



# NAREIM Case Study: Performance Management at Carmel Partners



# Agenda

- 1 About Us
- 2 Performance Review Cycle & Ratings
- 3 Review Form Questions & Competencies
- 4 New Performance Management Platform & Roll Out
- 5 Continuous Improvement: What's Next
- 6 Breakout Discussion Topics



# About us





We create exceptional multifamily communities that enrich lives and neighborhoods



# Vertically Integrated Platform

DEVELOPMENT     Dedicated Development, Construction  
and Asset Management Team

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RENOVATION     • Dedicated Investments and Asset  
Management Team

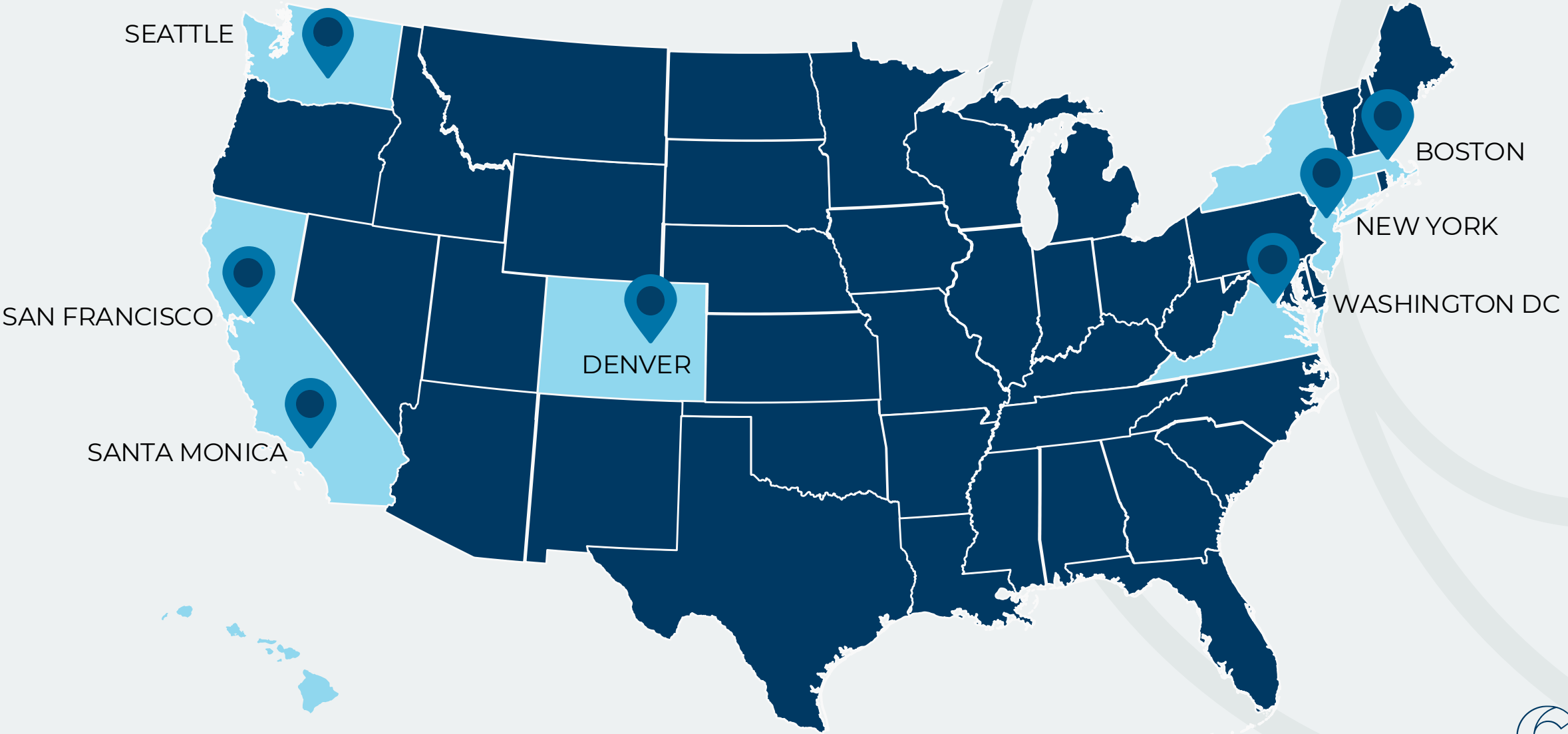
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DEBT     • Dedicated Debt Investments Team





