you talk about the past, the current situation and the future development opportunities.

Kilder:

