

performance

retention guides for skilled trades employers

one in a series of three

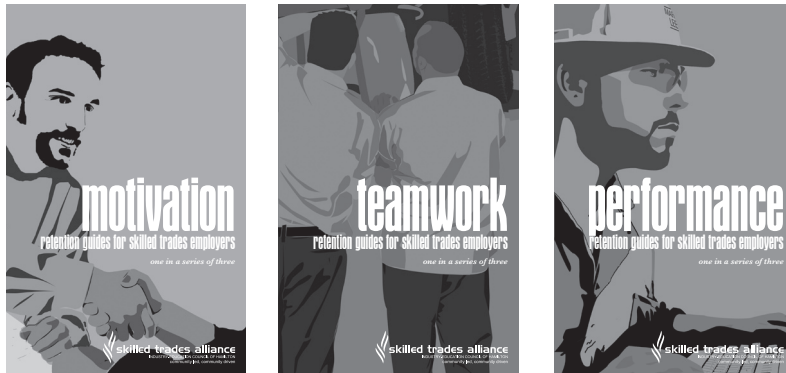


skilled trades alliance

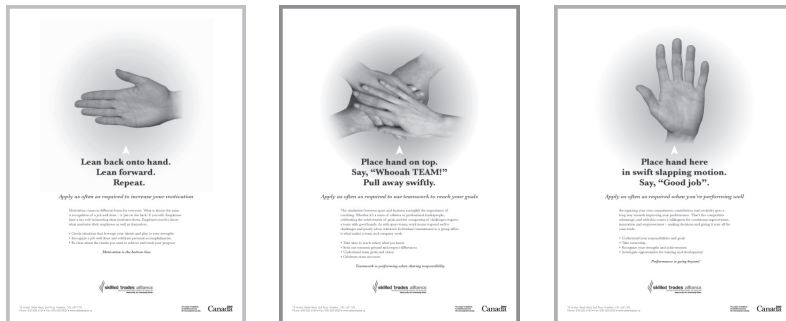
INDUSTRY-EDUCATION COUNCIL OF HAMILTON
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This retention guide has been created through a collaborative effort of skilled trade employers and stakeholders — community members that lead and drive the Skilled Trade Alliance™.

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Understanding *Performance Management* as a method of retention reflects a change of emphasis in organizations away from a top-down approach to a working model that involves engaging your employees. The message is similar in this guide, as in the Motivation and Teamwork guides, in the sense that identifying the importance of relating work performance to meeting the strategic or long-term goals of your organization is important to success.

The performance management process provides an opportunity for your employees to discuss development goals and help create a plan for achieving your company goals. Development plans should contribute to your organizational goals and the professional growth of the employee. The planning process must also involve any considerations of your overall industry.

Success in a skilled trades environment is sometimes determined by being busy; however, being busy is not necessarily the same as producing results. Training, strong commitment and hard work will not alone produce overall effectiveness. The major contribution of performance management is its focus on achieving results. Performance management redirects our efforts away from being busy towards effectiveness.

The natural competitiveness of skilled trades occupations has put more focus on effectiveness, and systems and processes can be applied in the right way to achieve the right results in your organization. This guide underscores the education, training and development elements important in helping your business perform. Continuous learning is a prerequisite to successful job performance and organizational effectiveness. Skilled trades employees must be able to learn work, developing effective technical and people skills in order to assume new responsibilities, and keep pace with and anticipate the changing nature of their industry and workplace. Guide parts one and two provide insights on establishing and evaluating success in these areas.

As an employer, responding to these changes requires the ability to learn, adapt to change, solve problems creatively and communicate effectively in diverse groups. In addition, employees must take personal responsibility for their careers to ensure future employability and advancement. Guide part three deals with rewarding those employees, and yourself, when reaching the performance goals of your organization.

Strategic planning is the first step to establishing performance goals and plans. Strategic planning helps determine where your organization is going over the next year or more and how you're going to get there. The focus of a strategic plan is usually on the entire organization, while the focus of a business plan is usually on a particular product or service.

There are a variety of models and approaches used in strategic planning. The way that a strategic plan is developed depends on the nature of your leadership, the culture of your workplace, the complexity of your industry or environment, the size of your workforce and the degree of available expertise, to name a few.

The most common method in establishing goals is, appropriately called, goal-based planning. Goal-

Determining the detail of the plan is up to each individual business owner. For example, some plans include only top-level information and no action plans.

