

## PROJECT SCAFFOLD - BEST PRACTICE FORM 1

## Organisation contributing the best practice

Organisation name:		MacCare NPC		Best Practice Ref. Nr.		5045-004-020	
Information provided by:		Heide Archer		Date:		11/05/2022 Adjusted 17/01/2023	
Contact email:		heidearcher@macadamiacare.com		Role within organisation:		Care Director	
Contact number:		0711755564		Contact number:		0711755564	
Stage of BP development:	Submitted	x	Sector Review	18/01/2023	Re-submitted	20/01/2023	Published 03/02/2023

## PART A: BEST PRACTICE to be completed by representative of organisation sharing a best practice

Practice (name):	Staff Performance Management (notes added)
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## 1. This proposed best practice is related to:

Customer Value Proposition		Finance / Costs		Business Process		Staff	X	Systems	
Organisational Structure		Quality		Service Delivery		Health & Safety		Morale	X
Other: please indicate									

## 2. Context: Share information to give more context in relation to where this specific practice is used in your organisation.

Urban	X	Rural		ECONOMIC LEVEL:		Social Grant Recipients		Care Centre	
Care centre		Independent Living		Assisted Living		Nr. of Inhouse staff	130	Nr. of Outsourced staff	
Nr. of rooms	90	Nr. of beds	90						

## 3. Description of best practice:

3.1 Share as much details as possible. Where appropriate indicate resident participation, involvement, benefit etc.	
Staff performance is monitored continuously with monthly and quarterly assessments, quarterly assessments are plotted on a 9Grid every 3months, and then together with qualification and length of service translate to a point system that results in an incentive payout. 3 parts: performance assessment, 9 Grid, point system and incentive calculation ( documents attached)	
3.2 Why did you develop this best practice? Please describe the challenges, constraints or bottlenecks that led to this.	
Being a NPC there is at times limited funding to pay out standard bonuses, and everyone is rewarded the same no matter your contribution to the success or downfall of your organization and your peers and residents, where this system is reflective and inspiring to all contributions or lack thereof. Length of service is also rewarded and qualifications. And as the company grows, the payout may even exceed a 13 cheque.	
3.3 Why do you consider this to be a best practice? E.g., Outcomes noted	
it is very fair and much less sensitive to subjectiveness and manipulation than simple performance reviews and bonuses. Also it gives the performance reviews something to work towards. The staff can improve their points by improving their standard of care. On the 9 grid you can monitor the staff member improving or losing interest or not coping.	
3.4 Do you consider this to be compliant with the current Older Persons Act?	
Yes	yes
No	
If Yes, which portions does it comply with?	If No, which portions does it not comply with?
Labour Law and Labour Equity	
I do not know	
3.5 How long has this practice been used within the organisation? (state period in years)	5 years
3.6 What are essential aspects in the organisation that directly support / maintain this practice?	

Thank you for your contribution to improve the lives of older individuals and those supporting them.

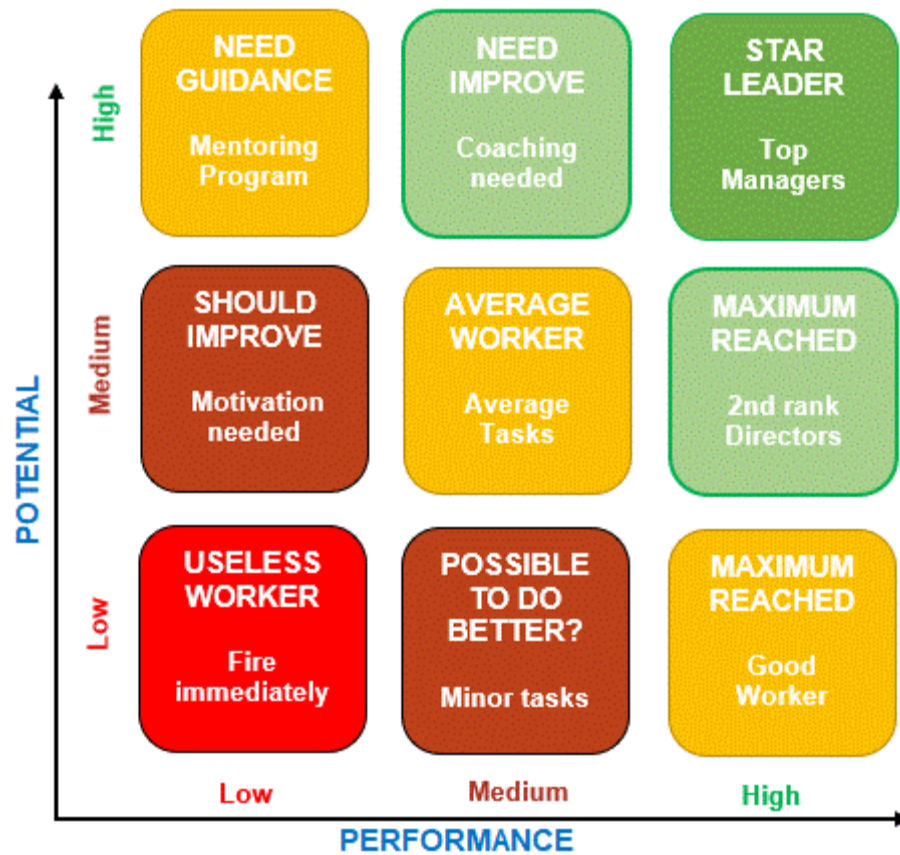
Send completed form to projectscaffold2021@gmail.com