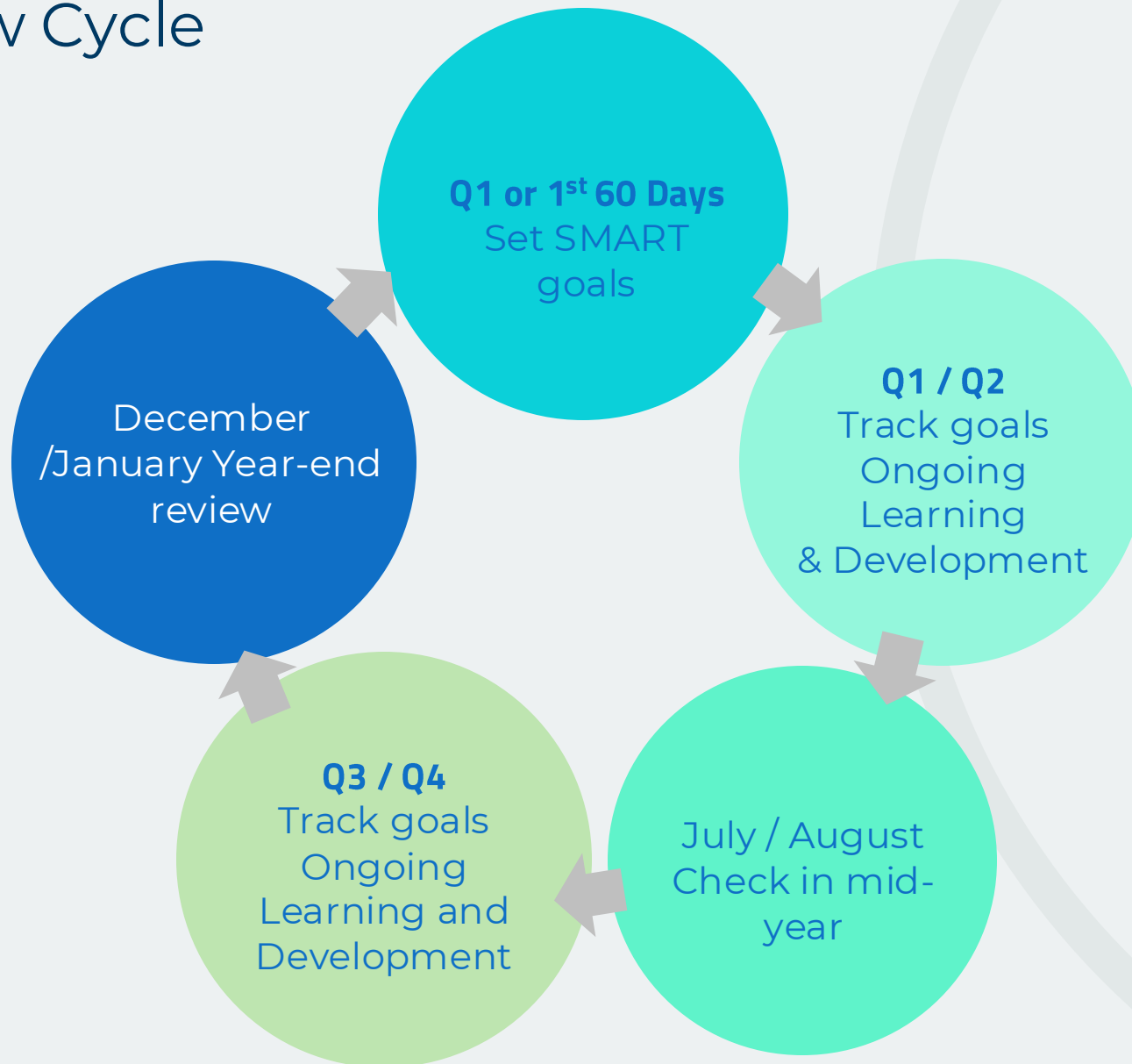
# Carmel Partners Markets



# Performance Management Cycle



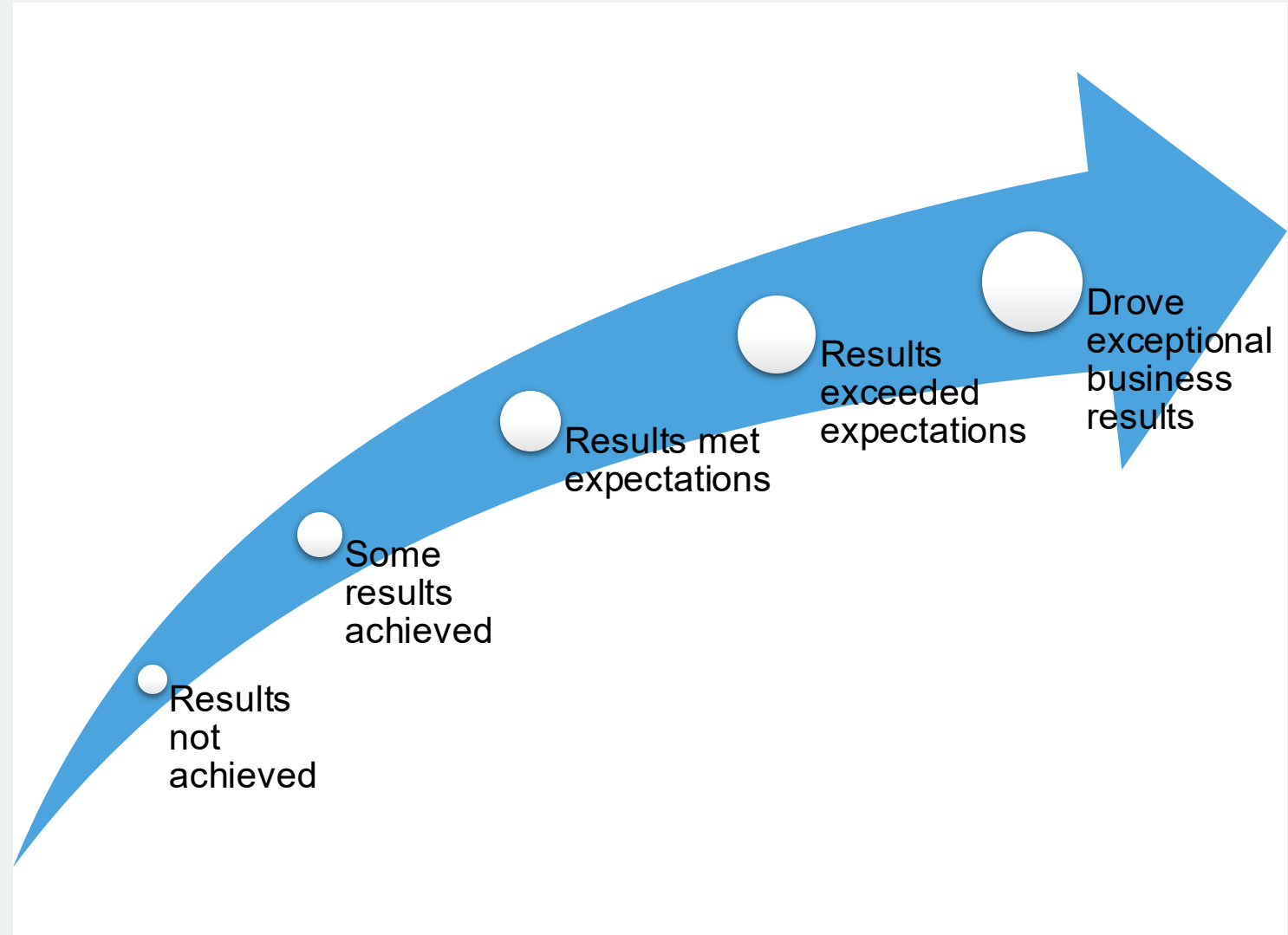
# Yearly Review Cycle





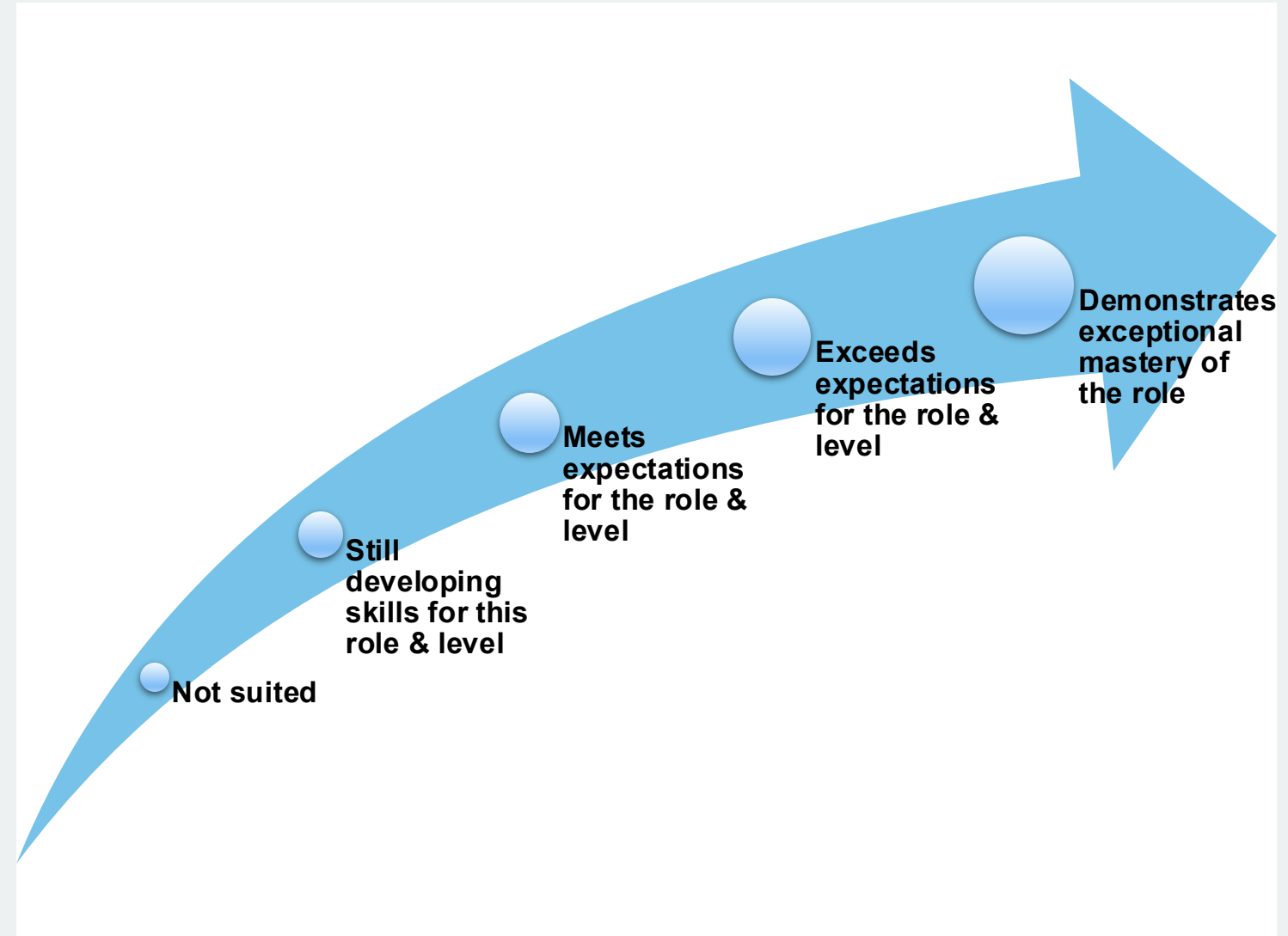


# Goal Ratings





# Overall Ratings





# Review Forms & Focus Areas



## ➤ **Mid-Year Check-In: A look forward**

- ☐ Self-Assessment & Manager Downward Review
- ☐ Goals status update
- ☐ Overall goal rating and comments
- ☐ How the manager can best support team member in accomplishing goals for the remainder of the year
- ☐ Career goals, skills and growth areas they would like to develop further and how the manager can support in achievement

