

Summer 2010

New Q&A Style

Frontline Supervisor

MIIA
Employee
Assistance
Program

1.800.451.1834

Management Consultation

- Employee Performance
- Change Management
- Workplace Trauma
- Conflict Resolution
- Layoff Support
- Lunch & Learn Seminars
- Management Trainings
- Organizational Stress

Employee Services

- Confidential Counseling
 - * Addiction
 - * Anxiety
 - * Depression
 - * Family Issues
 - * Stress Management
 - * Work Concerns
- Resources & Referrals
 - * Legal
 - * Financial
 - * Child Care
 - * Elder Care



This Issue:

- * Documenting Employee Performance
- * How to Use Informal Documentation
- * The Importance of Timely Feedback
- * EAP Orientations
- * Training Opportunities

Documenting Employee Performance

Q. I have been documenting my employee's performance for a couple of months. I have kept the notes private because I may need them to prove that the employee is not suitable for the position. Is this okay?

A. There are two types of documentation supervisors use — informal and formal.

If you'll need to use those notes to prove that the employee is not suitable for the job, then **formally** documenting poor performance—which you will share with the employee—is a must. Formal documentation is an important tool for supervisors to use to indicate the problematic performance areas, the corrective measures implemented to remedy them, the employee's acknowledgement of your concerns, his/her reaction to them, and the plans and opportunities to improve work performance. Don't wait for an annual performance evaluation to use this method; employees must be given feedback frequently, along with opportunities to improve performance throughout the entire year.

Informal documentation (aka notes-to-self, daily log, journal) may also be a useful tool for recording initial behaviors that may later develop into a pattern of problematic performance (i.e. lateness, interpersonal conflicts, rudeness).

Until you decide to address those behaviors, the notes are for your eyes only. Keep them locked or located where only you have access to them. Check in with your human resources department to be sure you are following your organization's policies regarding both informal and formal documentation.

All documentation should be done for the betterment of your employees. Helping your employee change or improve is what's key.



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How to Use Informal Documentation

As discussed on page 1, informal documentation must be used correctly in order for it to be effective. Here are some thoughts on using it effectively:

Supervisors have many responsibilities to juggle in the course of a day. Over time, recalling details of an employee's performance can be difficult. Used correctly, notes-to-self or a weekly log are acceptable practices to record notable incidents that don't rise to the level of a formal write-up. Down the road, should you need a snapshot of an employee's performance, these notes will remind you of the **overall** performance, not only what most recently occurred. Developing this record-keeping habit, avoids the "recency error" - the tendency to allow one recent event to blur a supervisor's vision of the whole picture. This private journal (for your eyes only) is to be used as an informal management tool to help you discuss these events, if needed, at a later time. At the time you do discuss the examples to share during this discussion, which you then formally document (as described on page 1) for the employee's personnel file. Consulting your human resources department may be beneficial to ensure your compliance with organizational policies.

The Importance of Timely Feedback

Scheduling a regular (weekly or biweekly) individual supervision session with each employee is key to good leadership. Giving employees feedback in a timely manner—not just at annual performance evaluation time—allows him/her the chance to maintain good performance or improve poor performance all year long. Frequent communication builds morale and trust among work groups, which fosters a positive work environment overall.

For further assistance on developing these and other leadership skills, call your EAP.

Supervisor Trainings Available

- * Management 101
- * Timely Feedback and Performance Discussions
- * Managing the Troubled Employee
- * Negotiating Workplace Conflict
- * Effective Communication in the Workplace

Employee Orientation

When was the last time you had an EAP representative speak at your staff meeting? We've found that this important benefit requires frequent reminders that let employees know help and support is just a phone call away.

Invite us to your health/benefits fair. Schedule a 15-minute employee orientation at your next staff meeting. Let us come out and familiarize your staff with all that the EAP has to offer.

Have you Offered A Training Lately?

A training is a great way to address an issue with your whole department. Here are some of our most popular topics:

- * Drug and Alcohol Awareness
- * Don't Get Burned: Extinguishing Job Burnout Before it Extinguishes You
- * Preventing Workplace Harassment
- * Time Management: The Training I Don't Have Time For
- * Working in the Multigenerational Workplace