Regular processes, systems set up for interpretation and payout
3.7 What are the benefits for your residents and/or staff and other stakeholders?
Motivated and fair practices for your staff. Also motivates them to respect and take responsibility of wastage of their environment, as a broken kettle, lights that are not switched off and heaters that run day and night reflect in their payout. Accountability and empowering the staff.
3.8 What lessons were learned?
In the harder times it is sometimes difficult to inspire the staff when the payout is equivalent to maybe a Wimpy coffee and the staff member has put her heart and soul into her residents. When the organization is doing well, it is easier to see the rewards directly in their payouts.  Where I would like to improve: is the performance assessment, we have <a href="#">started a new appraisal system: Self, Peer and Senior appraisal, which reflects directly into 9 Grid point system.</a> Where I would also like to include rewarding self improvement and tests passed, <a href="#">additional skill acquired. Staff training commenced: Carer Training, Nursing Guidelines, Policies and Be-In-Spirit Journals</a>

**SECTOR CONTRIBUTION** – *to be completed once the best practice has been presented at a monthly meeting for sector review and contribution.*

Date presented:	18 January 2023	
Question or Comment or suggestion	Response / change to best practice if applicable	
1. Are residents, families and volunteers also part of the included in the point system (appraisals)? 2. To explore the value of 'time banking'	No not yet, but it is an important aspect which will be added.	
Contributor:	Syd Eckley	
3. Comment: this helps staff to become aware of waste and their incentives, as the organisations performance is linked to their incentive, staff become very focused on wastage. Helps staff to understand doing things differently to reduce waste and wasteful practices		
Contributor:	Rob Jones	
4. How difficult was it to move from a 13 <sup>th</sup> cheque to this incentive system and how did you manage it with staff?	<ul style="list-style-type: none"> <li>Clearly stated in new letters of appointment (renegotiated when new employer started)</li> <li>Clearly explaining the new system</li> <li>Was not easy, but worth it.</li> </ul>	
Contributor:	Christa Marais – Kidbrooke Place	
5.		
Contributor:		
6.		
Contributor:		

<b>LATENTS — Problem Children</b> <b>Poor performance, High Potential</b> <div> <div>3</div> <div>3</div> </div>	<b>EMERGERS — Future Star Prodigy</b> <div> <div>8</div> <div>3</div> </div>	<b>STARS</b> <div> <div>9</div> <div>4</div> </div>
<b>PLACEHOLDERS — Up/Out Dilemmas</b> <div> <div>2</div> <div>2</div> </div>	<b>TRANSITIONALS — Future</b> <div> <div>6</div> <div>2</div> </div>	<b>CONTRIBUTORS — Future Star Pro</b> <div> <div>7</div> <div>3</div> </div>
<b>DETRACTORS - Iceberg</b> <div> <div>1</div> <div>1</div> </div>	<b>BLOCKERS — Up/Out Grounders</b> <div> <div>4</div> <div>2</div> </div>	<b>WORKERS — Enigma Backbones</b> <div> <div>5</div> <div>3</div> </div>



# **CARE CENTRE TEAM MEMBER PERFORMANCE AND POTENTIAL 9-GRID ANALYSIS**

Nov 21



# Nelspruit HMA

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## CONFIDENTIAL

### Comments:

**xxx** is a Staatmaker. I know the residents are in good hands. She is prone to exasperation and sometimes makes a mountain out of a moleheap. Xxx supports and trains her staff well, and takes responsibility of them, even when they gripe and groan. She is experienced, has initiative and creative. She keeps her house neat and in order.

