

Performance management when mental illness is present

Managing the performance of employees with mental illness can be challenging, but there are a number of principles and tools that can help.

You are entitled to apply your standard performance management system to all workers where you have a legitimate concern about their performance, whether they're navigating health challenges or not. That said, there are circumstances where alternative approaches are more appropriate.

This guide is designed to help you craft a suitable approach for managing team members where mental illness may be present.

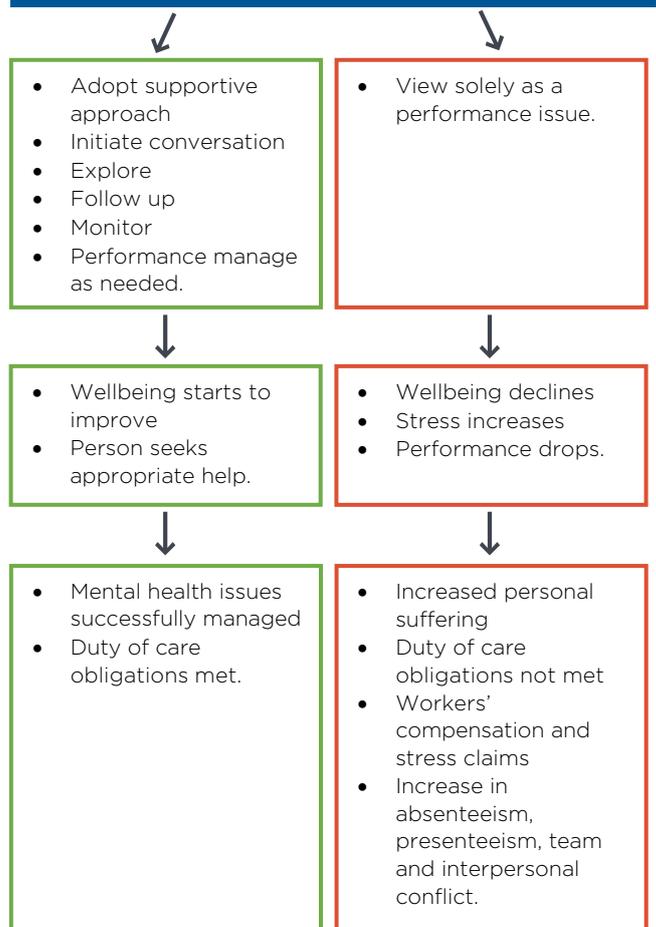
Identify the issue

- Following standard good practice (i.e. identify the issue, assess and analyse the problem, meet with the employee to discuss the problem, jointly devise a solution, monitor performance), with additional consideration of needs for reasonable adjustment to work is all that's expected
- Clear expectations, provision of support, and regular informal feedback on performance, help to create good relationships and a healthy performance management culture
- Encourage and enable the worker to discuss the performance concern and whether there are any health issues that may have impacted on their performance.

What to consider

- Personal circumstances that may contribute to the issue
- If a mental illness may be contributing to the poor performance
- The seriousness of the performance concern (as for more serious matters, such as violence, there may be no option but to take strong disciplinary action regardless of whether there is a reason, such as a mental illness)
- Whether the performance concern relates to a key part of the job or if reasonable adjustments could address or avoid recurrence.

Observe concerning behaviours or performance



Four approaches to successfully manage performance

1. Severe symptoms: highly dysfunctional, substance affected, potentially violent, risk to self or others, delusional or psychotic, cognitive impairment

- Cease performance management
- Determine risk to themselves or others
- Get professional advice (e.g. GP, Psychologist, EAP, HR)
- Engage the employee in both external and internal supports (e.g. GP, Psychologist, EAP, HR).

Observed symptoms but mental illness not disclosed

- Performance manage with caution focusing on providing a supportive space to discuss their personal issues and how it relates to work performance
- Address observed behaviour with employee
- Reinforce ramifications of continued poor performance and offer external and internal support
- Offer support
- Consider reasonable adjustments.

2. Moderate symptoms: depressed (but well treated), anxious, agitated, limited concentration or motivation, withdrawn

- Performance manage with caution, focus on supporting
- Determine if mental illness has contributed to the poor performance
- Consider reasonable adjustments to role
- Monitor and support performance based on professional recommendations.

Observed symptoms, employee denies that there are issues, or they have a mental illness

- Performance manage as normal, identifying observed behaviour and impact on their performance, team and organisation
- Reinforce ramifications of continued poor performance
- Ask for an explanation for the poor performance
- Set clear goals and deadlines for improved performance.

Tips for balancing wellbeing and performance

- Be accessible, considerate and understanding
- Be informative and encouraging
- Create a learning environment
- Be clear and set expectations
- Help people develop abilities and careers
- Hold people accountable in a fair and consistent way.

When to undertake disciplinary action or termination

- The performance issue is not a result of mental illness
- There is an inability to perform the key requirements of the job
- The performance issue continues after reasonable adjustments are made.

REFERENCES

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