Performance in the Workplace

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Summary

One year ago our department was reformed and reorganized. We hired 3 new employees to fill the position of instructional designers. These roles were to design training courses to roll out to the 11,000 employees in the network. Two of the employees “Jane” and “Jill” had a lot of difficulty adjusting to their new positions. Jill had been a network employee for 7 years in another department and Jane had worked for a large local urban university for 15 years before she left for the new position as instructional designer. Jill and Jane were both promised they would be sent for a specific type of training before they accepted the positions and then this promise was broken, after they were hired, when they were told there were no resources to send them to training. Both Jill and Jane were left out of training planning and were just handed the work after others had planned it. Jill eventually got so frustrated that she left the department, less than a year into the job, to work in the PI department. Jane began looking for a new position also. “Jean”, the third new hire had the same experience as Jill and Jane. She was thrown into creating elearning courses and working in an LMS that she was never trained on. She was put in some very bad positions because her boss would promise things she did not know how to deliver. One particularly bad situation was when the VP of learning told the CEO’s administrative assistant that Jean could deliver a very important elearning course to the board of directors in as little as a week. Jean worked overtime trying to complete the project and had no resources to help her. Jean also began looking for another position.

Jane tried to talk to her manager about her dissatisfaction. He then organized a meeting with someone from HR and they told her she would be let go in 30 days. She went back to her manager and told him that she thought he misunderstood her and that she wanted to be more involved in the work that was just handed to her. He put her on a performance improvement
plan. This was very distressing to Jane because she had been a very established and effective employee for the university she worked for prior to taking this position. However, her supervisor did not feel she was a “team player” or an effective employee. Jane attributed part of the problem to no formal onboarding and not being respected for the knowledge she brings from her 15 years at the university. Jane’s boss feels she is not an effective performer. The identified performance gaps are:

1. Lack of employee engagement
2. Employee lack of control over work given to them
3. Highly skilled employees not meeting manager expectations
4. Employees feel their work is not contributing to the organization’s goals

**Intervention 1: Performance**

**Performance aid intervention- Job aids**

*Description/explanation*

Using a manager approved flowchart to prioritize ad hoc training that is usually just handed to Jane without her input, may help cut down on frustration and increase Jane’s feeling of control. Help Jane prioritize her work by establishing set standards that will prioritize work requests from the department and from the organization.

*Application*

- Create a flowchart that takes the user through a sequence of steps required to achieve a result (*Appendix A*).
• Create a decision tree that helps determine priorities quickly by aligning requests from managers and other members of the organization with the department and organizational goals

_Evaluation:_

**Level 1 Reaction:** After implementing the job aids determine if the aids increased or decreased the ability to prioritize work requests. Create a form (Appendix B) that will provide a standard scale to collect quantifiable data regarding the user’s reaction to the job aid. Have the employee complete the form evaluation immediately after the first use of the tool.

**Level 3 Behavior:** Interview the user after 1 month to determine if change has occurred as a result of using the job aid. Look at the behaviors that need to be changed and determine through interview questions if these behaviors have changed.

**Level 4 Results:** Provide evidence that the job aids did or did not increase the productivity of the worker by evaluating the Level 1 and Level 3 data. Determine by the evaluation if meaningful change occurred.

Intervention 2: Environmental

_Provision of Information_

_Description/explanation_

Jane has been marked by her supervisor as not being a team player and as disengaged. The manager should know and accept that employee engagement is primarily the managers/organizations responsibility if the employee is a qualified candidate. One key
to engagement is to involve the employee starting with proper onboarding. Onboarding should provide information to help the employee progress through the first year of employment providing all of the organizational elements that are important for working and developing within the corporate culture.

Currently, new employees are lacking information required to function within the departmental culture, they have no goals or objectives, no clear job expectations, no communication about how they fit in the team and what role and responsibilities they have.

*Application*

Assist managers with developing a new hire manual that includes:

- The organizational structure
- Manager, departmental and employee goals and expectations
- Organizational goals and objectives
- The values of the department
- The mission of the department
- Expectations of the employee in meeting the organizational goals and objectives
- A list of resources for the employee (where to find benefit information, places to go to lunch, people who can help, etc.)
- A list of phone numbers of other members in the department and their titles and roles in the department
- Role and responsibilities of the employee
- What to wear to work (casual Friday rules, meeting attire, workday attire)
• Corporate campus map

Provision of Resources

*Description/explanation*

There are no standard processes for developing training. There is no training and development plan in place for employees. Jane had been offered the position with the promise that she would be sent to a credentialing and certification course so she could teach a course in DISC personality profiling. After she was hired the department told her there were no resources to send her to be certified. The training cost $2000.00, not an astronomical fee for a multi-million dollar corporation.

