

BSBWOR301 Organise Personal Work Priorities and Development - Resource



**BSB30115 Certificate
III in Business**

TABLE OF CONTENTS

TABLE OF CONTENTS.....	2
COURSE INTRODUCTION.....	4
ABOUT THIS GUIDE	4
ABOUT ASSESSMENT	4
ELEMENTS AND PERFORMANCE CRITERIA	6
REQUIRED SKILLS AND KNOWLEDGE.....	8
REQUIRED SKILLS.....	8
REQUIRED KNOWLEDGE	8
EVIDENCE GUIDE.....	9
PRE-REQUISITES.....	10
TOPIC 1 - ORGANISE AND COMPLETE OWN WORK SCHEDULE	11
ENSURE THAT WORK GOALS, OBJECTIVES OR KPIS ARE UNDERSTOOD, NEGOTIATED AND AGREED IN ACCORDANCE WITH ORGANISATIONAL REQUIREMENTS.....	11
ASSESS AND PRIORITISE WORKLOAD TO ENSURE TASKS ARE COMPLETED WITHIN IDENTIFIED TIMEFRAMES 	12
IDENTIFY FACTORS AFFECTING THE ACHIEVEMENT OF WORK OBJECTIVES AND INCORPORATE CONTINGENCIES INTO WORK PLANS	15
USE BUSINESS TECHNOLOGY EFFICIENTLY AND EFFECTIVELY TO MANAGE AND MONITOR SCHEDULING AND COMPLETION OF TASKS	16
TOPIC 2 - MONITOR OWN WORK PERFORMANCE.....	18
ACCURATELY MONITOR AND ADJUST PERSONAL WORK PERFORMANCE THROUGH SELF-ASSESSMENT	18
ENSURE THAT FEEDBACK ON PERFORMANCE IS ACTIVELY SOUGHT AND EVALUATED FROM COLLEAGUES AND CLIENTS IN THE CONTEXT OF INDIVIDUAL AND GROUP REQUIREMENTS	21
ACCEPTING NEGATIVE FEEDBACK	22
METHODS OF FEEDBACK	23
ROUTINELY IDENTIFY AND REPORT ON VARIATIONS IN THE QUALITY OF PRODUCTS AND SERVICES ACCORDING TO ORGANISATIONAL REQUIREMENTS.....	25
IDENTIFY SIGNS OF STRESS AND EFFECTS ON PERSONAL WELLBEING.....	26
IDENTIFY SOURCES OF STRESS AND ACCESS APPROPRIATE SUPPORTS AND RESOLUTION STRATEGIES	37
WHAT IS STRESS?	39
STRESS WARNING SIGNS AND SYMPTOMS.....	40
HOW MUCH STRESS IS TOO MUCH?.....	41
DEALING WITH STRESS AND ITS SYMPTOMS.....	43
TOPIC 3 - COORDINATE PERSONAL SKILL DEVELOPMENT AND LEARNING	48
IDENTIFY PERSONAL LEARNING AND PROFESSIONAL DEVELOPMENT NEEDS AND SKILL GAPS USING SELF-ASSESSMENT AND ADVICE FROM COLLEAGUES AND CLIENTS IN RELATION TO ROLE AND ORGANISATIONAL REQUIREMENTS	48
WHAT SKILLS SHOULD I BE CHOOSING FOR MY PERSONAL DEVELOPMENT?	49
WHY SHOULD YOU CREATE A PERSONAL DEVELOPMENT PLAN?	49
WHY SHOULD I RECORD MY STRENGTHS AND WEAKNESSES?	50

HOW DO I KNOW WHAT THE REQUIRED SKILLS ARE?	52
IDENTIFY, PRIORITISE AND PLAN OPPORTUNITIES FOR UNDERTAKING PERSONAL SKILL DEVELOPMENT ACTIVITIES IN LIAISON WITH WORK GROUPS AND RELEVANT PERSONNEL.....	53
ACCESS, COMPLETE AND RECORD PROFESSIONAL DEVELOPMENT OPPORTUNITIES TO FACILITATE CONTINUOUS LEARNING AND CAREER DEVELOPMENT	55
INCORPORATE FORMAL AND INFORMAL FEEDBACK INTO REVIEW OF FURTHER LEARNING NEEDS	1
SUMMARY	58

COURSE INTRODUCTION

ABOUT THIS GUIDE

This learner guide covers one unit of competency that is part of the BSB30115 Certificate III in Business Package:

BSBWOR301B Organise personal work priorities and development

This unit describes the performance outcomes, skills and knowledge required to organise own work schedules, to monitor and obtain feedback on work performance, and to maintain required levels of competence. Operators may exercise discretion and judgement using appropriate theoretical knowledge of work scheduling and performance improvement to provide technical advice and support to a team

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts.