**xxx has shown up as a great team leader and I shall see if she can take on more responsibility.**

**aaa** is just a pleasure. She puts in double the work if required and I know the residents are well taken care of. She has initiative, a sense of responsibility and she cares. She can be emotional at times, and needs to know she is supported. **She is working very hard to cope with her new responsibilities and keen to learn.**

**zzz** takes a challenge on without hesitation, diligently and with vigilance. She understands the importance and I do not need to repeat myself. But she can also speak out of turn and cause problems. She tends to work on her own and needs to mind herself when dealing with difficult or disgruntled residents as she stands her ground instead of negotiating or investigating further. **zzz is frustrating, she wants to be more instead of doing more. She is very capable, but will use that to delegate work to day staff instead of putting in more work and so lightning the load. She also does not always know when to approach a family, she will phone the son at 24h00 to tell him his dad fell and is fine.**

**bbb** Night duty at the moment not coping with additional work and not showing initiative. Does what she has to. Often tired in meetings and nods off, health issue? Lack of rest? She cares for her residents. When I worked shift she took responsibility and showed initiative. **bbb does not get the point of rounds, she sits in the morning and fills the times in and signs instead of doing it at the time of the rounds.**

**mmm** doing better since the first incident.... Keeps our message board updated every day- initiative, she surprises me sometimes with her caring attitude. **She absolutely enjoyed the gratitude challenge.**

**Nnn** steady worker, ready smile and shows initiative and enjoys activities. **She has fitted in well in a trying homecare situation. I am proud of her.**

**ooo** can go the extra mile, ready smile, I wonder what she may be capable of under good leadership.

**sss** works well enough, participates in meetings, can be loud at times, shows initiative and compassion **sss did not cope with the homecare at all and is coming back to the CC**

**vvv** always a little wary of new things, though she enjoys her work, gentle and sometimes a little timid...responds well to guidance, skill and knowledge needs revision.

**eee** quietly gets on with her daily tasks, has embraced the HC and is keen. She shows understanding and initiative. **eee is keen to try the home care. So I shall see how she copes.**

**iii** is ambitious and intelligent. Always a little discontent, listens to reasoning, can stir and needs to be monitored. She has become complacent and needs guidance in the homecare environment.

**\*\*\*** Knowledgeable of her work and will come with suggestions. Very comfortable in her role, wary of challenges, likes her house to be in order, willing to change shifts. **\*\*\*** has been amazing these past few months, she is a hardworker and steady and has great insight in very difficult situations. **A blessing.**

**ppp** will go the extra mile and is willing to learn and enjoys a challenge. Problems at home shadowing her potential.

**www** enjoys her residents and her work, she is gentle and neat, and has potential. And works hard. **Not up for challenges, like her routine. Steady and quite worker.**

**yyy** has a quick smile and works conscientiously. She can become flustered and out of sorts. **ddd always up for a challenge though she can get into trouble for becoming too involved. Back in the CC for a while, sorting the activities.**

**hhh** new ENA on staff and always pleasant with a big smile.

We have many good team members and some potential.

HMA CM

# 9-Box Performance Grid

## What is the 9-Box Performance Grid?

The **9-Box Performance Grid** is a tool that helps companies evaluate their employees and which Position and Career path best suits them.

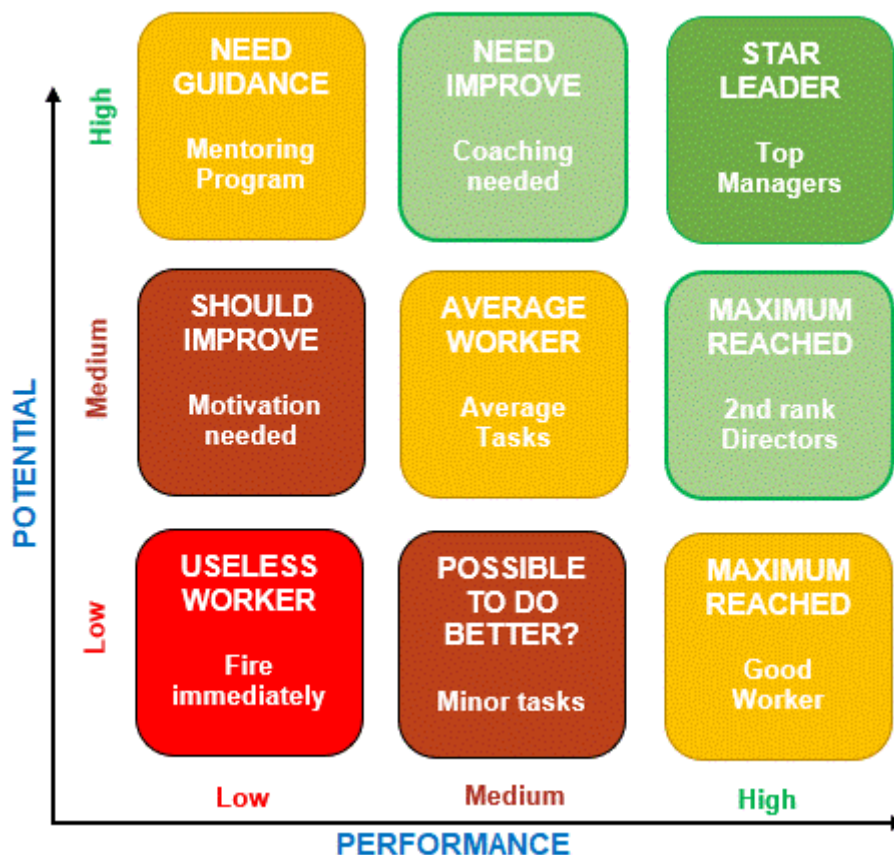
It is based on **2 variables**:

- **Potential.**
  - How valuable an employee can become.
- **Performance.**
  - How much an employee works and with what quality.