The department directors usually meet to discuss what type of training will be developed by the department. They do not do any type of formal needs assessment rather they come up with ideas and create classes. These classes are then passed down to Jane to develop. The only resource available to Jane is the internet and a small departmental library.

*Application*

• Suggest managers create a tool kit for developing courses according to organizational standards (*Appendix C*).

• Help managers create an employee development plan outlining the employee’s career goals and aligning it with the goals of the department. Then create a plan with action steps to attain the employee’s goals for themselves.

• Suggest that meetings involving planning should include all of the individuals who will be involved in that training’s facilitation.
• Suggest that managers provide employees with access to specialized materials, subscriptions and resources to create the training materials that will produce the greatest results.

Redesign of work environment

Description/explanation

Communication is a key variable in the day to day design work of the department’s instructional designer/educators. Barriers to communication must be broken down to allow for smoother idea-to-implementation transitions.

Application

• Identify barriers to communication and develop consistent open communication with employees
• Eliminate workplace hierarchy attitudes through leadership development
• Provide performance feedback to employees

Elimination of task interferences

Description/explanation

Jane is often times tugged in many directions at once. She is given assignments to teach material she is not familiar with having little time to learn it before the first class. Other times she is taken off of one training to facilitate something else. She has said that there are days when her head is spinning. She ends up confused and frustrated and sometimes
spends days devoted to developing a training only to be pulled away to start something else.

**Application**

- Suggest that departmental training meetings should be a weekly event where teams can discuss their goals and new ideas for training. The training should then be taken by the individual with the most interest.
- Help managers and employees set priorities so that teams know which training is the highest priority to develop and push out keeping all other new trainings to a minimum until one has been completed and implemented.
- Help create a process for determining what training they will develop and be sure the request for training aligns with organizational and departmental goals.

**Provision of Support**

**Description/explanation**

There is a lack of monitoring and feedback of employee performance. Jane was working very diligently for several months until her supervisor told her that she was not performing to his standards. One of the biggest issues for Jane was that her supervisor’s standards had not been communicated to her. It was at this point that she decided to start seeking employment elsewhere.

**Application**

- Help managers and supervisors define the expectations of the job. These expectations then need to be discussed with employees giving the opportunity for clarification.
Feedback must be given to employees on a regular basis so the employee knows they are on track.

- Help managers create a tracking system for each of their direct reports where they can chart expectations with actual performance. Managers can then support their employees if there are downturns in performance and both employee and manager can work out a plan to overcome performance deficiencies.

_Evaluation_

**Level 1 Reaction:** Immediately after providing tools evaluate the user’s reaction to the tools now in place to create employee engagement using a form designed to provide quantitative data.

**Level 3 Behavior:** After three months of implementation of the materials listed, use a questionnaire to determine if behavior has changed for both the employee and managers. Set up a time to interview the employee and the managers separately to identify areas that have changed and those that have not changed. Ask the managers how they feel they have changed and the impact on the performance of the employee and ask the employee if she has changed and the impact on the organization. Ask the employee if she feels that management has made noticeable changes.

**Level 4 Results:** Provide results to the managers and employee on the change resulting from the implementation of the tools. If no change has occurred, evaluate the cause.

**Intervention 3: Emotional**

**Provision of incentives/consequences**
Description/explanation

The department has implied consequences for lack of performance however there is no reward system in place for excellent or improved performance. Jane found this out when her manager met with her and an HR representative after she was honest with him about her feelings. She told him that the position is not clearly defined and she felt she was not the right fit to work in this type of environment. He took this as a resignation instead of talking with her about how things might be improved. Jane had always been a high performer in positions that had established goals and organizational standards. She was unsure how to work in an environment without this structure and she felt like a failure.

Application

Provide a rewards system that honors employee contributions, improvements and excellent performance through (Appendix D):

• Praise from manager
• Acknowledge employee’s work especially when they go above and beyond to make a difference in the organization.
• Giving more responsibility leading to career advancement
• Provide funding for conferences or development training

Evaluation

Level 1 Reaction: After management has agreed with and developed an incentive plan allow the employee to view the plan and give feedback (Appendix E).
**Level 3 Behavior:** Put the incentive plan into practice and re-evaluate in 6 months of implementation. Interview the employee and managers to determine if change occurred.

**Level 4 Results:** Use the feedback from the employee and the results of the interview to determine if change occurred. If more time is needed, return in 3 months to re-evaluate.
Resources


http://www.anekaaward.com/whatmakesgoodreward.html?wwparam=140672150


Employee recognition program guidelines. Adapted from Texas A&M University Human Resources. Retrieved from: http://employees.tamu.edu/recognition/resources/guidelines/


http://www.simplypsychology.org/maslow.html

Appendix A

Project Flowchart

Start

Has a needs assessment been completed?