Understanding The Benefits of Goal-Based Performance Planning

1. You can clearly define the purpose of your organization and establish realistic goals and objectives consistent with your mission in your desired time frame.
2. You have a responsibility to communicate these goals and objectives to your employees.
3. You develop a sense of ownership of the plan.
4. You can ensure the most effective use is made of your organization's resources by focusing the resources on the key priorities.
5. You provide a base from which progress can be measured and establish a mechanism for informed change when needed.
6. You bring together the best efforts of your employees, building a consensus about where your organization is going.

Some performance plans allow a company to look ahead from one to ten years into the future.

based planning starts with a focus on your mission (and vision and/or values), goals to work toward your mission, strategies to achieve your organizational goals and an action plan. Some performance plans allow a company to look ahead from one to ten years into the future.

As a result, these performance benefits can:

- Provide clearer focus of your organization, producing more efficiency and effectiveness.
- Bridge employees with clients/supervisors.
- Promote the creation of strong teams in your workforce.
- Provide the motivating force that keeps valued employees together.
- Produce great satisfaction among those that share your common vision.
- Increase productivity from increased efficiency and effectiveness — your bottom line.
- Solve major problems.

(McNamara, 1999)

SMART Goals

Organizational goals are often established during strategic planning. Performance management translates these goals to results, which typically are described in terms of quantity, quality, timeliness or cost. Results are the primary products or services derived from the performance process. Goals should be “SMART” – Specific, Measurable, Acceptable, Realistic to achieve and Time-bound with a deadline.

Developing a Performance Plan

When reviewing the steps to developing a performance plan, it may be best to first focus efforts on employee performance management, beginning with a Job Analysis. The next step may then be followed with performance efforts focused on the entire organization.

Employee Performance Management

Job Analysis

A Job Analysis provides an objective basis for hiring, evaluating and training, targeting an improvement in overall job performance for your organization. Analyzing a job, not the person who fills it, is the first step in determining whether or not the job is capable of meeting your organization’s goals. Consider four determinants:

- Determine the reason for the job.
- Determine the job duties which are critical or fundamental to the performance of the job.
- Determine the working conditions where the essential functions are to be performed.
- Determine the minimal skills an individual must possess to perform the essential functions.

All hiring decisions should be made on objective criteria. You’ll need to understand the parameters of each job in your organization and the qualifications needed to perform it, in order to objectively evaluate your

- What are the specific physical or evaluative measures needed to perform the job (standing, climbing, kneeling, lifting, digging, interpreting, analyzing, coordinating, etc.)?

Goals should be “SMART”—Specific, Measurable, Acceptable, Realistic to achieve and Time-bound with a deadline.

employee’s performance. Pre-screening applicants and initiating performance appraisals also rely on understanding the components of a job.

To conduct a Job Analysis, determine the purpose of the job, the essential functions of the job and the setting of the job.

Purpose:

- What requirements of the job go towards the overall objective of your organization?

Essential Functions:

- What three or four main activities make up the job? Weigh the necessity of each.
- What is the relationship between each of the activities? Is there a special sequence for each activity to follow?

- How many other employees are available to perform the job activities? Can the performance of a job activity transfer among other employees?
- How much time is spent on the job performing each particular activity?
- Would removing an activity alter the job?
- What happens if an activity is not completed on time?

Setting:

- **Location:** Are all job activities capable of completion within your workspace or do they extend beyond your walls?
- **Organization:** How is the work organized for maximum safety and efficiency? How do your employees obtain necessary equipment and materials?
- **Movement:** What physical/evaluative measures are required of your employees?

- **Conditions:** How do the conditions of your work environment affect the activities of the job (hot, cold, damp, inside, outside, underground, wet, humid, dry, air-conditioned, dirty, greasy, noisy, sudden temperature changes, etc.)? What are the social conditions of the job (works alone, works around others, works with the public, works under close supervision, works under minimal supervision, works under deadlines, etc.)?

