

PERSONNEL NOTEBOOK

For Your Most Important Resource—The Human Resource

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The Performance Evaluation Part V-Understanding More and Being Understood More

In this series on Performance Evaluations
We have covered to date:

- Part I - The 10 Most Common Mistakes
- Part II -The Biggest Mistake
- Part III -Understanding and Being Understood.
- Part IV – More Understanding and Being Understood

In this, Part V, we will continue selecting specific responsibilities to evaluate, how well they are being performed and the words and terms you might want to use to help your employee understand specifically what steps you want him/her to take next.

The specific responsibilities we will cover in this issue are:

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

Goal and Objective Setting

Meets / Exceeds Expectations

- Sets attainable goals that match up with staff's abilities
- Ensures that staff and each individual staff member understands objectives and end results needed
- Establishes standards that will stretch the limits of staff's abilities.
- Reviews results with staff on a monthly and quarterly basis
- Proactively shares results and progress with her supervisors
- Provides opportunities for others to rotate into key roles of responsibility
- Holds himself accountable for meeting performance goals and objectives
- Defines *measurable* outcomes to ensure that goals are reached and to what degree
- Sets aggressive targets to meet both short and long term business needs

Needs Improvement

- Is inconsistent in making assignments and setting objectives

- Fails to prepare appropriate back-up plans or alternative resources
- Provides vague instructions when staff needs more specific direction
- Does not communicate in advance that a deadline will not be met
- Leaves management feeling as if it's "flying blind" about progress
- Reluctance to delegate is causing delays and missed goals
- Is unwilling to assume responsibility for repeated errors, blames others
- Allows distractions to get in the way of achieving goals

Goals to Achieve

- Clearly communicate progress towards goals
- Employ metrics to track your productivity and efficiency
- Set attainable goals for your staff
- Assure that your goals are in line with the company's
- Meet regularly with your staff to review results
- Be as specific as possible when giving directions to your staff

Judgment and Decision Making

Meets / Exceeds Expectations

- Displays sound judgment when deciding among multiple alternatives
- Reaches conclusive decisions after researching alternatives thoroughly
- Remains an impartial and objective evaluator of facts
- Does not allow his emotions to cloud his business judgment
- Is decisive even in times of tight deadlines and budget constraints
- Encourages her direct reports to have equal input into decision making
- Is always able to identify the core issues at hand

- Makes confident decisions once she has gathered the facts
- Provides swift solutions to routine questions
- Demonstrates a specific focus on results
- Knows which problems require immediate solutions and which can wait
- Knows when to call in additional corporate support

Needs Improvement

- Makes decisions without weighing alternative courses of action
- Gets bogged down by "analysis paralysis" when forced to make decisions
- Complains openly about business problems to all who will listen
- Tends to use a "my way or the highway" approach to decision making
- Avoids confrontation and delays decisions that might upset others
- Does not consistently think through alternatives
- Does not give quick responses to *routine* questions
- Focuses more on avoiding mistakes than on achieving the goals
- Shares confidential information about the private affairs of coworkers
- Tends to exacerbate rather than to improve tense situations

Goals to Achieve

- Use business knowledge to make timely and effective decisions
- Demonstrate sound judgment under pressure
- Use appropriate and relevant information when making decisions
- Don't get bogged down by "analysis paralysis"

- Remain decisive and steadfast once you have communicated a plan of action
- Avoid sugarcoating disappointing news
- Wait to hear both sides of a story before making a decision
- Give more decision making responsibility to your subordinates
- Always assume responsibility for decisions gone wrong
- Make more cost effective decisions in line with the budget

Organization and Planning Skills

Meets / Exceeds Expectations

- Displays excellent organization and planning skills
- Takes a methodical and consistent approach towards organizing her work
- Locates back-up information quickly
- Plans, organizes and completes tasks in an acceptable time frame
- Does not go home at night until everything is put away in its place
- Develops practical alternatives to various “what-if” scenarios
- Has created a processing system that allows coworkers to step in during his absence
- Demonstrates a well honed ability to forecast potential problems and pitfalls
- Always plans tomorrow's goals before he leaves
- Manages multiple tasks effectively
- Documents repetitive tasks for easier repeats
- Is very effective in anticipating bottlenecks
- Is highly proficient in identifying resource needs in advance

Needs Improvement

- Has difficulty planning a course of action without specific instructions
- Does not plan ahead
- Fails to head off minor problems before they become major impediments
- Does not communicate when he requires additional support or assistance
- Has difficulty translating theoretical ideas into tactical action plans
- Demonstrates a reactive “management by crisis” style
- Gets lost in a myriad of details
- Has difficulty keeping two steps ahead of his current project load
- Quickly loses sight of the bigger picture
- Does not conduct proper needs assessments in the preplanning stage
- Does not consistently wrap up projects and loose ends cleanly

Goals to Achieve

- Plan your work and work your plan
- Become a more effective goal setter
- Prepare alternate contingency plans
- Rely on a daily planner to block periods of time for particular tasks
- Do not over-commit your time or resources
- Automate several of your repetitive or paper-intensive tasks
- Establish both short and long-term plans
- Establish both strategic and tactical action plans
- Translate goals into concrete action plans
- Always plan for the unexpected

Safety

Meets / Exceeds Expectations

- Adheres to company safety rules and security policies

- Remains aware of and reports potential safety hazards
- Consistently provides safety and emergency training to staff
- Duly familiarizes himself with safety instruments and resources
- Ensures employee compliance and disciplines workers who fail to wear appropriate safety gear
- Minimizes workplace injuries
- Is familiar with OSHA regulations
- Monitors visitors, vendors and suppliers to ensure a safe workplace
- Consistently maintains a record of zero safety violations
- Leads disaster drills and emergency evacuation planning exercises
- Provides safety and security training during new hire orientation
- Regularly publicizes available safety awards and incentives
- Recognizes and rewards good safety records

Needs Improvement

- Fails to document potential safety hazards
- Fails to wear the appropriate safety gear in the field
- Fails to maintain equipment as per manufacturers specifications
- Allows untrained people to operate equipment
- Is unable to account for increase in worker injury rates
- Has failed to take steps to resolve pending hazards in a timely fashion
- Does not measure and record safety data to identify trends and solutions
- Does not take or provide adequate safety training
- Unnecessarily sacrifices safety for productivity
- Allows a general disinterest or complacency regarding safety issues

- Fails to enforce safety and environmental issues

Goals to Achieve

- Identify and recommend solutions to safety problems
- Understand and comply with all safety requirements and policies
- Report safety hazards immediately
- Ensure that equipment is in proper working order and all safety features operational
- Stringently follow all recommendations outlined in safety manuals and material safety data sheets (HAZMAT)
- Train all staff in safety rules
- Cordon off areas that pose safety risks
- Be prepared for safety inspections at all times and immediately reply to all safety audit requests
- Maintain required licenses and certifications without exception
- Keep all work areas clean, neat and in order

In our next issue we will identify specific jobs and occupations and suggest the specific evaluators to apply to them.

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