



ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

Performance Reviews at Arts Organizations

JUNE 2023

Report Outline

Part I: Performance Reviews for Arts Organizations

- Annual manager check-ins: benefits and process
- Setting effective goals for managers

Part II: Relevant Research & Resources

- The individual development plan
- Avoiding bias in performance reviews

The Reality of Performance Reviews

- Arts nonprofits do not grow at a rate to allow all staff to build careers through promotions.
- There are **few tools to motivate high performers** other than new work opportunities (only sometimes accompanied by higher pay) and personal feedback and development through coaching from their manager or others in the organization.
- In addition, there is **no pay-for-performance system** at most arts nonprofits.



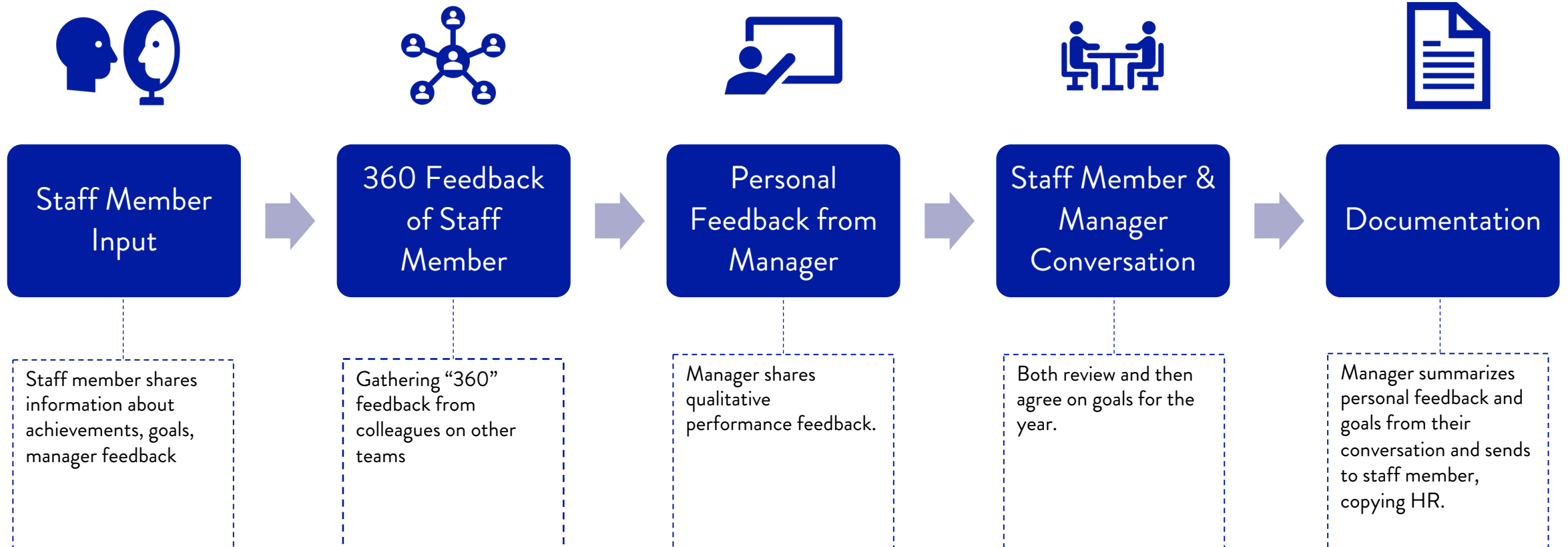
This reality could lead to **several dangers** when designing a performance management process:

- Many of the evaluative elements of performance reviews could feel punitive, without offering clear benefits.
- Individuals overachieving against goals will often receive little more than praise, which could lead to frustration.
- The resulting system becomes one-sided, using goals to punish individuals for underperformance without benefits for over-performance.

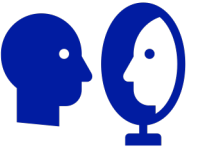


A personal discussion of strengths and development areas, intended primarily to **motivate and coach** is an effective structure to provide engagement through feedback without tying to promotions or compensation.

Annual Manager Check-In Process



Staff Member Evaluation



A self-reflection is a useful exercise for staff members to feel full ownership over their own growth as part of an annual check-in process.