You'll also need a sense of the qualifications necessary for your employee to accomplish the activities of the Job Analysis. Your employees should know:

- The physical requirements of the job
- The general skills needed for the job
- The specific training that is necessary for the job
- The previous experience, if any, an employee can replace or substitute to meet job requirements

Several methods of Job Analysis exist that may be used individually or in combination. These include:

- Review of job classification systems
- Interviews
- Industry expert panels
- Structured questionnaires

- Task inventories
- Check lists
- Observation
- Work logs

After completing a Job Analysis, you will be in a better position to address four key determinants:

- The reason for the job: Objective job-related interview questions.
- Job duties, which are critical or fundamental to the performance of the job — write current and accurate position descriptions. Position descriptions should be updated on a regular basis and a job analysis done if any factors outlined above have to be altered.
- Working conditions where the essential functions are to be performed — perform objective performance appraisals that assess the effectiveness of the working conditions.
- Minimal skills an individual must possess to perform the essential functions — promote training opportunities or advancements in responsibilities.

Criteria for evaluating the effectiveness of your employee(s) performing varied job activities will be covered in Part 2 of this guide.

(U.S. Department of Labor)

Organization Performance Management

It is generally useful to follow-up on a Job Analysis by taking a broad look at your organization. This is typically done by conducting an environmental scan, SWOT analysis, and/or by using a variety of organizational assessments or measurements.

Environmental Scan

With a vision and/or mission in place for your business, you have a picture of where you want to go. Understanding how you need to perform to get there is to understand where you are now. This is the process of taking stock and involves thorough examining of both the internal status of your workforce and the external context in which it affects your industry or client base.

Collect data on your organization to answer questions about the present and future. Scanning will help:

- Get all your employees on the same working principles for your organization.
- Begin to identify strengths, weaknesses, opportunities and threats (SWOT).
- Expose any overlooked information or past policies/procedures.
- Create an on-going process for

internal and external procedures that are flexible enough to changing conditions.

Consider these approaches to environmental scanning:

- Surveys
- Questionnaires
- Focus Groups
- Open Forums

This could be as simple as conducting a brief team meeting, encouraging an open-door policy or starting a suggestion box.

SWOT Analysis

A common and effective way of managing performance is identifying your assets and liabilities by undergoing a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats). Use Worksheet 1 (page 10) as a basic platform for an internal/external SWOT analysis.

You can further apply your SWOT analysis to any specific Job Analysis you have done for your organization by using the platform in Worksheet 2 (page 10).

Worksheet 1: SWOT Analysis

Factors	Internal	External
Positive	Strengths	Opportunities
Negative	Weaknesses	Threats

Worksheet 2: Job Analysis

Internal Factors that might prevent an employee from performing this job effectively?	
Strengths	Weaknesses
External factors that might prevent an employee from performing this job effectively?	
Opportunities	Threats
What aspects of the Job analysis need to be strengthened in order to be effective?	

(National Network for Health)

The Foundation for Strategic Performance Goals

The outcome of Employee Performance Management (Job Analysis) and Organization Performance Management (Environmental Scan, SWOT Analysis) will provide the basis for which to identify strategic issues and goals. Ensure the following measures are met before incorporating any Performance Management goals:

1. Identify issues by answering questions such as: “What changes outside the organization could effect me and the team?”
“What would these changes promote in terms of threats or opportunities?”
“What changes must we make to address the threats?”
“What strengths can we build on to take advantage of the opportunities?”
2. Make use of collecting and organizing employee input over a set period.
3. Visit equally with each issue, whether it’s “important” or “urgent.”
4. Gain consensus with your employees on the top three to five issues and goals, and then prioritize them.
5. Dissect your SWOT analysis — take issues and goals from strengths and build on them, understand what weaknesses need to be strengthened and take advantage of your opportunities while avoiding the threats to your organization.
6. Base some issues on gut feeling or intuition, rather than by-the-book assessments.
7. Don’t get bogged down by issues that are too narrow that will take up valuable planning time. By the same token, focusing on some issues that are too broad will also bog you down.
8. Deal first with the performance issues that you can do something about right away.
9. Don’t let a shortage of resources make you reactive rather than proactive.
10. Organization issues should be clear so that your clients or suppliers outside of the organization can understand.
11. Verify any ideas against reality by designating an employee to be a team leader by asking straightforward questions, in an effort to get other team members to examine the current suggestion or idea before accepting it.
12. Be careful not to ignore current major issues in the interest of pursuing more creative and forward-looking goals.
13. Finally, configure your analysis findings into goals. Goals should be worded such that, when they are reached, they will have

addressed an issue of your organization. Constantly review the wording of these goals to ensure all your employees understand the goals and that when reached, they will have successfully addressed an organizational issue.