ABOUT ASSESSMENT

This guide contains a range of learning activities which support you in developing your competence. To apply this knowledge to your assessment you will be required to complete the assessment tools that are included in your program. The assessment is a competency based assessment, which has no pass or fail; you are either competent or not yet competent. This means that you still are in the process of understanding and acquiring the skills and knowledge required to be marked competent.

For valid and reliable assessment of this unit, a range of assessment methods will be used to assess practical skills and knowledge.

Your assessment may be conducted through a combination of the following methods:

- Third-party reports from a supervisor
- Practical demonstration of your skills in a classroom situation
- Projects and assignments
- Portfolio of evidence
- Written or verbal questioning to assess knowledge and understanding of business policies and procedures
- Oral presentation
- A combination of these methods

The assessment tool for this unit should be completed within the specified time period following the delivery of the unit. If you feel you are not yet ready for assessment, discuss this with your trainer.

To be successful in this unit you will need to be able to join you're learning to your work place, this should be achievable for those who are employed and for those who are not yet employed and you will be required to use observations of examples that can take place in a workplace environment.

ELEMENTS AND PERFORMANCE CRITERIA

1. Organise and complete own work schedule	1.1 Ensure that work goals, objectives or KPIs are understood, negotiated and agreed in accordance with organisational requirements
	1.2 Assess and prioritise workload to ensure tasks are completed within identified timeframes
	1.3 Identify factors affecting the achievement of work objectives and incorporate contingencies into work plans
	1.4 Use business technology efficiently and effectively to manage and monitor scheduling and completion of tasks
2. Monitor own work performance	2.1 Accurately monitor and adjust personal work performance through self-assessment to ensure achievement of tasks and compliance with legislation and work processes or KPIs
	2.2 Ensure that feedback on performance is actively sought and evaluated from colleagues and clients in the context of individual and group requirements
	2.3 Routinely identify and report on variations in the quality of products and services according to organisational requirements
	2.4 Identify signs of stress and effects on personal wellbeing
	2.5 Identify sources of stress and access appropriate supports and resolution strategies

3. Coordinate personal skill development and learning

3.1 Identify personal learning and professional development needs and skill gaps using self-assessment and advice from colleagues and clients in relation to role and organisational requirements

3.2 Identify, prioritise and plan opportunities for undertaking personal skill development activities in liaison with work groups and relevant personnel

3.3 Access, complete and record professional development opportunities to facilitate continuous learning and career development

3.4 Incorporate formal and informal feedback into review of further learning needs

REQUIRED SKILLS AND KNOWLEDGE

REQUIRED SKILLS

- Communication skills to give and receive constructive feedback relating to development needs
- Literacy skills to read and understand the organisation's procedures
- Planning skills to organise work priorities according to work goals and objectives
- Problem-solving skills to solve routine problems
- Self-management skills to:
 - Comply with policies and procedures
 - Consistently evaluate and monitor own performance
 - Seek learning opportunities

REQUIRED KNOWLEDGE

- Key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
 - Anti-discrimination legislation
 - Ethical principles
 - Codes of practice
 - Privacy laws
 - Occupational health and safety (OHS)
- Organisational policies, plans and procedures
- Methods to elicit, analyse and interpret feedback
- Principles and techniques of goal setting, measuring performance, time management and personal assessment
- Competency standards and how to interpret them in relation to self
- Methods to identify and prioritise personal learning needs

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- Preparing work plans
- Scheduling and prioritising work objectives and tasks
- Knowledge of the principles and techniques of goal setting, measuring performance, time management and personal assessment.

Context of and specific resources for assessment

Assessment must ensure:

- Access to an actual workplace or simulated environment
- Access to office equipment and resources
- Examples of work schedules and performance improvement plans

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- Direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- Review of self-assessment documentation outlining learning and development needs
- Analysis of responses to case studies and scenarios
- Demonstration of techniques
- Oral or written questioning to assess knowledge of methods to identify and prioritise personal learning needs
- Evaluation of planning for personal skill development activities and professional development opportunities

Guidance information for assessment

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended

PRE-REQUISITES

This unit must be assessed after the following prerequisite unit:

There are no pre-requisites for this unit.