These 2 **variables** are both **quantified into three categories**:

- **High.**
- **Medium.**
- **Low.**

The result is a 3 x 3 Matrix with **9 possible Profiles**:



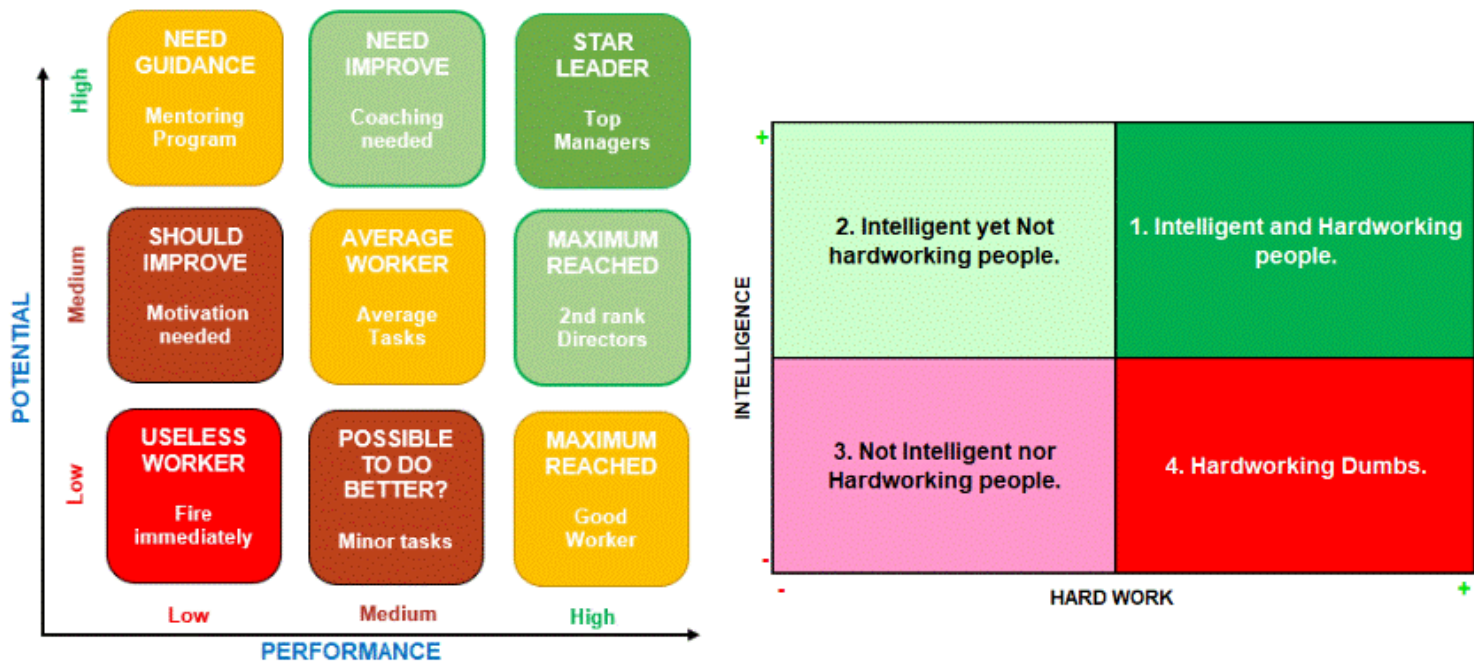
*Classic 9-Box Performance Grid representation.*

If you think about it, it is a Future/ Present comparison:



- Where someone could get vs Where he is right now.

### Difference between the 9-Box performance Grid and the Manstein matrix



Maybe you already know **Manstein's** matrix (we talked about a similar matrix in our "[Teamwork Skills and Profiles](#)" page).

It describes employees according to:

- How hard they work.
- How intelligent they are.

This **9-Box Performance Grid** is very similar.

- Intelligence is similar to Potential.
- Hard work is similar to Performance.

However, we think **Manstein's matrix** can be contained in the 9-Box Performance grid but not vice versa.

Why?