1. Does your job description accurately reflect your daily responsibilities?
2. What accomplishments are you most proud of from the past year?
3. What do you feel like you should start, stop, or continue doing in your current role?
4. What are your goals for the upcoming year? Are there any career aspirations you hold that we should know about to help get you there?

Manager Feedback

An annual check-in can be a great opportunity to give team members the chance to provide their own feedback of their managers and the organization as a whole, ensuring that the conversation does not feel one-sided.

Questions may include:

- What should your manager start, continue, and/or stop doing in order to be a better manager?
- What do you need from your manager to be successful over the next year?
- What are we not addressing or dealing with as a department that we should be?

Manager Feedback & Check-In Conversation



In advance of the annual check-in conversation, the manager prepares the following information about their direct report:

- Whether or not the staff member is performing according to expectations
- Overall feedback (including summary of 360 feedback, if applicable):
 - Areas where the staff member excelled
 - Areas where the staff member could improve or focus next to build their career

In the annual check-in conversation, the staff member and manager discuss both the staff member input and feedback from the manager, then come to an agreement on the following:

1. Personal and work goals for the coming year: building against development areas, new skill development, or otherwise.
2. How the manager will support against those goals: providing ongoing feedback, removing obstacles, providing opportunities

The manager should summarize the two agreements above in writing and share them back with the staff member, cc'ing HR.

Considerations for Goal-Setting

While we suggest keeping goal assessment separate from personal feedback given in performance reviews without pay-for-performance systems, institution-wide goals are still important to establish for department leaders. Below are three steps to deploying goal-setting at your organization.

1 Establish institution-wide goals

- SMART goals are typically gold-standard; at a minimum they should be specific, important and measurable
- Constrain goals to senior team and direct reports to start – they are best for those who have direct control over the outcomes

2 Create goal accountability mechanisms

- Goals should be revisited and evaluated at least quarterly to remain effective
- Accountability mechanisms can be simple. Examples include:
 - A dashboard shared before/during leadership meetings
 - Dedicated meetings for goal check-ins, held quarterly
 - After Action Review sessions after key productions, including a goal review

3 Cascade goals

- Once leadership is comfortable with a cycle of goal setting and review, begin an annual cascade to the next level of staff
- Once organizational goals have been set, encourage departments to effectively ‘distribute’ the achievement of those goals across team members
- Hold an accountability session reviewing all organizational goals to ensure the individual goals combined will allow the organization to achieve the desired outcomes

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The Plan Starts the Coaching Process

Individual Development Plan		
Name: <i>Susie</i>	Manager: <i>Karen</i>	Date Last Updated: <i>Oct 7</i>
Short-Term Career Goal: <i>Full confidence in current role</i>		
Long-Term Career Goal: <i>Larger role in production team</i>		

Objective	Action Steps	Manager Support	Measures of Success	Target Due Date
<i>Improve pushback when people ask for leader time</i>	<ul style="list-style-type: none"> <i>Improve language/techniques</i> <i>Personalize approach to different stakeholders</i> <i>Work on voice and email tone to convey authority</i> 	<ul style="list-style-type: none"> <i>Review emails on regular basis for this</i> <i>Observe interactions and provide feedback</i> <i>Connect Susie to Joan who has good techniques here</i> 	<i>Fewer cases of issues being escalated to me</i>	<i>By end of November</i>
	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • • 		
	<ul style="list-style-type: none"> • • • 	<ul style="list-style-type: none"> • • • 		

The Plan Starts the Coaching Process - TEMPLATE

Individual Development Plan		
Name:	Manager:	Date Last Updated:
Short-Term Career Goal:		
Long-Term Career Goal:		

Objective	Action Steps	Manager Support	Measures of Success	Target Due Date
	• • •	• • •		
	• • •	• • •		
	• • •	• • •		

Note: the staff member should fill out all sections except “Manager Support” and “Measures of Success” – those sections are to be completed alongside the manager during the coaching session in which this document is reviewed and discussed.

Observation and Debrief Template

Observation and Debrief Template

Name: _____ Date: _____
Nature of Interaction: _____

Debrief: [TOPIC]

Strengths (Continue To Do)

- 1.
- 2.
- 3.

Areas for Focus

- 1.
- 2.