TOPIC 1 - ORGANISE AND COMPLETE OWN WORK SCHEDULE

ENSURE THAT WORK GOALS, OBJECTIVES OR KPIS ARE UNDERSTOOD, NEGOTIATED AND AGREED IN ACCORDANCE WITH ORGANISATIONAL REQUIREMENTS

Business objectives are usually quite strategic and high-level and set out what the organisation wants to do, today, tomorrow, next month, next year. They are broad ideas that allow the business to respond to dynamic situations and continue to grow and prosper. What has that got to do with you? In order for an individual in an organisation to understand the objectives and help each person appreciate their individual part in achieving them, they must be clearly set out and applied to each department. Each organisation will have its own policies and procedures to allow the broad brushstrokes of decisions made by the CEO and/or the Board passed on to managers, middle managers and supervisors. It is their role to explain your part in achieving part of all of any objectives. The company who sets D.U.M.B. objectives – Doable, Understandable, Manageable, and Beneficial should not have any difficulty explaining the outcomes they desire to anyone in the business from staff to Board member.

Work goals or outcomes are specific strategies to help you personally achieve targets or Key Performance Indicators (KPI's) in your role in the workplace and by achieving them add to the success of any business objectives. Goals typically provide you with instructions on how to go about achieving them i.e. improve 'x', do 'y', reduce 'z'. Goals are priorities. They are actually things almost everyone in the company will understand as soon as you say them.

Understanding your KPI's will help you to manage your time well. If the business objective is to sell as much stock as possible, your KPI will very likely involve an expected number of sales or transactions that must be met in a certain timeframe. Some are daily, weekly, monthly or seasonal. There are 4 components to any KPI.

1. What is being measured?
2. Who is measuring it?
3. How often is it being measured?
4. How frequently is that information being transmitted to the relevant supervisor/manager?

Position Descriptions (PD) are often a good place to start when trying to understand where we fit into our organisation. The PD will identify your accountabilities and

responsibilities to help you plan your work and attain the goals set out in your KPIs. Whilst your KPI's tell you the level of performance required or state the amount of outcomes to be achieved, the PD sets out the responsibilities, skills and attributes required to achieve the KPI's.



Self-Test 1.1

What are the components of any KPI?

- ☐ What is being measured?
- ☐ Who is measuring it?
- ☐ How often is it being measured?
- ☐ How frequently is that information being transmitted to the relevant supervisor/manager?
- ☐ All the above

Self-Test 1.2

A position description will identify your accountabilities and responsibilities to help you plan your work and attain the goals set out in your KPIs.

- ☐ True
- ☐ False

ASSESS AND PRIORITISE WORKLOAD TO ENSURE TASKS ARE COMPLETED WITHIN IDENTIFIED TIMEFRAMES

Good time management results in tasks being completed on time. Tasks are inter-related within projects, so your colleagues may not be able to start or complete their tasks until you have completed yours. Your colleagues therefore rely on you to complete

tasks on time or to give them sufficient warning if a deadline is at risk of not being met. This will enable them to plan their own workload accordingly. Tasks are negotiated so the best person is allocated to each task to speed up completion times; everybody supports each other so all work is completed on time.

In assessing and prioritising your workload, you increase your ability to reach KPI's, contribute to the smooth running of your part of the business and reduce stress on yourself by not leaving everything to the last minute. If you are working with others it is important to communicate clearly to enable each person to be fully aware of what they are required to do so tasks are not replicated, therefore saving time and resources.

At times you may need to seek assistance from supervisors or colleagues to ensure your work is completed within timelines required. It is important to acknowledge when a task is beyond your current capability as this enables work to be handed over to someone with greater expertise. In a good team, they will be happy to show you what to do and may even become a mentor to you, allowing you to learn in a positive and supportive environment which will make you a more valuable member of the team.

Assessing the workflow depends on your ability to manage time effectively and understand the various roles each team member plays. Good negotiation skills allow you to hold a mutual discussion involving the completion of tasks, including who should be responsible for what task and how the task should be completed. Good communication will ensure everyone fully understands what is expected of them and gives employees the opportunity to ask questions for clarification of tasks. Be prepared to continually monitor and re-estimate timelines if need be.

When you have a range of competing demands on your time, you may find that you try to complete more than one task at a time. However, this may result in all of the tasks being done to a lower quality than you would have achieved otherwise. Prioritising is the ordering of tasks from most important/urgent to least important/urgent. You can prioritise work according to a number of different measures.

At the very least you should regularly generate To Do lists – daily, weekly and monthly versions. You could then prioritise the items in each list with categories – e.g. label high priority tasks that need to be done immediately with an A, those that need to be done by a particular time with a B, those that worthwhile doing but that don't need to be done now or that could be delegated as a C while those that could be left be delegated as a D. This labelling will allow you to more easily plan to meet your KPI's.