(McNamara 1999)

Use Worksheet 3: Performance Planning as a formal or informal tool to document performance-related employee development objectives. Worksheet 3 will help you to relate the specific functions and tasks identified in your Job Analysis with your organization's SWOT findings, further identifying your annual goals and associated performance standards to meet your goals.

Workchart 3: Performance Planning

Function / Goals For Performance
Enter essential functions or annual goals you want an employee(s) or your organization to reach. For example, identify and increase training opportunities.
Specific Task To Reach Goals
List the tasks related to achieving the function or goal. For example, coordinate programs that specifically train in the areas needed.
Performance Standards
For each function, goal or task, consider those training, education, or development actions that may support improvement of your employee performance or professional strengths. For example, training will take place on company time and come with performance measurements and rewards when met, etc.
Plans for Development
Enter the recommended employee actions. Include the name of specific training programs, team members or resources involved in the accomplishment of your plan. Provide a date for the development action to be completed. For example, take training course XYZ – meet with team to determine best training times, etc.

(University of California, San Diego)

Part Two: Evaluating Your Organization's Goals

The overall goal of performance management is to ensure that your organization and employees are working together to achieve the organization's overall goals.

Achieving your goals requires several ongoing activities, including continuously identifying and prioritizing new opportunities for employees and your organization.

Goals themselves are also considered measures of your business success.

The Performance Appraisal

Performing performance appraisals on technical-oriented occupations, such as the trades, can be more difficult than other routine or production-oriented occupations. However, it is safe to expect that you may have a few apprentices come along who want developmental planning to sharpen their skills and production.

You can decide on what approach you want to use to appraise performance within your workforce. Using a Traditional Approach will focus more on your overall organization and draw comparisons with past performance. Using a Developmental Approach will assess the employees as individuals with the outcome being a working set of goals for the organization to work towards.

Traditional Performance appraisals serve the following purposes:

1. Promotion, team-building and reallocation of employees.
2. Feedback to the employee regarding how the organization viewed the employee's performance.
3. Evaluate those contributions made by your employees in achieving the goals of the organization.
4. Establish criteria for evaluating the how and where your employees are placed.
5. Reward decisions, including financial incentives, promotions and other rewards.
6. Identifying training and development decisions.
7. Establishing criteria for evaluating the success of training and development decisions.
8. Provide information on how to better schedule your workforce, budget time and money appropriately and better plan your human resources.

Developmental Performance Appraisals serve the following purposes:

1. Provide your employees with the opportunity to use their ambition to reach a certain level of performance they dictate as success.
2. Allows you to show interest in employee development, which

Performance Appraisals?

Feedback and communication on performance should be discussed on an ongoing basis throughout the year. In addition, a formal performance appraisal discussion should be conducted as an annual two-way discussion with each of your employees. As a result, you and your employee should agree on a new set of goals or development plans.

focuses on the retention of those employees you invest training dollars in by keeping them motivated.

3. Provide a structure for communications between you and your employees — make expectations clear.
4. Provides an outlet for encouragement to the employee who has been trying to perform well.

(Hansen, Dexter A)

Best of Both Worlds — The Performance and Development Appraisal

Part 1 of this basic form will get you thinking on how to best provide your employees with clear and realistic performance feedback and career expectations and to help plan development.

Part 2 of this basic form will help you construct a development plan in line with those career expectations communicated in Part 1, by addressing the key strengths and weaknesses that come out of Part 2.

Part 1a: Performance Appraisal

Employee Name:

Present Position:

Appraisal Period From:

Reviewer Name:

Overall Performance

The objectives of this section are to provide the employee with clear feedback about overall performance, to explain the key considerations that go into it and to assure that the employee's career expectations are in line with present performance. Employees shouldn't be surprised by these evaluations, as an attempt should be made to provide regular feedback on performance.

Check the box below which best summarizes the employee's overall performance against work expectations. Consider: how well work objectives are achieved, how the employee goes about achieving them, the difficulty of the work and what other results are being achieved above and beyond the job analysis.

Note: There are many ways to measure performance these are just a few examples, find measurements that work best for you.

The rating scale below includes three ranges of acceptable and one level of unacceptable performance:

Performance Against Work Expectations

0	1	2	3	4	5	6	7	8	9
not acceptable	partially achieving expectations			achieving expectations			exceeding expectations		

Performance Factors

Make a list of performance factors and their definitions to diagnose the jobs in your organization (see sample on page 16). Describe in detail how your employee goes about achieving the results of a job by diagnosing the importance and effectiveness of each factor.