Yes

Is the project tied to an organizational pillar?

Yes

Determine...

WHO
Who is the project for?

WHAT
What is/are the expected outcome?

WHEN
When does the project need to be completed?

WHERE
Where will the intervention take place?

HOW
How will the intervention be measured for success?

Proceed with research and development

End

No

Return to manager for clarification

No

Return to manager for clarification

Y
es

Return to manager for clarification

No

Return to manager for clarification

No

Return to manager for clarification
Appendix B

**Reaction to the performance intervention job aid**

Use the following rating scale to evaluate the questions below (circle one for each question):

1=Strongly Disagree; 2-Dissagree; 3-Not sure; 4-Agree; 5-Strongly agree

1. The steps in the flow sheet were easy to follow.
   Comments:

2. The steps in the flow sheet are relevant to my job.
   Comments:

3. The flow sheet will help me decide how to proceed with the projects I am given.
   Comments:

4. I feel the flow sheet will help me do my job better.
   Comments:
5. I feel the flow sheet will lessen my frustration with the project determination process.

Comments:

6. This is what I would like to change about the flow sheet:

Appendix C

Course Development

**Step 1: Determine what method of delivery you want to use.**

For example:

- Training courses and workshops;
- Courses taught by universities and other organizations;
- Distance learning;
- On-the-job training;
- Orientation sessions;
- Peer-based methods;
- Self-directed learning;
- Tutorials; and
- Large professional conferences, conventions, and retreats.

**Step 2:** **Identify the topic you want to train on**

Ideally your topic will be based on a needs assessment or some other type of needs analysis.

Occasionally you will be asked to develop a course without a prior needs assessment. This
course may be aligned with a new policy or procedure handed down from the corporate office. Please try to be flexible in approaching course development in this manner. If you have any questions please consult your manager.

**Step 3: Identify Subject Matter Experts (SME) and form a group of others who can assist you with development.**

This group should be able to help with the planning, acquisition of resources, design, development and implementation of the course (please consult the employee resource manual for names of individuals who may be able to assist you).

**Step 4: Identify your audience**

Identify the background and knowledge of your learners. Identify who will need pre-training skills, who may need additional training and how the learners see you and your role within the organization. Identify the size of the group and if there are any special needs in the group.

**Step 5: Identify incentives to take the course**

Is there possibility of promotion if the course is attended? Are continuing education credits available for the course? Are there penalties for not attending?

**Step 6: Gather resources**

Identify who is paying for the training, if traveling is involved, if you need to reserve a room for the course, the books, videos, handouts you will need, and equipment that is necessary to successfully run the course.

**Step 7: Identify the course objectives**
Objectives should be specific, measurable, attainable, and aligned with the organizational goals and objectives.

**Step 8: Create course material**

Find materials already in existence, or use a blended approach to learning. If you are creating your own materials implicate your design team heavily. You may be able to find a variety of training methods including games, group discussions, panels, case studies, lecturing and role playing are a few of the methods you may want to investigate.

**Step 9: Pilot your training if possible**

Pilot your material before presenting it to your target audience. Use members of your department or team to take the course and give feedback.

**Step 10: Develop your evaluation tool**

Create and evaluation tool that will be able to align your training goals with the organizational goals. The evaluation should be designed according to Kirkpatrick’s Four Levels and be able to quantify if learning took place. You also need to consider how to determine on the job application and change in behavior. This can be done by observation or surveys and interviews after appropriate implementation time has been given.

Appendix D

**Employee recognition plan**

- Praise from manager
• Acknowledge employee’s work especially when they go above and beyond to make a difference in the organization.

• More responsibility leading to career advancement

• Provide funding for conferences or development training

According to Rodd Wagner and James Harter in, *The 12 Elements of Great Managing*, recognition and praise for doing great work comes in at number four. Based on Gallup’s world’s largest study on employee engagement, this element contributes highly to employee motivation. However it needs to be done in the right place and at the right time. Accolades and calling people out for praise in front of a group can cause embarrassment, jealousy and other unintended negative feelings. The best time for praise is in a face-to-face with the employee. Recognition however can be done in a group setting if the entire group is being recognized.

Robert Maslow’s hierarchy of needs fits praise and recognition into the Love and Belonging category. When employees are praised they feel a sense of appreciation which creates a feeling of belonging and being effective in the organization. They feel that their work is important.

While the manager should have the most influence over praise and recognition, the department can create a departmental rewards and recognition plan. To do this the department should:

1. **Establish a Committee**

   The members should consist of both employee peers and management with representation from each unit in the department. Identify how these members will be selected (election or based on committee experience), then elect a chair to oversee the program development. The members will also need to determine a service length so that others have a chance to serve on the committee and the ideas and attitudes stay fresh.
2. Determine Objectives

After meeting and gathering input from the committee, the following objectives were determined:

- The program should encourage regular praise from manager
- The program should acknowledge employee’s work especially when they go above and beyond to make a difference in the organization.
- The program should allow for more responsibility leading to career advancement
- The program should provide funding for conferences or development training

When the objectives have been determined, the committee will decide to implement a formal recognition plan or an informal recognition plan. This can be created using Jim Brinntall’s (2002) SMART philosophy.