Stephen Covey (who wrote 'The Seven Habits of Highly Efficient People') came up with the diagram on the left to help you determine a task's importance. Obviously, those tasks that you list in the top left cell need to be done immediately while those in the 4th quadrant at the lower right can be left out completely. This focus on weighing both importance and urgency can be a valuable way of determining your priorities.



In every work environment you will need to cope with changes and interruptions. Your prioritising and time allocation to these priorities will need to allow for these contingencies. Consult your workmates, work as a team and maintain your awareness that you need to be flexible so that you don't get too stressed and lose sight of your goals that need to be met.

Self-Test 1.3

Fill the gaps with words from the list below:

Completed, time

Good _____ management results in tasks being _____ on time.

Self-Test 1.4

Fill the gaps with words from the list below:

Reduce, increase, contribute

In assessing and prioritising your workload, you _____ your ability to reach KPI's, _____ to the smooth running of your part of the business and _____ stress on yourself by not leaving everything to the last minute.

IDENTIFY FACTORS AFFECTING THE ACHIEVEMENT OF WORK OBJECTIVES AND INCORPORATE CONTINGENCIES INTO WORK PLANS

As much as we try to plan for every eventuality, there are always some events that arise which are unexpected, unplanned and can, if not handled correctly, take up valuable time to correct and put us behind schedule.

- Competing work demands can be prioritised more easily when you are well aware of your Position Description. This will allow you to decide what is important and what is not. Learning to say “no” to tasks that are not part of your job or which can be done later, with professionalism and good manners is a vital skill in the workplace. Phone calls and emails can be a distraction and consume a considerable period of time which can make you feel busy but achieves very little. Some organisations have implemented a set time in the day to deal with emails and have a policy that each email must have an outcome – that is – an action must come from reading each one. A ‘to-do’ list is invaluable. List the projects in order of importance. Remember that there are certain times of day when you probably do your best work. Some people work best in the morning and others late at night. Schedule your email check-in during your less-productive times – and save your peak hours for doing creative, high-value work. It is essential that you learn to delegate effectively. This can improve morale of your staff and reduce your workload. However, you need to be aware of the capabilities of your staff and understand their current workload.
- Environmental factors such as workplace hazards and risks and knowing how to deal with them are part of your job. They may contribute to slowing down or stopping you from achieving a goal on time simply by you not taking the time when you are free to find out how to remove jammed paper from a photocopier or knowing where spare cartridges are. This basic knowledge may help you avoid overshooting deadlines.
- Budget and resource restraints – this might involve unexpected cutbacks in budget, colleagues being moved to other areas to work on other projects, incomplete deliveries of supplies to allow you to complete a task. Being flexible and open to other opinions, seeking the advice of colleagues who have been in the organisation longer than you, and brainstorming all allow you to search for the most efficient way of achieving your goal without exceeding your budget.
- Technology makes life in the workplace much easier but when it doesn’t work because of equipment breakdowns, paper jams, network issues, corrupted files, or power outages it’s important to have a back-up plan so that time is not wasted waiting for IT technicians or tradespeople to arrive. Once the solution leaves your area, control of the timeframe is lessened so it is important to have plans to use the waiting time constructively. Having files you are working on backed up to a USB drive, using the time to do some research on the project you are working on, bringing a meeting of your work group forward all help to keep your focus on the work targets and keep your

and your team on track. If any equipment is broken or needs to be moved, it is important to follow workplace WHS policies and procedures regarding lifting or dealing with any potential hazardous materials.

- Contingency Plans - sometimes referred to as Plan B. Unforeseen events can and do happen which may result in flustered staff as deadlines get pushed out and resources promised are no longer available. In some companies a fire drill is a scheduled event which can be planned for but in others the drill is unannounced to staff to simulate more closely what happens in a real emergency. This can take some time to complete and will affect deadlines. Look for opportunities to reduce risk, wherever possible. This may help you reduce, or even eliminate, the need for full contingency plans in certain areas. Contingency planning is ignored in many companies. Day-to-day operations are demanding and the probability of a significant business disruption is small, so it's hard to make time to prepare a good plan. However, if you're proactive in the short term, you'll help ensure a quicker and more effective recovery from an operational setback in the long term, and you may save your organization from failure in the event that risks materialize. Contingency planning requires an investment of time and resources, but if you fail to do it – or if you do it poorly – the costs could be significant if a breakdowns or delays happen.

Self-Test 1.5

What factors limit or restrict the completion of work?