1. Rate the **importance** of each factor to the employee's job by writing an "I" in the low-medium-high column. Use NA column if not applicable.
2. Rate the employee's overall **effectiveness** on it, based on typical level of performance during the review cycle, by writing an "E" in the column based on the rating scale of one to nine, one being low performance and nine being high performance. Use NA column if not acceptable.
3. Record **comments** in space provided to give specific examples.

Part 1b: Importance & Effectiveness Ratings Summary											
Performance Factor	n/a	1	2	3	4	5	6	7	8	9	
1. Quality Standards: Developing and/or maintaining acceptable standards for products and equipment.											
Ensuring that products/services meet reliability and quality standards established by the company and customers.											
Completing work according to specifications.											
Conducting evaluations to assure that equipment is in good operating order.											
Comments:											
2. Problem Solving: Applying knowledge to solve job related problems for timely corrective action.											
Identifying and anticipating potential problems for timely corrective action.											
Determining which problems require immediate attention.											
Assessing the strengths and weaknesses of solutions and developing effective action plans											
Comments:											
4.											
5.											
6.											

Part 2: Developmental Appraisal	
Strengths	Specific Recommendations For Better Utilizing Employee's Strengths
Weaknesses	Specific Recommendations For Improving Employee's Current Job Performance
Overall Comments	Employee Comments
<p><i>Include a disclaimer here covering privacy and intent of information.</i></p> <p>This appraisal has been reviewed and discussed with the employee:</p> <p>Employee: Date:</p> <p>Manager: Date:</p> <p><i>(Hansen 1984)</i></p>	

Top 10 Evaluation Appraisal Tips At A Glance

- Increase your employees' comfort level with performance appraisals
- Use examples, facts and accomplishments drawn from these ongoing records to present a factual, complete summary of employees' results
- Take full advantage of performance appraisals
- In addition to keeping your own records, encourage your employees to keep ongoing records
- Help employees achieve their full potential through recognition and encouragement
- Use objective (factual) wording so that you concentrate on observed behaviors rather than on personality traits or "attitude"
- Keep the performance appraisal focused on significant accomplishments
- Use benefit wording to reinforce desired behavior and motivate employees
- Use performance appraisals to summarize the year's performance and your discussions with your employees, not to introduce development areas for the first time
- Write action plans for development needs

(The Learning Center, Inc.)



Part Three of the Motivation Guide (Retention Guides for Skilled Trades Employers) refers to many successful programs that not only motivate, but can also be used in rewarding performance. See this guide for ideas on:

- Ideas on how to make your employees think like you
- Employee satisfaction programs
- Employee reward programs (including financial)
- Employee suggestion programs

surpassing your expectations, as defined in your appraisal. In the worst-case scenario, Progressive Discipline enables you to fairly, and with documentation, terminate employees who are ineffective and unwilling to improve.

Typical steps in a progressive discipline system may include these:

- Counsel the employee about performance and understanding of requirements.

Along with recognizing performance accomplishments, there may also be the need to overcome performance problems and satisfy job expectations.

- Training and development opportunities
- Teamwork building skills
- Health & Safety awareness

- Verbally reprimand the employee for poor performance.
- Provide a written verbal warning in the employee's file, in an effort to improve employee performance.
- Provide a number of days in which the employee is suspended from work.
- Consider terminating employment of an employee who refuses to improve.

(about.com)

When Appraisals Go Wrong — Progressive Discipline

Along with recognizing performance accomplishments, there may also be the need to overcome performance problems and satisfy job expectations. This is the idea behind Progressive Discipline. Not intended as a punishment for your employee, rather a way for you to assist the employee in meeting or

These are some of the challenges that can place employers in a progressive disciplinary position:

Absenteeism

Policies must be created and enforced.

Failure to follow a proper disciplinary procedure can leave you very vulnerable to claims from your employees.

Creating HR Policies

Make all policies and procedures available to all employees.

Personal Difficulties:

A wide range of problems can surface in an employee or team, affecting job performance — substance abuse, bad gambling habits, emotional distress, to name a few — that may require outside intervention or internal progressive discipline.

