SFJ EFSM14
Manage the performance of teams and individuals to achieve objectives

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Overview

This standard is about making the best use of your team and its members so that they can achieve your organisation's objectives. It covers allocating work, agreeing objectives, and setting out plans and methods of working. It also involves monitoring and evaluating the work of your team and its members and providing feedback to them on their performance.

There are five elements

1 **Agree objectives and work plans with teams and individuals**
This involves setting out and agreeing objectives and work plans which are specific, measurable, realistic, time-bound and consistent with your organisation's overall objectives and policies. It includes explaining ways of working in sufficient detail for your team members to understand their objectives and responsibilities.

2 **Allocate and delegate work to teams and individuals**
This includes deciding with your team how to distribute tasks and responsibilities. It involves making sure this allocation makes best use of team members' abilities, and provides opportunities for them to learn and develop their roles.

3 **Assess the performance of teams and individuals**
This includes making it clear why you are monitoring and assessing their performance. It involves encouraging them to evaluate their own performance wherever possible. You need to evaluate their performance against clear, agreed criteria, taking into account organisational constraints and personal circumstances.

4 **Provide feedback to teams and individuals on their performance**
This involves giving regular feedback based on your objective assessment of their performance. It includes acknowledging their achievements and providing constructive suggestions and encouragement together with opportunities for them to respond to your feedback.

5 **Resolve performance issues with teams and individuals**
This involves investigating and managing incidents of poor performance or reduced performance. It includes your role in formal and informal review, disciplinary and grievance procedures.

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Performance criteria

Agree objectives and work plans with teams and individuals

You must be able to:

P1   give opportunities to your team members to help define their own objectives and work plans

P2   develop objectives and work plans which are consistent with team and organisational objectives and agree these with all personnel in your area of responsibility

P3   ensure the objectives, work plans and schedules are achievable within organisational constraints

P4   ensure the objectives and work plans take account of team members' abilities and development needs

P5   explain the objectives and work plans in sufficient detail and at a level and pace appropriate to your individual team members

P6   confirm team and individual understanding of, and commitment to, objectives and work plans at appropriate intervals

P7   provide advice and guidance on how to achieve objectives in sufficient detail and appropriate to the needs of teams and individuals

P8   update the objectives and work plans taking account of any individual, team and organisational changes

P9   take action to minimise the effect of actual and potential risks

Allocate and delegate work to teams and individuals

You must be able to:

P10   give opportunities to your team members to recommend how you should allocate work within the team

P11   ensure your allocation of work makes the best use of your team's resources and abilities

P12   ensure your allocation of work provides your team members with suitable learning opportunities to meet their personal development objectives

P13   ensure your allocation of work is consistent with your team's objectives, and the objectives, policies and values of your organisation

P14   define the responsibilities of your team and its individual members, and the limits of their authority

P15   provide sufficient information on your allocation of work at a level and pace appropriate to the individuals concerned

P16   confirm team and individual understanding of, and commitment to, work allocations at appropriate intervals

P17   reach agreement with relevant people on the prioritisation of objectives or reallocation of resources, where team resources are insufficient

P18   inform your team and its members of changes to work allocations in a way which minimises the impact on time, cost and inconvenience

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Assess the performance of teams and individuals

You must be able to:

P19 explain the purpose of monitoring and assessment to all those involved

P20 give opportunities to teams and individuals to monitor and assess their own performance against objectives and work plans

P21 monitor teams and individuals to maintain and improve performance

P22 assess the performance of teams and individuals based on sufficient, valid and reliable information

P23 assess objectively, against agreed criteria

P24 ensure that your assessments take due account of the personal circumstances of team members and the organisational constraints on their work

P25 take appropriate action to minimise the effect of actual and potential risks

P26 forward details of proposed change to the relevant line manager, where service delivery improvements are identified

Provide feedback to teams and individuals on their performance

You must be able to:

P27 provide feedback to teams and individuals which helps them to maintain and improve their performance

P28 provide feedback that is clear, and is based on your objective assessment of their performance against agreed objectives

P29 provide your team members with suggestions and encouragement for improving future performance against their work and development objectives

P30 give opportunities to teams and individuals to respond to feedback, and to recommend how they could improve their performance in the future

Resolve performance issues with teams and individuals

You must be able to:

P31 determine the existence of actual performance issues and the apparent causes

P32 investigate and confirm the actual causes of performance difficulties with individuals involved