- ☐ Competing work demands
- ☐ Environmental factors
- ☐ Budget a resource restraints
- ☐ Technology breakdowns
- ☐ All the above

USE BUSINESS TECHNOLOGY EFFICIENTLY AND EFFECTIVELY TO MANAGE AND MONITOR SCHEDULING AND COMPLETION OF TASKS

There are many work schedule templates available on the internet from personal To-do lists to Rostering software and Project Management programs which can be shared by all relevant staff members. In some cases it can also be accessed by third parties such as contractors and vendors.



For your personal day to day organisation including work tasks, a hard copy diary may be a requirement in your workplace. Other organisations expect you to use Microsoft Calendar to help you organise your work day and have a policy of sharing calendars in work groups to monitor staff movements and allow training time to be scheduled. Electronic Calendars that can be accessed by your colleagues will enable them to identify the gaps in your schedule in which they can organise meetings or discussions. Such devices can also record how you've spent your time, jog your memory, alert you to meetings and important tasks, and store useful information such as to-do lists and contact details. They can also be accessed on smart phones, tablets and laptops so that you can keep track of your daily meetings, tasks and future planning even when you are not near a stand-alone computer or in your office.

Project management tools are used to monitor various projects or tasks at regular intervals and there are a few which are commonly used in the workplace such as Gantt charts, Pert charts, Excel spread sheets, MS Project (which can incorporate Gantt Charts), and written reports. In the case of reports, your workplace will most likely have templates or you may be able to view one which has previously been used to determine the format to use for reporting and the depth of information you need to provide.

A critical part of maximising the benefits of this technology is to have staff with technical skills and regular training to support these skills.

Self-Test 1.6

Diaries can assist you to manage and monitor scheduling in the workplace.

- ☐ True
- ☐ False

TOPIC 2 - MONITOR OWN WORK PERFORMANCE

ACCURATELY MONITOR AND ADJUST PERSONAL WORK PERFORMANCE THROUGH SELF-ASSESSMENT

We'll assume that you have utilised a system to schedule your work and you've identified work objectives and priorities. We'll also assume that you've scheduled your time and you have contingency plans to deal with a range of potential problems. You have done everything that is reasonable to achieve your KPI's and contribute to your organisation's success. While that is the professional way to approach your job, the chances of change to schedules and work practices, demands of clients – whether internal clients from other departments or external clients – means that you need to constantly monitor your performance. Self-assessment can give you information that will hopefully lead to:

- Performance improvement
- Identification of problems outside your control
- Greater job satisfaction
- Identification of training needs
- An improvement in salary/career prospects

The benefits are two sided. Self-assessment benefits you and your employers because you will be using your skills more fully. Your job satisfaction will increase and it may well improve your salary and career prospects. Your employer benefits by taking on someone who is willing to review their own work, their contribution to their immediate team and by having a more satisfied person in the workplace.

The most common way to measure your achievement of KPI's is to monitor your performance by first considering a range of methods – so you can then choose the method that's easiest to apply and is the most effective in your workplace. Some organisations will have a set of self-assessment tools for you to use. The easiest way to start assessing your performance is to monitor performance against quantifiable objectives. Here are some examples:

- Sales reports
- Deadlines met
- Error reports
- Accuracy reports
- Documents
- Proposals
- Plans
- Budget forecasts

These tend to be the monitoring methods most managers are comfortable with because they're about what the employee does. It's easy to see if your employee is achieving a sales target or submitting accurate work and these are great monitoring methods for the quantity, quality and time elements of the job.

Being successful in the workplace does not entail achieving your goals and targets at any cost. It is important to note that your organisation will not only have its own rules, regulations, policies and procedures to abide by. State and Federal government legislation also impacts on the workplace, most specifically in the area of Occupational Health and Safety. This is now known as Workplace Health and Safety or WHS. The State Departments responsible for WHS in most states have comprehensive websites focussing on various industries, the potential risks inherent in working in them and lots of information on how to eliminate or reduce hazards and control risks. An example of the webpage explaining the risks in the Storage and Warehousing area is <http://www.worksafe.vic.gov.au/safety-and-prevention/your-industry/storage-and-warehousing>.

[Back to Your Industry](#)

Storage And Warehousing
[About The Industry](#)
[Your Legal Duties](#)
[How To Comply](#)
[Hazardous manual handling in grocery wholesale](#)

Storage And Warehousing

Did you know workers in warehousing have a higher than average chance of being seriously injured at work?

Almost 70% of these injuries are caused by hazardous manual handling and slips, trips and falls.

In your industry alone, by the end of September, more than \$3 million had been paid on workplace injury claims made in 2010-11. Overall, the average total claims cost is estimated to be \$57,000 per claim.