#### 1. Hard work is a Variable within Performance.

- Only Hard work is not enough to describe Performance.
  - Talented people don't need as much work as Average workers.

## 2. Intelligence is a Variable within Potential (maybe the most important).

- But if some intelligent employee is not focused, not willing to work hard... His potential could even be zero, no matter how intelligent he is.

Therefore, the 9-Box Performance grid provides more accurate information than Manstein's.

- Probably, Manstein's matrix was before, and the 9-Box grid was based on it.

But that wouldn't change anything.

This matrix seems easy to build.

But... **How can you evaluate someone's Potential? or his Performance?**

### How to assess Potential

Evaluating someone's Potential is **very difficult**.

- There is no magic test that reflects people's Potential.

Also, someone can be very good at something but terrible at other things.

However, we'll give you **5 Tips** that **we have used successfully in different companies**:

- **Make a list of the desired Skills for each Job position.**
  - A Commercial doesn't require the same skills than a PHP programmer.
- **List how many of those Skills each employee meets.**
  - You can use a Professional Development Matrix
- **Use academic Background and personal achievements as indicators.**
  - The higher the better.
- **Use periodic evaluations, developed by different bosses.**
  - The more feedback, the better.
- **Interview your employees and evaluate:**
  - **Motivation.**
  - **Self-realization.**
  - **Focus.**
  - **Intelligence** (this is difficult).

### How to assess Performance

Assessing someone's Performance at work is much easier.

It depends on multiple factors, of course, but, **if your company is well "goal-oriented"**, you'll only have to analyze **if the employee is meeting his objectives or not**.

**What happens if a company is not properly goal-oriented?**

- Then, **it is very difficult** to assess how someone is performing.

We have met many Managers who complained about their employees, but the real problem was that the company was a total disaster.

- No one knew what they had to do, when, how or why.

**When evaluating someone's performance, don't forget these 3 factors :**

- **1. Know.**
  - **Does he know what he has to do?**
    - His goals.
    - The expected quality .
    - Deadlines.
    - etc...
- **2. Can.**
  - **Is he physically able to do it?**
    - Does he have the resources necessary to do what he has to do?
      - A Computer.
      - A proper Tool
      - etc...
  - **Has he received enough training and knowledge about what he has to do?**
    - And how to do it properly.
- **3. Want.**
  - **Does he want to do what he has to do?**
    - If he knows what to do...
    - If he can do it...
    - ...But if he doesn't do it, it is because he doesn't want to do it.

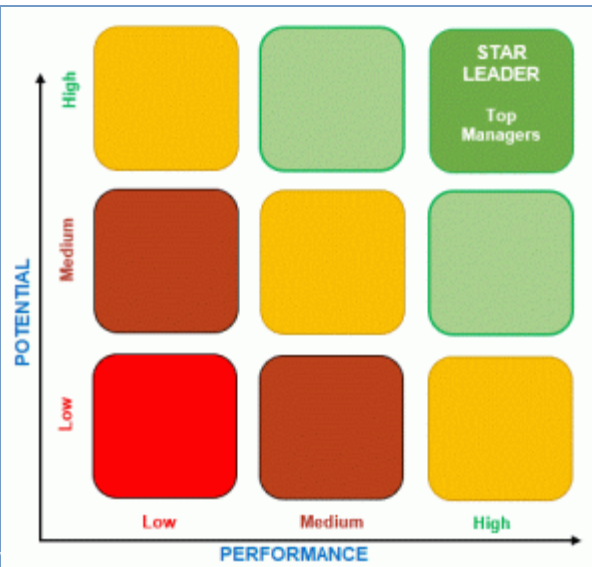
Once you know how to evaluate Potential and Performance, it is time to see **the resulting profiles:**

## 9-Box Profiles

The 9-Box Performance Grid offers 3 “obvious” and 6 more complex Profiles .

Let's look first at the “obvious” Profiles:

## Star Leader

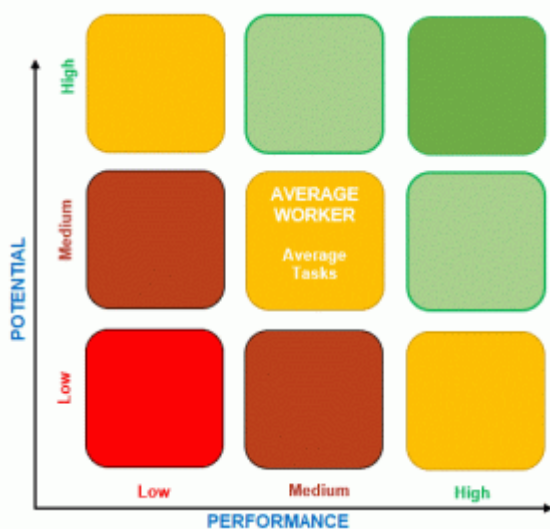


If an employee:

- Has proven to make successful decisions constantly.
- Has above-average Skills.
- Has received always wonderful feedback.
- Is motivated and takes responsibility.
- etc...