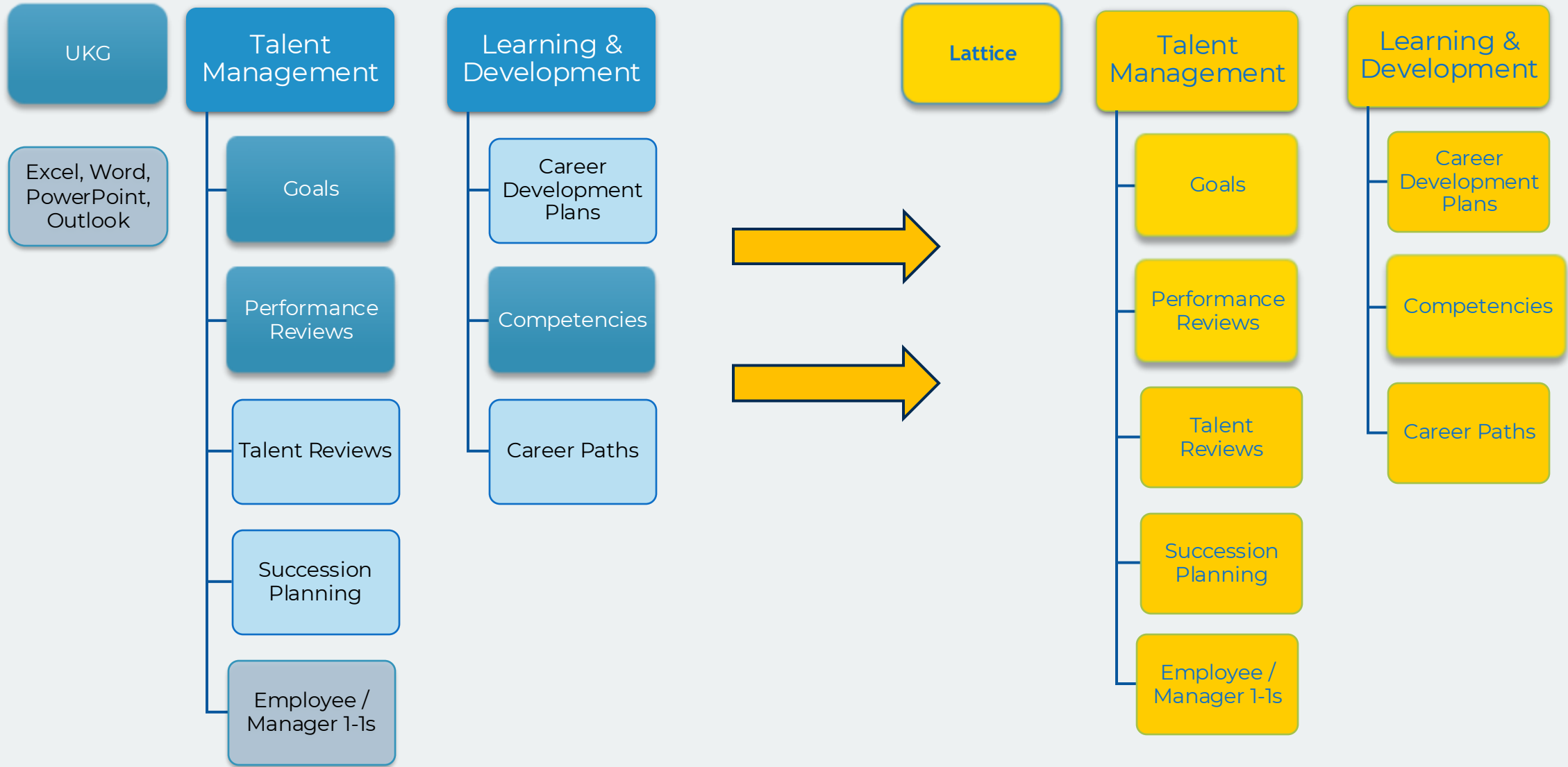
## ➤ **Year-End Review: A look back**

- ☐ Self-Assessment & Manager Downward Review
- ☐ Goals pulled into the review, rated, and comments
- ☐ Competencies are rated with comments
  - ☐ Communication & Collaboration
  - ☐ Planning, Organizing & Streamlining Work
  - ☐ Accountability & Driving Results
  - ☐ Technical Acumen
- ☐ Overall career development, skills and growth areas to focus on for following year