You will find information on how to identify hazards and control risks on this page. Other guidance that may help you includes:

- [A guide to manual order picking](#)
- [A guide to handling large, bulky or awkward items](#)
- [Unpacking shipping containers](#)
- [Safe operation of cold storage facilities](#)

You may also find the following information helpful:

- [Maintenance and repair](#) - controlling risks during maintenance and repair, including guidance, checklists and sticker templates
- [Slips, trips and falls](#) - includes a comprehensive checklist to help you control the risks associated with slips, trips and falls

Further information: If you have any questions or need further advice, [contact the WorkSafe advisory service](#).

Your health and safety guide to
Storage and Warehousing

About the industry	Your legal duties	How to comply
About the industry What are the risks? Preventing injury	Your legal duties Employers Employees Compliance and enforcement	How to comply Consult Find Fix

You have a general duty to take reasonable care for your own health and safety, and that of others who may be affected by your work, and to cooperate with your employer's efforts to make the workplace safe. This may include:

- Following workplace policies and procedures
- Attending health and safety training
- Helping to identify hazards and risks

These should and probably will be included in your Position Description and you may find that attending a prescribed amount of safety training and/or contributing to an accident free workplace is part of your KPIs. There are many common solutions for controlling hazards and risks in the workplace, which can be readily implemented.

There will be policies and procedures to guide you in the use of hazardous materials, using equipment safely and keeping up to date with WHS knowledge via sites like WorkSafe will provide you with a range of guidance material, including Codes of Practice, Guidance notes and Alerts on specific hazards and OHS issues which provide solutions and advise on the required processes and actions that duty-holders should take in order to meet their legal obligations.

It's in both your interests as well as your organisation's interest that you develop the techniques and attitudes that allow you to monitor and evaluate your own work and time scheduling.

Self-Test 2.1

Self-assessment can give you information that can lead to what?

- ☐ Performance improvement
- ☐ Identification of problems outside your control
- ☐ Greater job satisfaction
- ☐ Identification of training needs
- ☐ An improvement in salary/career prospects
- ☐ All the above

Self-Test 2.2

The easiest way to start assessing your performance is to monitor performance against quantifiable objectives such as: deadlines met, error reports, accuracy reports, budget forecasts.

- ☐ True
- ☐ False

ENSURE THAT FEEDBACK ON PERFORMANCE IS ACTIVELY SOUGHT AND EVALUATED FROM COLLEAGUES AND CLIENTS IN THE CONTEXT OF INDIVIDUAL AND GROUP REQUIREMENTS

Many people dread performance review meetings thinking that their boss is going to tell you what he really thinks of you, and we nearly always assume it's not going to be praise! Others see it as a thankless task that the HR department requires, before they'll sign-off on yearly raises. Or could it be an exercise in cutting and pasting comments from a bunch of old reviews to make some "new" ones?

How people perform is critical to an organization's success. Yet we often fail to monitor their progress on a regular basis. Imagine what would happen if you only occasionally looked at your bank balance and just assumed that funds would be there when you needed them; or if you trusted that your machines would keep working, without any routine maintenance.

Seeking feedback from your colleagues and clients gives you a regular opportunity to find out how you can perform better individually, eliminate problems that you might not otherwise have been told about and further your own career goals by being able to improve your performance and exceed expectations of your supervisors.

Managers and supervisors conduct regular performance appraisals to ensure you are meeting your KPI's, and sometimes teams are appraised as well. Using the same approach, you can invite constructive feedback from those around you as well as clients or customers to monitor yourself and your team. Conducting regular performance appraisals helps you:

- Detect and eliminate barriers to effective performance
- Pick up dissatisfactions that would otherwise lead people to leave
- Focus people's efforts in the right direction
- Motivate people to work towards important goals
- Help them develop skills and competencies necessary to achieve future objectives
- Celebrate their successes

WHY IS FEEDBACK IMPORTANT

It is important that your work performance is monitored and that you receive feedback which is constructive and encourages you to strive for improvement.

Types of feedback can be:

- Positive feedback – indicates that tasks were carried out well. It acknowledges personal efforts and the good cooperation among team members. It encourages all members to continue to strive for excellence.
- Negative Feedback – Informs team members that tasks were not completed well. It analyses the reason for the problems encountered and proposed ideas for improvement.
- Constructive feedback – encourages and acknowledges good job performance. It also suggests areas for improvement and strategies for achieving this improvement.

Hardly anyone likes asking for comments on their work but the process is critical to career development and good results.

It is important to accept feedback from others so that you can learn and improve from your mistakes. This way, in the future, you can do a much better job.

Getting feedback from your manager will also help you see yourself from the perspective of others, to see ourselves as other see us. We can learn a great deal from feedback. You should encourage your manager to give you feedback so that you know what tasks you are doing really well and what task you are not so great at doing.