If someone meets these characteristics (and is also a good Team worker) he (or she) should **be in a Top Management position**.

## Average Worker

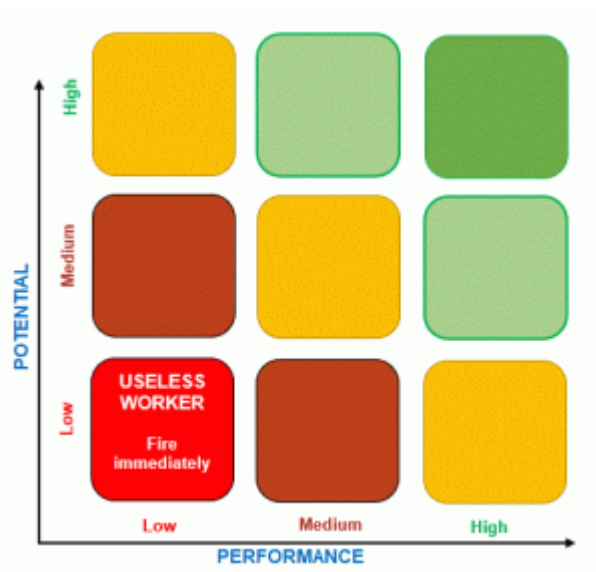


If an employee:

- Has on-average skills.
- Is motivated just by his salary (not by the challenge or by more responsibility).
- Receives mediocre feedback everywhere.
- Does his work, but doesn't try to improve it in any way.
- etc...

If someone meet these characteristics, he (or she) **should never hold managerial or decision-making positions**.

## Fire Immediately



If an employee:

- Has below average Skills.
- Is not interested about his job.
- Receives bad feedback from everybody.
- Doesn't try to improve.
- Always believes that the fault lies with others.
- etc...

He (or she) **should be fired as soon as possible**.

Now, let's talk about those more complex intermediate Profiles:

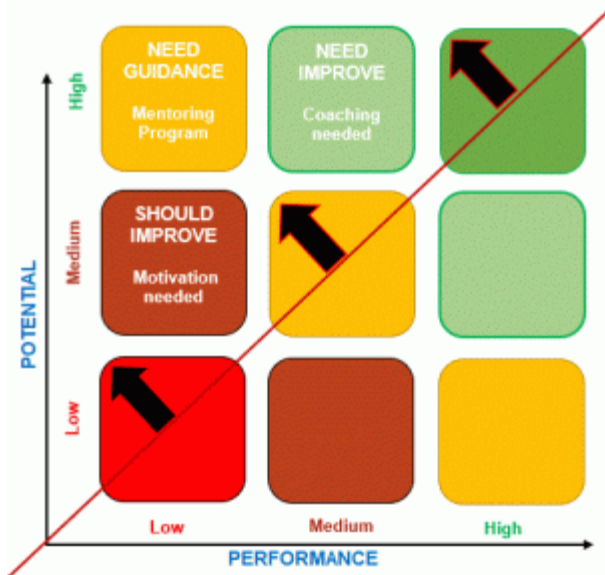
## What about the Intermediate Profiles?

These 6 intermediate Profiles **can be divided into 2 categories**:

- Employees with **better Performance than Potential**.
- Employees with **more Potential than Performance**.

Let's look at each of these situations:

### More Potential than Performance:



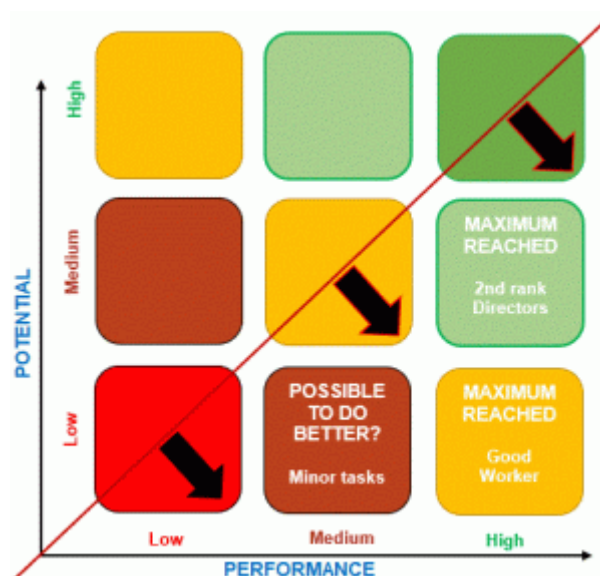
As you can see in the picture above, **these 3 profiles should receive some kind of orientation:**

- **Mentoring** programs.
- **Coaching**.
- **Interviews** to discover their motivations.