# Talent Management Platform - Lattice

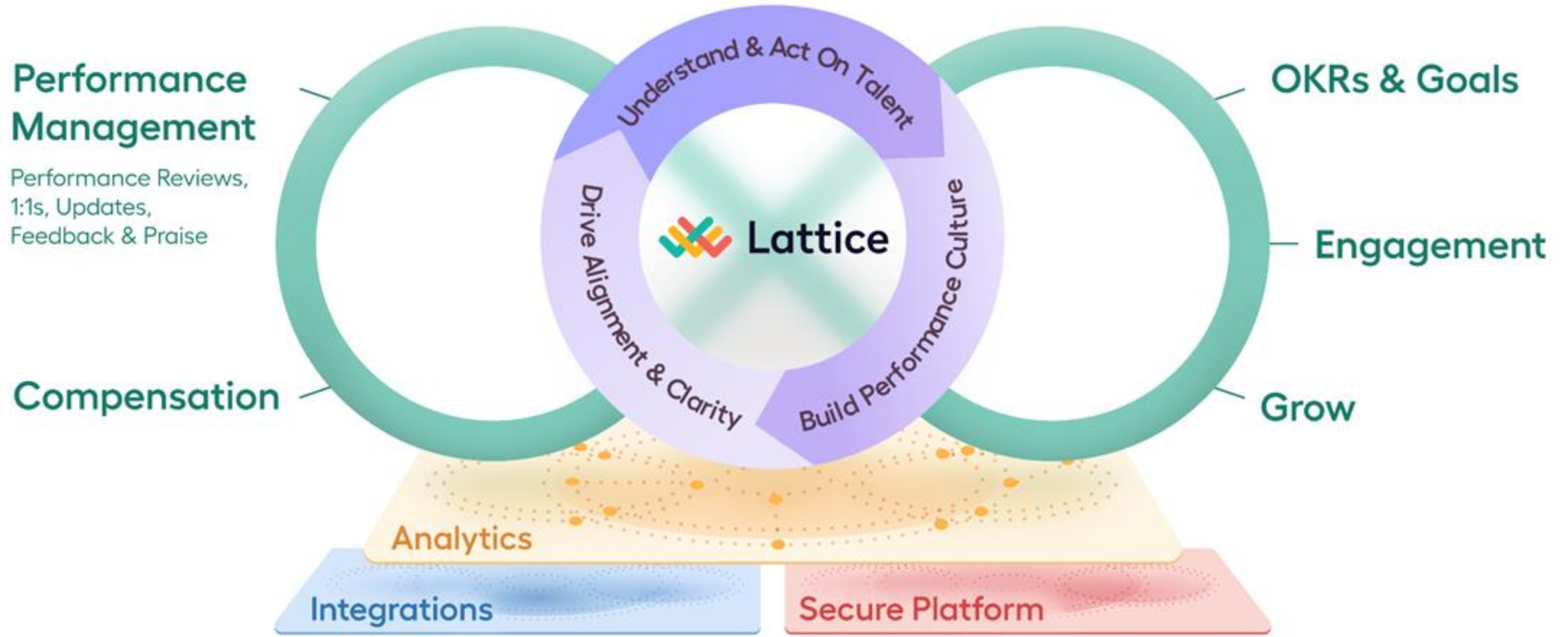


# Why Lattice?



# Meet the Moment with Lattice

Maximize your talent and deliver real business outcomes



# Continuous Improvement

## What's next on the roadmap

### Lattice Modules

- ❑ Career Tracks
- ❑ Competencies
- ❑ Individual Development Plans
- ❑ Talent Reviews
- ❑ Employee & Manager 1-1's





# Lattice Screenshots





# Lattice Homepage

Lattice

My team

1:1s

Feedback

Updates

Grow

Goals

Engagement

Reviews

Compensation

Reporting

More Treats & Co.

Tasks

Kyle Shanahan

Welcome, Kyle Shanahan!

Tasks (6) Sorted by priority

Write reviews for 360° Review [Basic: In-Flight]

Write reviews for 360° Review [Advanced: In-Flight]

Review compensation results Comp GA MDO Test 1 2022-09-20

Complete your compensation review for Multicurrency Comp

Respond to a quick pulse survey 5 questions

See all 6 tasks

Active goals (10)

5 On track

4 Progressing

1 Off track

Show more

Create Goal

Give or request feedback

More actions

Manager View org chart

Jaquan Camacho

Team

1:1s Add 1:1

Diana Glad Nov 17 @ 9:30 AM • 2 talking points

Alivia Mora Nov 17 @ 10:00 AM • 2 talking points

Sara Livingstein Nov 17 @ 10:30 AM • 2 talking points

Show more

Celebrations Birthdays

Show more



# Goals

Lattice

My team

1:1s

Feedback

Updates

Grow

Goals

Participation

Status

Engagement

Reviews

Compensation

Reporting

49ers

Tasks

Kyle Shanahan

## Explore

Your goals

Direct reports

Organization

Department

Company

All

Search owners and goals...

Filter

OWNER: Kyle Shanahan

STATUS: All Active

Update 9 goals

Create

Saved views

All time

Goals Cascade

Bulk Edit

Export CSV

TITLE	OWNERS	DUE	UPDATED	STAT.
Win 13 games		Dec 31, 2023	41 minutes ago	162%
Meet all headcount growth targets for all WCDI departments	P1	Dec 31, 2023	Aug 19, 2023	0%
Decrease the number of days needed to fully ramp up all WCDI new hires by 10%		Dec 31, 2023	Aug 17, 2023	58%
Improve our company-wide score on "My manager gives me actionable feedback on a regular basis" in our engagement survey by 18%		Dec 31, 2023	Aug 17, 2023	38%
Improve the diversity of our executive team by 20% this fiscal year.		Dec 31, 2023	Aug 19, 2023	33%
Launch Lattice GROW for all WCDI teams and departments		Dec 31, 2023	Aug 17, 2023	65%



# Performance Reviews

×

Simple Review Example

Autosaved Oct 10, 2023

Your reviews

+

Write reviews

SELF REVIEW

Teddy the Dood

DIRECT REPORTS

Alivia Mora

Diana Glad

Fletcher-Guerrero

Sara-Livingstein

Receive results

1. In what ways did this person contribute to our business success over the past performance period? \*

Be sure to cite specific examples.

Required: Write your response...

B I G L U

2. What developmental suggestions do you have for this person to focus upon over the next performance period? \*

Be sure to explain what the value this development effort would bring to our ongoing organizational success.

Required: Write your response...

B I G L U

3. Performance \*

Performance can be defined as how highly a employee performs

1

2

3

4

5

Write your response (optional)...