ACCEPTING NEGATIVE FEEDBACK

What is negative feedback? It's a little like letting the genie out of the bottle and then finding you can't put it back. However, accepting negative feedback gracefully and gratefully is a skill of great leadership. Remember, though, other people may not know how to give negative feedback diplomatically, like you have. So take a deep breath and swallow your pride. Reacting with an attitude that reflects a willingness to learn will usually make the process easier for both yourself and your manager.

You may find these guidelines useful when receiving negative feedback.

- Listen without interruption – you may learn something of real value
- If you hear something you don't agree with, simply say, "That's interesting!" and discuss it at the end
- Ask questions to clarify what exactly went wrong; what you did or didn't do
- Acknowledge what is true, but don't necessarily change your position – you may have good reason for your action, ask for time to think and then get back to the person

Can feedback really help to improve working relationships and productivity? Remember, feedback doesn't always have to be negative. Start by looking for occasions when you can get positive feedback and remember to plan carefully for the occasions when you have to get negative feedback. Try some of the ideas above and see what happens.

WHO GIVES FEEDBACK?

There are many different people in your organisations that you can get feedback from and that feedback can be positive and negative - it is how you choose to accept and learn from them that is important.



Feedback may be given by:

- Your supervisor or manager
- Other management staff
- Team leader
- Team member
- Clients and/or customers
- YOU of course

METHODS OF FEEDBACK

Feedback on performance may be formal or informal.

- Formal performance appraisals generally occur on a regular basis. The first appraisal usually takes place three months after an employee starts a job then every six or twelve months thereafter. These appraisals allow for formal method of feedback which can lead to modification of a job description, further training and re-evaluation of performance.
- Feedback from supervisor and colleagues. This is mainly in the form of informal comments on a job well done or suggestions of how to complete a task
- Feedback from customers giving positive comment and praise for good customer service
- Personal reflection. This involves thinking about what you have done and how you can improve on it next time
- Routine organisational methods for monitoring service. These include customer's complaints or satisfaction form, and surveys that are completed at the end of a task or a job for a customer

Feedback is valuable to a workplace as it can:

- Improve business relationships
- Identify and overcome existing problems
- Eliminate entrenched work practices
- Improve productivity
- Enhance output quality
- Contribute to the future development of the workplace

When feedback is given it is best to use the following acronym **S.W.O**,

- **S**trength – Praising on the good work completed
- **W**eakness – Letting them know where improvement is needed
- **O**ptions – Discussing the options on how to improve in the set areas

Self-Test 2.3

Seeking feedback from your colleagues and clients gives you a regular opportunity to find out how you can perform better individually, eliminate problems that you might not otherwise have been told about and further your own career goals by being able to improve your performance and exceed expectations of your supervisors.

- ☐ True
- ☐ False

Self-Test 2.4

Fill the gaps with words from the list below:

Improve, accept, learn

It is important to _____ feedback from others, so that you can _____ and _____ from your mistakes, this way in the future you can do a much better job.

Self-Test 2.5

Feedback is valuable to a workplace as it can:

- ☐ Improve business relationships
- ☐ Identify and overcome existing problems
- ☐ Eliminate entrenched work practices
- ☐ Improve productivity
- ☐ Enhance output quality
- ☐ Contribute to the future development of the workplace
- ☐ All the above

ROUTINELY IDENTIFY AND REPORT ON VARIATIONS IN THE QUALITY OF PRODUCTS AND SERVICES ACCORDING TO ORGANISATIONAL REQUIREMENTS

Quality control and quality assurance are critical factors in many workplaces. Quality can focus on the goods being handled and the state they must be stored in - refrigerated goods, for example, must be stored at certain temperatures. Printing and photocopier paper must be stored in a humidity free area so that it doesn't absorb any moisture in the air and thereby cause paper jams. Other items must be kept dust free – computers and associated accessories for example.

Some workplaces employ a quality control officer who is responsible for recording issues on a monitoring sheet or software program. They will decide what action is to be taken (e.g. stock disposed of) and what further action may follow to eliminate stock spoilage or equipment damage in the future. Actions may include:

- Investigating the contamination/damage source
- Possible counselling or re-training if poor work practices are a contributing factor
- Possible penalties (e.g. Loss of weekly bonus) or even dismissal for persistent or serious failure to do the job correctly



The monitoring sheets are usually kept in the quality assurance manager's office. If part of your role is to check the quality of your team's work, it very likely they will feature in your KPI's to reflect the importance of this facet of your job.