Morale Issues

Advancement of an employee deemed ‘wrong’ or unjustified by some may lead to resentment and

performance drop-off. Negative appraisals without justification, breach of confidentiality, defamation, etc., can also cause an employee to hinder company performance.

Compensation

In the everyday grind of working in the skilled trades, issues can come up around back pay, benefits, overtime, which if left unjustified, can create resentment or legal problems.

Company Property

Disregard for any aspect of company property, i.e. landscape, transportation, equipment, often results in disciplinary action being taken.

Failure to follow a proper disciplinary procedure can leave you very vulnerable to claims from your employees. The above problems require you develop the right procedures step-by-step from drafting the first letter, to coordinating disciplinary meetings, to hearing the appeal.

How Do You Measure Up? A Case Study In Performance

ADI Limited, a leading defence, engineering and systems contractor contributes success to the management of its people, with its emphasis on two way communication, training and empowerment through its Total

Process Management System and its Business Process Improvement System.

Although this contractor is a larger employer, with sales of \$717 million in 2001, the idea of putting systems in place with regards to communication and performance will work with any size business that employs full-time or part-time workers, unionized or non-unionized. 55% of ADI employees are production workers, 8% are management, 10% are involved in administration, quality systems and labour support and the remainder are technical staff.

Employee Empowerment

Employees at ADI are empowered to identify opportunities for improvement with two systems in place at the workplace: Total Process Management (TPM) and Business Process Improvement (BPI). These systems provide a structured approach for employees to describe problems, determine the likely causes, suggest improvements, present findings to management and prepare works submissions and monitor improvements. The methodology enables team members to map processes and identify waste in the form of breakdown, rework, scrap, waiting and queuing and operator intervention. Minimizing and diminishing waste results in enhanced safety, quality, and brings forth a sense of pride and

being valued — core values for any business regardless of size.

TPM, for example, empowers team members to focus on identifying and eliminating sources of equipment deterioration. This is in direct contrast to the traditional approach of allowing equipment to fail before repairing it. The ADI approach to TPM recognizes the importance of measuring and improving overall equipment effectiveness and the need to create a sense of ownership by plant and equipment operators, maintainers and support staff. Employees are also rewarded for their efforts in continuous improvement. Rewards may take many forms.

Communication

Two-way communication is very important at ADI. Management use a variety of mechanisms to ensure that information is both cascaded down to employees and that information is also projected back to management. These mechanisms include the use of: corporate and facility newsletters, regular meetings at all levels, career development discussions and plans and performance appraisals.

Training

ADI conducts a needs analysis each year to identify key competencies and resources critical to success of the business. Training needs are identified

through professional development processes, performance appraisals and objective setting processes. The on-going assessment of skills is a significant aspect of the continuous improvement strategy. To date, efforts at the shopfloor have concentrated on the development of Production Employees and Tradespersons.

Further, there has been a heavy emphasis placed on providing employees with skills to enable participation and decision making. Training and development activities over the past three years have focused on improving leadership skills and enabling employees to participate in the continuous improvement program by providing them with skills to be able to measure performance, map strategies, select best options for improvement and to evaluate outcomes.

These programs teach employees to: speak with facts and manage with facts; implement data collection systems and map skills, problem solve, project manage, identify safety risks, and encourage personal development. ADI recognizes that competitive advantage “is achieved through the commitment, contribution and creativity of (our) people”. They have fostered partnerships through the creation

of a workplace that emphasizes continuous improvement and innovation, empowering employees to be able to make decisions at the workplace and investing in its people. Its strong emphasis on training and developing its employees, as well as its extensive communication mechanisms reinforce this partnership approach.

Lessons That Translate To Your Business

Recognizing that competitive advantage “is achieved through the commitment, contribution and creativity of (your) people” goes a long way to improving your performance levels. By utilizing some of the basic principles and forms in this guide, you can create a workplace that emphasizes continuous improvement and innovation, empowering your employees to be able to make decisions at the workplace and giving it all for your business. A strong emphasis on training and development, as well as extensive communication with your employees through performance appraisals, reinforce the need for a performance-oriented approach with your employees.

(Industry Relations Victoria)

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For additional resources to help you with retention, please refer to the Skilled Trades Alliance’s Guides on Motivation and Teamwork for some more tools to help integrate and retain your employees.

For additional information about this booklet or other matters of recruitment and retention in skilled trades, contact:

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community led, community driven

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