Overview

Show all

CURRENT TRACK

L3 - HRBP

View competencies

Reviews

Includes new submitted responses

7

Feedback

28

Goals

8

Growth areas

3

Updates

57

1:1s

64

Company values

4

Resources





# Career Tracks

Lattice		TRACKS	Competencies	L1 - People Operations Coordinator	L2 - People Operations Generalist	L3 - HRBP	L4 - Senior HRBP
<a href="#">My team</a> <a href="#">1:1s</a> <a href="#">Feedback</a> <a href="#">Updates</a> <a href="#">Grow</a> <b><a href="#">Career tracks</a></b> <a href="#">Goals</a> <a href="#">Engagement</a> <a href="#">Reviews</a> <a href="#">Compensation</a> <a href="#">Reporting</a> <a href="#">More Treats &amp; Co.</a>		<input type="text" value="Search tracks"/> CUSTOMER SUCCESS Customer Advocate Customer Success M... EPD Brand Design Engineering Manager Product Manager Software Engineer Technical Support Sp... EXECUTIVE TRACK Leadership FINANCE Finance MARKETING Product Marketing M... PEOPLE OPERATIONS <input type="text" value="People Operation..."/> SALES Sales Account Execut...	<b>Role-Specific Competencies</b>				
			Functional Experience	<ul style="list-style-type: none"> <li>You answer common user questions and know when to bring in other resources to help</li> <li>You research problems with direction from team members</li> <li>You have a general understanding of the organization and demonstrate a desire/curiosity to learn more</li> <li>You follow documented processes and research topics to make suggestions for improvement to the team</li> </ul>	<ul style="list-style-type: none"> <li>You have a deep familiarity and understanding of a wide range of People programs and you can identify/recommend best practices</li> <li>You reflect on and proactively address the downstream impacts of simple workflows and process changes</li> <li>You plan and pursue projects over an extended period of time with minimal direction</li> </ul>	<ul style="list-style-type: none"> <li>You are a subject matter expert in one or more area of People programs expertise and can provide recommendations to the organization on a wide range of topics</li> <li>You understand the inner workings of the HR tech stack and can manage complex workflows and process changes</li> <li>You assess the impact of changes to the organization and proactively address issues to ensure positive outcomes</li> <li><b>LMS Course:</b> <a href="#">Introduction to our HCM tech stack</a></li> </ul>	<ul style="list-style-type: none"> <li>You have a broad and deep expertise in multiple areas of People programs</li> <li>You focus on process improvement or projects that are aligned with the company's goals</li> <li>You develop solutions at a programmatic level</li> <li><b>LMS Course:</b> <a href="#">People Strategy Wheel</a></li> </ul>
			Problem Solving/Critical Thinking	<ul style="list-style-type: none"> <li>You know how to use the resources and tools that have been shared with you</li> <li>You ask questions about processes, systems or issues to develop a better understanding</li> <li>You demonstrate analytical aptitude and sound judgment</li> </ul>	<ul style="list-style-type: none"> <li>You can solve problems with data and analysis at a basic level</li> <li>You recognize trends in employee feedback and are able to consolidate ideas and present information in a succinct, digestible manner</li> <li>You identify areas for improvements and challenge the status quo where it makes sense</li> </ul>	<ul style="list-style-type: none"> <li>You are able to be strategic and operational in problem-solving for short- and long-term issues</li> <li>You have strong EQ in coming up with solutions that are aligned with goals and mitigate risk</li> <li>You can solve problems using data and analysis at an intermediate level</li> <li><b>LMS Course:</b> <a href="#">Statistical Data Analysis Techniques</a></li> </ul>	<ul style="list-style-type: none"> <li>You are able to select methods for evaluation and criteria to achieve results</li> <li>You systematically identify weaknesses and possible improvements, propose solutions, and implement them</li> <li>You know when is the right time for the organization to make improvements to processes</li> <li>You can solve problems using data and analysis at an advanced level</li> <li><b>LMS Course:</b> <a href="#">5 Advanced Data Analysis Techniques Applied to People Analytics</a></li> </ul>





# Development Plans

Lattice

My team

Alivia Mora

Diana Glad

Fletcher Guerrero

Kim Livingstein

Mia Richards

1:1s

Feedback

Updates

Grow

Goals

Engagement

Reviews

Compensation

Reporting

More Treats & Co.