Manager Support Next Steps:

Coachee/Team Member Next Steps:

Performance-Review Bias Concerns

Harvard
Business
Review

Employee Performance Management

How One Company Worked to Root Out Bias from Performance Reviews

by Joan C. Williams, Denise Lewin Loyd, Mikayla Boginsky, and Frances Armas-Edwards

April 21, 2021

We started by conducting an audit of the firm's performance evaluations. The vast majority seemed useful and appropriate. But when we looked closer at the data, we found sobering differences by both race and gender. Most dramatic was that only 9.5% of people of color received mentions of leadership in their performance evaluations — more than 70 percentage points lower than white women... Overall, we found four consistent stereotypes:

1. Prove It Again

Groups stereotyped as less competent — including women, people of color, individuals with disabilities, older employees, LGBT+, and professionals from blue-collar backgrounds — have to prove themselves over and over again. The way this plays out in performance evaluations is that “prove-it-again” groups tend to be judged on their performance — their mistakes are noticed more and remembered longer — while the majority white men are judged on their potential.

2. The Tightrope

...The clearest evidence of tightrope bias in our audit concerned comments about personality. We found that people of color and white women were far more likely to have their personality mentioned in their evaluations (including negative personality traits). What's optional for white men (getting along with others), seemed to be necessary for white women and people of color. Case in point: 83% of Black men were praised for having a “good attitude” vs. 46% of white men, and 27% of white women were praised for being “friendly and warm” vs. 10% of white men.

Personality wasn't the only type of tightrope bias we found: 50% of Black women's evaluations included mentions of doing the “office housework” (aka the undervalued, behind-the-scenes work) compared to 16% of white women and 3% of white men. Prescriptive stereotypes create pressure for women to be modest, helpful, and nice. (Think the “office mom.”)

3. The Maternal Wall

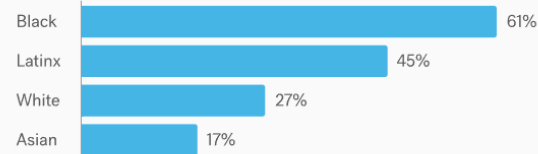
This reflects assumptions that mothers are no longer committed to their work, that they probably shouldn't be, and that they are less competent. (Think “pregnancy brain.”). One of our most shocking findings was that almost 20% of white women received comments on their performance evaluations to the effect that they did not want to make partner. Women were also more likely to receive comments about being overworked than men.

4. Racial Stereotypes

Racial stereotypes pertaining to performance evaluations can be overt, such as the stereotype that Asian Americans are good at technical tasks but lack leadership ability, or more subtle, such as the assumption that people of color need to be more willing to sacrifice work-life balance than white men. In our audit, we found that one third (33%) of people of color received comments that they were willing to travel, as compared to 13% of white men.

Other Biased Language

Textio has found strong patterns of inequity in job performance feedback. Employees who receive high-quality performance feedback grow faster, earn more, and get promoted faster than those who don't. And the groups of people who systemically receive the lowest-quality feedback are the same groups that are consistently underrepresented in corporate leadership.



Described as "passionate" in performance feedback

11x

Women are 11 times more likely than men to report being described as "abrasive" in the performance feedback they receive

4x

Black women are 4 times more likely than white men to see the term "overachiever" in their job performance feedback

7x

Job feedback for Asian men is 7 times more likely to have the words "brilliant" or "genius" in it than feedback for Latinx women

- Those receiving the least actionable (or constructive) feedback tend to be least represented in business overall and in leadership in particular. For every piece of inactionable feedback received by white men under 40, women over 40 receive 4.4; Black women (across age groups) receive 8.8.
- Women get 22% more written personality feedback than men, including positive and negative feedback. Asian workers receive less personality feedback than any other racial group. Black men get the least written feedback; younger workers receive more feedback than those over 30.
- Women are twice as likely to report being described as collaborative and nice, seven times more likely to report being described as opinionated, and 11 times more likely to report being described as abrasive. White people report being described as ambitious 4.9 times more often than Black people, and 7.1 times more than Asian people.
- People under 40 report being called ambitious 2.5 times more often than their older coworkers. Women, Black and Latinx people, and those over 30 tend to receive the most exaggerated feedback.

Additional Reading on Bias for BIPOC Individuals

[The Bias of Professionalism Standards](#): SSIR article covering how “professional standards” – including dress, language and attitudes toward work styles – center White-ness.

[Avoiding BIPOC Burnout and Overburdening](#): Article on “cultural taxation” covering the ways in which BIPOC individuals need to expend effort to conform to White-centered spaces and support DEI efforts.