This poor performance may be due to very different reasons.

A good way to increase the performance of this type of employees is to **assign them the Tasks that best suit them**.

### More Performance than Potential:



We won't lie to you: **this is unusual**.

However, if you find some employee with this Profile, **you should take care of him**.

The company can't do much more to improve their results: **the goal is to maintain this high performance.**

- Moreover, **they can be a good example** for other employees.

As you can see in the image above, with **Medium** Potential and **High** Performance, these employees **can become 2nd-rank managers.**

All these assumptions don't contemplate one little but important factor: **How ambitious is the employee.**

## When Ambition and Potential don't match

When someone's Potential differs from his level of Ambition is when there may be misunderstandings.

Why don't we talk about Performance?

- Because **Performance can be measured "objectively"**.

**It is easy not to promote someone if he didn't achieved his goals.** It is easy to explain.

But **how do you tell someone that he won't be promoted because he is not smart enough?**

- What happens if he is not aware of his limitations?

You can have 2 situations:

- When someone has **more Potential than Ambition.**
- When someone has **more Ambition than Potential.**

### **More Potential than Ambition**

This situation is not unusual.

Companies should try to Motivate this type of employees.

**Sometimes people are not motivated because they have not discovered what motivates them.**

**Other times, people with high Potential are simply not Ambitious at all.**

- In this situation, companies shouldn't try to push them too much.
  - Just assume how these employees are.

## More Ambition than Potential

This is a much more common situation.

The World is full of mediocre people with excessive ambition.

And many people are not willing to admit their limitations (we all have).

What to do with these Profiles?

Exactly what we mentioned before: **Set Objectives and Goals.**

- Be as goal-oriented as possible.

No matter how ambitious someone is: **if he sees that he is not meeting his goals when other coworkers can do it, sooner or later he'll realize his limitations.**

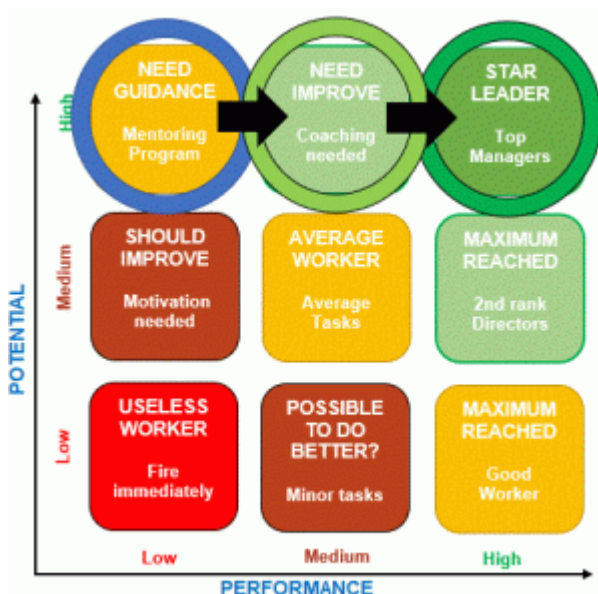
Let's see some examples:

## 9-Box Performance Grid examples

No, we'll give you 3 practical examples about different situations and how we would handle them.

- These situations are based on real situations that we experienced in the past.

### High Potential and Low Performance - 9-Box Example



You have an employee with:

- **High Potential.**
- **Low Performance.**



He is a very smart person, with impressive Skills.

However, he is not performing very well.

- What do you do?

### First: A Mentoring program.

The First thing you do is **assign him a Mentor**.

After some weeks you find out one thing:

- **He hates his current Job position.**
  - He needs more challenging Tasks.

### Second: You assign him a different Job position, recommended by his Mentor.

In this new position, he is Performing much better, but still at a **Medium** level.

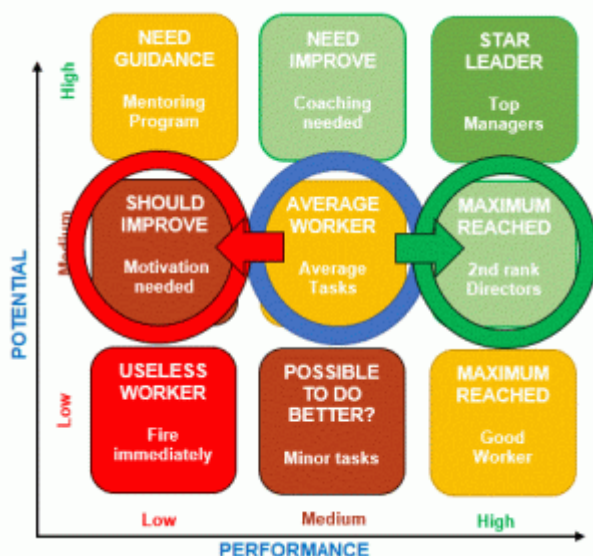
- He is doing everything very well, but you realize **he lacks decision-making Skills**.
  - This is preventing him from developing his full potential.