Tasks

Teddy the Dood

Alivia Mora (she/her)

HR Business Partner

Overview

1:1s

Updates

Reviews

Feedback

Grow

Expectations

CURRENT TRACK

People Operations

Browse all tracks

Individual development plan

CAREER VISION

North Star Goal

The Big Picture

Know your SEO

GROWTH AREAS

Show active & drafts

LEADERSHIP - COMPANY WIDE

Establish a cross-functional team of talent experts

0 of 1 actions completed

Last updated Sep 20, 2023

COMMUNICATION & COLLABORATION - COMPANY WIDE

Improve my onboarding training skills

Last updated Jun 23, 2023

LEADERSHIP - COMPANY WIDE

Establish a cross-functional team of talent experts

Growth period ending on Mar 20, 2024 • Last updated 2 months ago

Description

Identify and form a group of leaders in our organization with a passion for developing talent.

Exposure

Leverage Samantha and Jaquan for the assistance in identifying potential team members.

Education

Enroll and complete the following LMS courses.

Communication Strategies for a More Effective Workplace

People Strategy Wheel

Hide details

Progress

Actions

Take leadership course through General Assembly

Nov 30, 2023

Add action

Feedback

Alivia doesn't have any feedback on this growth area.

Request feedback.

What updates would you like to share?

Summarize what Alivia has been up to







# 1:1's

Lattice

My team

1:1s

Alivia Mora

Diana Glad

Jaquan Camacho

Kim Livingstein

Feedback

Updates

Grow

Goals

Engagement

Reviews

Compensation

Reporting

More Treats & Co.

Tasks

Teddy the Dood

Switch to admin

Alivia Mora (she/her)

HR Business Partner

Overview1:1sUpdatesReviewsFeedbackGrow

Friday, Nov 24, 2023

NEXT

...

Agenda

☐ How do you feel your work/life balance is right now?

☐ Align on what the next phase of my career here might look like.

☐ What's something I should consider changing? (Please provide examples)

Maybe start our team meetings 5 minutes after the hour, Cael's manager does that and it's super helpful for their team!

Enter some text...

+ Add comment

☐ What feedback do you have for me, positive and/or constructive? (Please provide examples)

☐ What is most meaningful or valuable to you about your experience at work, and why?

+ Add talking point or + Add conversation starter

From meeting on Oct 27

Set development areas in Grow, instructions [here](#)

Add to agenda

Because you are Alivia's manager

About Manager

Belonging

Career Development

Job Satisfaction

Team and Company

Work from Home

Work Life

What is one thing you would recommend I do to be a better communicator?

Shuffle

Add to agenda

Action Items

☐ Reach out to Fletcher regarding handbook update

☐ Update operational goals / OKRs as needed

+ Add action item

Oct 27

Oct 3

Create meeting

Settings

About Alivia

2 active growth areas

9 active goals

Alivia's past events

Teddy the Dood

Alivia - You've done an incredible job with the HRIS rollout. We had some very unexpected hiccups, and we both learned a few lessons, but you navigated murky waters for clear eyes and a positive attitude. Thank you for leaning into that...

Show more

CLEAR EYES

CHOP WOOD CARRY WATER

SHIP, SHIPMATE, SELF

WHAT'S NEXT?

Sep 18, 2023

Good

What are your plans and priorities for next week?

We're nearing the finish line with the HRIS rollout. I'm planning to tie up some loose

Sep 18, 2023

View update

Great



# Breakout Discussion Topics



# 1. Performance Management Cycles and Approaches

**What are the different performance management cycles and approaches your company has implemented, and how have they impacted employee performance and engagement?**

- **Topics for Discussion:**

- Experiences with Different Cycles and Approaches: Share your experiences with various performance management cycles (e.g., annual, bi-annual, continuous feedback) and approaches (e.g., goal setting, 360-degree feedback).
- Best Practices and Challenges: Discuss the best practices for implementing these cycles and approaches, as well as the challenges faced and how they were overcome.

## 2. Effectiveness of Ratings in Performance Management

**What are the different performance management cycles and approaches your company has implemented, and how have they impacted employee performance and engagement?**

- **Topics for Discussion:**

- Experiences with Different Cycles and Approaches: Share your experiences with various performance management cycles (e.g., annual, bi-annual, continuous feedback) and approaches (e.g., goal setting, 360-degree feedback).
- Best Practices and Challenges: Discuss the best practices for implementing these cycles and approaches, as well as the challenges faced and how they were overcome.

### **3. Leveraging Analytics in Performance Management**

**How does your organization use data from performance management to influence talent-related strategies?**

#### **Topics for Discussion:**

- Utilizing Performance Management Systems: Share experiences with different performance management systems and their implementation and integration.
- Influencing Talent Strategies: Discuss how data gathered from performance management is used to shape talent acquisition, training & development, succession planning and retention strategies.
- Best Practices and Challenges: Exchange the best practices for leveraging analytics in performance management and the challenges faced in doing so.