Human Resource Associates
Employment Consultants

The Performance Evaluation Part IV-More Understanding and Being Understood

As we continue in this series on conducting performance evaluations let's list the previous issue titles. We began with:

- "Part I: The 10 Most Common Mistakes"
- "Part II: The Biggest Mistake"
- "Part III: Understanding and Being Understood"

In Part IV of Performance Evaluations, we will continue to focus on specific evaluation responsibilities, how well they are being accomplished, and the words and terms you can use to express the level of performance you need.

The responsibilities (evaluators) we will cover in this issue are:

Initiative
Supervision
Team Work and Relationship Building
Technical skills

Initiative
Meets / Exceeds Expectations

- Consistently pursues her own professional development
- Reinvents processes and redefines workflow in light of changing needs
- Is quick to apply newly acquired training tools
- Approaches clients with a can-do attitude
- Is willing to work whatever hours are necessary in order to get the job done
- Researches outside sources and best practices to improve knowledge
- Requires little or no direction in performing day-to-day responsibilities
- Looks for what needs to be done rather than waiting to be told
- Asks for additional responsibilities whenever possible
- Is not afraid to make errors

Needs Improvement

- Tends to have a "time-clock mentality"
- Fails to assume responsibilities beyond the basic, written job description
- Discourages others from assuming broader job responsibilities

- Lacks the confidence necessary to bring about needed changes
- Offers few creative ideas or alternatives
- Resists applying newly learned skills
- Fails to pursue out-of-the-ordinary solutions for customers with special needs
- Has trouble doing work without ongoing direction from management

Goals To Achieve
- Ask not what your company can do for you, ask what you can do for your company
- Don't wait for work to come to you, go out and find it
- Keep a notebook handy with shortcuts and rules of thumb to save time
- Attend two outside training programs or workshops to further your professional development
- Strive to become more independent in your role

Supervision
Meets / Exceeds Expectations
- Ensures that deliverables are achieved
- Regularly measures progress
- Sets clear guidelines and expectations for immediate staff
- Confronts problems head-on
- Clearly communicates roles and job expectations
- Regularly meets one-on-one with staff to show interest in their progress
- Commits individual action plans to paper
- Creates an environment where employees can motivate themselves

Needs Improvement
- Fails to establish realistic work demands
- Fails to address situations before they become major problems

- Allows interpersonal conflicts among subordinates to fester
- Rarely recognizes or appreciates exceptional performance
- Does not proactively address poor staff performance
- Allows staff members to work long hours of unscheduled overtime
- Fails to follow up on subordinates projects
- Uses a "my way or the highway" supervisory style

Goals To Achieve
- Set clear and measurable performance goals and objectives
- Clearly communicate roles and job expectations
- Inspire employees to take ownership of their performance improvement
- Communicate how individual goals align with company objectives
- Continuously monitor performance
- Address performance problems early on
- Regularly communicate expectations and give performance feedback
- Prioritize the workload based on current business needs
- Allocate resources more effectively

Team-work and relationship building
Meets / Exceeds Expectations
- Builds effective teams
- Encourages group participation and cooperation
- Capitalizes on the individual talents of team members
- Allows individuals to volunteer in their areas of interest
- Treats people with dignity and respect
- Provides encouragement when constructive criticism is necessary

- Is very effective in organizing team meetings
- Consistently brings out the best in others
- Resolves team conflicts without drama or histrionics
- Encourages open debate and sharing of ideas
- Shares the glory of success

Needs improvement
- Clearly prefers to work solo
- Tends to hog information and resources
- Allows team members to get easily sidetracked
- Does not encourage or support others who are facing difficulties
- Does not give credit where credit is due
- Discourages team members from volunteering ideas
- Shoots down untested suggestions and ideas
- Has taken credit for team members contributions
- Becomes antagonistic when her authority is challenged
- Engages in public shouting matches when he doesn't get his way
- Demonstrates a domineering style that puts others off
- "Talks over" those with conflicting opinions

Goals To Achieve
- Build, develop, and lead effective teams
- Use hands-on coaching and positive reinforcement to create camaraderie
- Regularly monitor team progress
- Provide training to enhance team effectiveness
- Hold teams accountable for performance goals

- Consistently recognize and reward collective efforts
- Look for ways to create cross-functional teams to boost productivity
- Foster a sense of shared responsibility
- Identify to all and consistently communicate the team vision
- Draw on the strength of individual contributors
- Develop skills for resolving disruptive behavior

Technical Skills
Meets / Exceeds Expectations
- Demonstrates mastery of technical tools and methods
- Creates results that can be easily replicated
- Excels at documenting necessary steps and results
- Focuses on increasing efficiency, raising productivity, and reducing costs
- Keeps abreast of current technology
- Uses statistical methods and a methodical approach to solve problems
- Provides well supported reasoning for technical recommendations
- Maintains technical and professional certifications
- Combines advanced technical know-how with solid communication skills

Needs Improvement
- Lacks the know-how to diagnose and repair basic systems
- Demonstrates only basic technical skills when advanced knowledge is needed
- Resists documenting procedures so that they can be repeated
- Does not use sound methods for diagnosing repetitive problems
- Fails to take advantage of training

- Fails to apply what is learned in training
- Lacks sufficient technical competence to generate confidence from clients

Goals to Achieve
- Demonstrate a thorough understanding of the technical aspects of the job
- Retrain in areas where you have become rusty or need improvement
- Translate technical jargon into user-friendly information
- Look for creative ways to apply technology to job tasks
- Improve your technical documentation skills
- Identify and recommend the training course(s) you need
- Keep current on changing technology and trends
- Promote new technology as a way to increase efficiency and reduce costs
- Train others so that they can develop and use new technology effectively
- Learn to operate equipment more efficiently
- Acquire your professional certification within the next year
- Connect to others in your field to learn new techniques

In Part V of our *Personnel Notebook* series on Performance Evaluation, we will focus on appraising performance in the areas of:

Organization and Planning Skills
Goal and Objective Setting
Judgment and Decision Making
Safety

We will then examine specific jobs and professions and the type of responsibilities recommended in evaluating their performance.

This series is focused on conducting performance evaluations for specific individuals. For additional information on creating a formal performance evaluation program for your company, visit The Association's Web site, and go to HR University in the "Member Center." You will find a *Personnel Notebook* in two parts titled "Performance Appraisals".

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