P33 determine your role and responsibilities in relation to the cause of performance difficulties

P34 explore and agree options for resolving performance issues

P35 record agreements and outcomes in line with relevant informal or formal procedures

P36 follow up action and monitor performance within agreed timescale

P37 refer matters beyond your area of competence or level of responsibility to relevant people

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Knowledge and understanding

You need to know and understand:

K1   the importance of defining and communicating team and individual responsibilities and how to do this

K2   how to develop and present work plans using spoken, written and graphical means

K3   the purpose of monitoring and assessment and communicating this effectively to those involved

K4   how to provide both positive and negative feedback to team members on their performance

K5   how to choose an appropriate time, place and method to give feedback to teams and individuals

K6   the importance of the effective allocation of work to your team's performance and your role and responsibilities in relation to this

K7   the factors which you need to consider when allocating work to individuals within the team

K8   how to match the allocation of work to learning needs and individual development plans

K9   how to prioritise and re-prioritise work allocations according to resource availability

K10 how your changes to work allocations and negotiations around them can impact on cost, time and convenience

K11 the importance of consulting with team members on objectives and work plans

K12 how to encourage and enable team members to define their work objectives and plans

K13 how to gain the commitment of team members to objectives and work plans through effective leadership

K14 the types of issues on which your team members may need advice and guidance

K15 the importance of providing opportunities to team members to monitor and assess their work, and how to enable this

K16 how to motivate team members and gain their commitment by providing feedback and effective leadership

K17 the importance of providing constructive suggestions on how performance can be improved

K18 your team objectives, and the organisational policies and values which have a bearing on the allocation of work within your team

K19 the relevant people with whom negotiations on the allocation of resources need to take place

K20 the organisational objectives and constraints which have a bearing on objectives and work plans

K21 organisational procedures for discipline, grievance and management of poor performance

K22   how to identify and devise objectives and work plans for the short, medium and long term

K23   the importance of agreeing objectives and work plans which are realistic and achievable

K24   how to match objectives and work plans with individuals' abilities and development needs

K25   the importance of regularly updating objectives and work plans

K26   the importance of monitoring and assessing the ongoing performance of teams and individuals

K27   different purposes of work monitoring and assessment

K28   how to make fair and objective assessments on individual performance

K29   the standards against which work is to be assessed

K30   the information needed to assess the performance of teams and individuals

K31   the importance of providing clear and accurate feedback to your team members on their performance and your role and responsibilities in relation to this

K32   how the necessary information should be gathered and validated

K33   the principles of confidentiality when providing feedback and who should receive what information

K34   the types of personal circumstances which may impact on individual performance

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Additional Information

Glossary

Allocating work: Giving teams and individuals responsibility for tasks which should achieve agreed work objectives

Assessment of performance: A balanced analysis of performance against planned objectives, taking all relevant factors into account

Confidentiality: Only providing information to those who are authorised to have it

Feedback on performance: Information you give to team members on how well they are performing against the objectives which have been agreed

Monitoring: Keeping a close eye on activities and results, and comparing these with planned objectives; methods include considering spoken and written information provided by others

Objectives: Clearly defined results which your team and its members need to achieve; objectives should be specific, measurable, realistic and time-bound

Organisational constraints: Your organisation's policies, objectives and level of resources, which limit your freedom to take decisions and action

Organisational objectives: Clearly defined and measurable results which your organisation is scheduled to achieve

Plans: Documents or spoken agreements, which describe the work to be carried out, by when, by whom, to what standard and with what resources, in order that requirements and objectives can be met

Policies: Guidelines which cover the allocation of work, such as equal opportunities, training and development and performance management policies

Prioritisation: Deciding the relative importance and urgency of objectives and tasks, so that you know in which order to tackle them

Relevant people: Team members, colleagues working at the same level as the manager, higher-level managers and sponsors, personnel specialists, people outside the organisation, customers and suppliers

Resources: The people, time, equipment, materials, services, energy and premises which you have at your disposal

Schedules: Documents showing the work to be done, when and, sometimes, by whom

Values: The principles which your organisation believes in and seeks to realise in everything it does; values may be reflected in your organisation's mission, standards of work, relationships between individuals at work, relationships with suppliers, customers and other stakeholders, personnel management and reward systems, training, equal opportunities, health and safety and environmental policies

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