### Third: You assign him a Coaching Program.

As soon as he improves his decision-making Skills, **his Performance increases drastically**.

- In few years, he'll be ready to become a Manager.

## Average Worker with High Ambition - 9-Box example



Now, you have an employee with:

- **Average** Potential.
- **Average** Performance.

...But **with a very high Ambition**.

Many of his friends in the company have been promoted and **he is convinced that he should be promoted too**.

**These type of employees can increase their Performance, but also decrease it if they feel “underestimated” or “ignored”.**

Moreover, **they can become “Toxic” employees**.

- What do you do?

**First: You make sure all his tasks are perfectly defined.**

It is very common not to have everything perfectly defined.

- Companies need flexibility and, things change over time.

But **with these type of employees, you have to make an extra effort**.

**Second: You let him know what a promotion requires.**

You don't need to tell him directly, but **in a softer or indirect way**.

You tell his boss to mention him what others did in the past for get promoted.

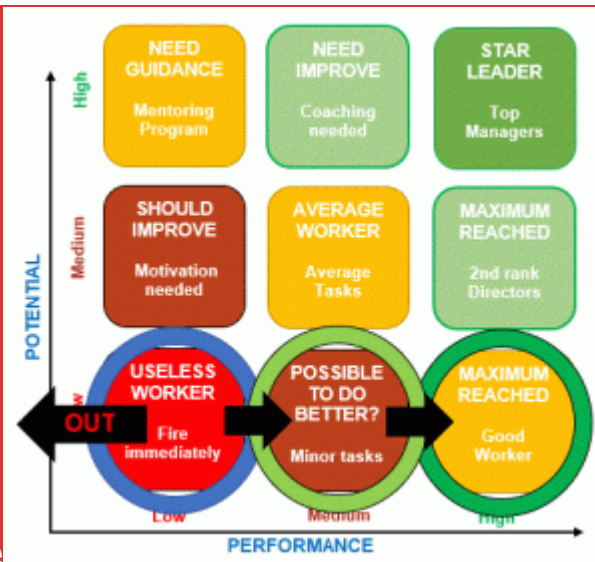
- For example:
  - Travelling a lot.
  - Selling a 20% more than average.
  - Increase margins for the company.

**How this ends:**

**The perfect result is** this employee thinking:

- **“I am smart enough to get a promotion but it is not worth it. It's too much work”.**

## Useless Worker - 9-Box example



Now, you have an employee with:

- **Low** Potential.
- **Low** Performance.

We recommended to fire these employees as soon as possible, but we know that this is not always as easy as it seems.

But, **if you want to fire somebody, recording everything he is doing wrong, helps.**

- If he is not meeting his goals.
- If he is late.
- If he doesn't care about his Job.
- etc.

Then, what do you do in this situation?

**First: Offer some guidance to this employee.**

**You should always offer** these employees a “last chance”.

- Maybe he had a terrible boss in the past.
- Maybe something is preventing him from doing his job better.

**You assign this employee a Mentor** in order **to find out if you can expect some improvement.**

**Second: Is there any solution?**

**If this Mentor gives you “good news” then you should try to improve his Performance.**

- Maybe assigning him other tasks.
- Maybe with some Coaching.
- etc.

But, if this Mentor says “there is no solution”, then:

**Third: Record every goal and Objective he is not achieving.**

Generate a good and objective record for weeks or months.

Don't tell him anything.

**Never threaten these employees.**

- **That is absolutely useless. Always.**

**Fourth: No solution? Fire him.**

With all these records, it will be much easier to justify a dismissal.

## Summarizing

The 9-Box Performance Grid is a tool that helps companies evaluate their employees and which Position and Career path best suits them.

It offers **5 possible** main **Profiles**:

- **A Star Leader.**
  - Should be in Top Management positions.
- **An Average employee.**
  - Should hold average tasks and Job positions.
- **A Terrible employee.**
  - Should receive a “last chance” for improvement.
    - If they don't improve their Performance, they should be fired.
- **More Potential than Performance** employees.
  - Need guidance for finding their Motivations.
- **More Performance than Potential** employees.
  - Companies should try to maintain their good Performance.

It is not always easy to guess what is best for an employee, but you should always remember:

- **It is much easier if the company is goal-oriented.**
  - Everyone knows what to do and what is expected of them.
- **Talking with employees is always a good option.**
  - You can use a Mentor, a Coach, etc...
- **Threats are useless.**
  - If you have to fire somebody, do it. But don't expect better results with a threat