S=Sincere-make sure the appreciation is genuine
M=Meaningful-align rewards with the receivers and organizations values
A=Adaptable-be creative
R=Relevant-personalize the reward
T=Timely-respond quickly to ensure the motivating effect of the reward

3. Identify the Criteria for Selecting the Reward

Examples:

- Teamwork
4. Determine Award Eligibility, Frequency and Selections

The committee will need to determine who is eligible for a reward. While all employees are eligible for verbal praise, any departmental funds spent on the reward may have to meet specific criteria. Eligibility should be considered for: status, length of service, conflict of interest like that of committee members and how often the same employee is eligible.

Determine what the rewards will be. Examples that were stated earlier are:

- Praise from manager (verbal praise, cards/thank you note or certificates).
- Acknowledge employee’s work especially when they go above and beyond to make a difference in the organization (public recognition and plaque. Flowers, tickets to events, gift cards).
- More responsibility leading to career advancement (increase in pay, one-time bonus).
- Provide funding for conferences or development training

5. Nominating/Selection Process

Determine the confidentiality of nominees, who is eligible to nominate, and how nominations will be submitted.
Define the following:

- Rating process and procedures, reviewers, committee member length of membership, who makes the final decision, if past recipients can serve on the committee, and if committee members are eligible for reward nominations.

6. Program Marketing

Decide how the committee will get the reward communication procedure out to the rest of the company or department. Will it be email, newsletter, website, bulletin board or at regularly scheduled meetings.

7. Get Approval and Determine Effectiveness

After the program is up and running, survey the employees to get their approval rating. As the organization changes there may be updates that are needed to the original process. Track the effectiveness of the program and its impact on employee engagement through a manager survey.

Appendix E

Employee Project Feedback Regarding Manager

Name of evaluating employee______________________________

<table>
<thead>
<tr>
<th>Manager Name</th>
<th>Department</th>
<th>Role in Project</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Evaluation Response</th>
<th>Rating: Circle one for each evaluation.</th>
</tr>
</thead>
</table>
My manager was accessible if I had questions about the project. | Always | Almost | Sometimes | Rarely | Never
--- | --- | --- | --- | --- | ---
My manager fully understands the project and all of its implications. | Always | Almost | Sometimes | Rarely | Never
My manager was open to my suggestions for the project and fully considered my opinions and ideas. | Always | Almost | Sometimes | Rarely | Never
My manager respects my work. | Always | Almost | Sometimes | Rarely | Never
My manager helps provide all of the resources I need to complete my project. | Always | Almost | Sometimes | Rarely | Never
My manager mentors me so that I can improve project outcomes. | Always | Almost | Sometimes | Rarely | Never
I was able to fully participate in all decisions regarding the project. | Always | Almost | Sometimes | Rarely | Never

**Manager Feedback Regarding Employee**

Name of evaluating manager: _______________________________________________________

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Department</th>
<th>Role in Project</th>
</tr>
</thead>
</table>

**Project Evaluation Response** | **Rating: Circle one for each evaluation.**
<table>
<thead>
<tr>
<th>Employee seeks out answers to questions he/she had regarding the project</th>
<th>Always</th>
<th>Almost</th>
<th>Sometimes</th>
<th>Rarely</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee fully understands the project and all of its implications.</td>
<td>Always</td>
<td>Almost</td>
<td>Sometimes</td>
<td>Rarely</td>
<td>Never</td>
</tr>
<tr>
<td>Employee is willing to discuss any interjections I have about the project course</td>
<td>Always</td>
<td>Almost</td>
<td>Sometimes</td>
<td>Rarely</td>
<td>Never</td>
</tr>
<tr>
<td>Employee participates in all decisions regarding the project.</td>
<td>Always</td>
<td>Almost</td>
<td>Sometimes</td>
<td>Rarely</td>
<td>Never</td>
</tr>
<tr>
<td>The employee is a team player, develops his/her ideas and is able to articulate how these ideas will contribute to the desired outcomes</td>
<td>Always</td>
<td>Almost</td>
<td>Sometimes</td>
<td>Rarely</td>
<td>Never</td>
</tr>
<tr>
<td>The employee shows interest and enthusiasm in project planning</td>
<td>Always</td>
<td>Almost</td>
<td>Sometimes</td>
<td>Rarely</td>
<td>Never</td>
</tr>
</tbody>
</table>