Variation in quality is a fairly normal part of any production process. It is the degree and type of variation that is critical. The bottom line is what degree of variation will affect the performance of the product for the purchaser. Causes of the variation need to be identified, quantified and monitored. These causes of variations can be broken in to two groups. The first is called Common Cause Variation. These are variations that are normal for the processes being used and the only way to fix them is to change the production processes. These make up the largest proportion of variations for most organisations. E.g. normal variations in the quality of raw materials or the operating tolerances of the machinery being used.

Special Cause Variations are those that aren't normal to the process i.e. they aren't expected. For example, the effects of an untrained worker, the impact of a new supplier's materials and maintenance delays or impacts from faulty operation of equipment. These variations must be identified and plans put in to place to eliminate or reduce them.

High quality product produced with maximum efficiency should be the goal of all workplaces. Monitoring and managing variations in quality is a critical part of this.

Self-Test 2.6

Fill the gaps with words from the list below:

Customer, assurance, stored, control, stock

Quality _____ and quality _____ are critical factors in many workplaces. Quality focuses on the _____ being handled and the state it must be _____ in. It also focuses on the quality of _____ service in the workplace.

IDENTIFY SIGNS OF STRESS AND EFFECTS ON PERSONAL WELLBEING

Stress is a state of mental or emotional strain. It is critical for you to understand the impact of stress on your work life balance and put in place steps to manage that stress. This should be a key part of your personal development plan.

There are 4 stages of stress that you may go through:

- In the first stage, you may find yourself overworked and reluctant to take time off work to recharge and reenergise
- In the second stage, you may find yourself unduly tired, irritable and feeling like you are under achieving. You may also be skipping meals and generally not taking the best care of yourself or your relationships
- In the third stage, you may feel resentful or guilty, you do not get as much enjoyment out of spending time with family and friends and you may not be enjoying work at all
- Finally, you may withdraw completely, succumb to illness, feel like you have failed in some way and you may even break down both emotionally and physically

If you don't address the causes, stress can lead to mental health problems including family and work problems and the presence of physical illness or health concerns. In turn, these health problems can lead to medical complications. Of particular concern is the possibility of suffering heart disease which is a leading cause of death and disability in Australia.

If you work with a colleague who is displaying any of these symptoms, be willing to offer genuine support and concern. Try to listen to them without jumping in with a solution. Sometimes, the stressed individual needs to get concerns off their chest and once achieved, can often see the solutions firsthand. It is important to keep the person

focusing on today, to live one day at a time and emphasise that a better day today will make tomorrow easier to handle. Take life in bite-sized chunks and keep the positives ahead of the negatives.

An Employee Assistance Program (EAP) is a free and confidential counselling service offered by employers to their employees to support their well-being in the workplace and in their personal lives. Depending on the employer's arrangement, EAP may also extend to immediate family members. Most services offer initial support and assistance to individuals and groups of employees who have personal and/or work related issues that may impact on their well-being, work performance, safety, individual and workplace morale and psychological health.

Activity 2.1

Visit <http://www.eapaa.org.au/> and use the link at the bottom of the page to investigate EAP options for your particular state.

EAP counselling is aimed at assisting employees to:

- Understand and clarify issues that are directly concerning them, including any underlying issues
- Identify and explore options to address those issues
- Develop plans to approach the issues and find constructive solutions



Events and issues which may give rise to requests for EAP services include work issues such as:

- Problems with performance
- Relationships between co-workers
- Bullying and harassment
- Managing conflict and anger management
- Adjusting to change in the workplace
- Career change
- Managing work related stress

Looking at those dot points in more detail - a simple definition of unsatisfactory job performance is the gap between the employee's actual performance and the level of performance required by the organisation. This can be caused by several things:

1. Unsatisfactory work content — in terms of quantity or quality for example

2. Breaches of work practices, procedures and rules — such as breaching occupational health and safety requirements, excessive absenteeism, theft, harassment of other employees, etc. And
3. Employees' personal problems — usually 'off-the-job' issues that affect their performance at work

The performance management process should be able to identify these problems. The performance management review and feedback processes can provide a forum to discuss the problems, to diagnose the causes and explore possible remedies such as job redesign, training or counselling. During the performance review managers would consider the following standard questions:

- What actually is the performance 'gap'?
- How large is the gap?
- Is it increasing?
- What are the consequences of that gap?
- How serious are they?
- Has the employee's performance been acceptable in the past?
- Does the employee have the skills required to perform the job?
- If not, is he/she capable of obtaining and using the skills?
- In general, is the employee capable of performing the job?
- How important to the employee is performing the job well?
- Does the employee benefit in some way from unsatisfactory performance (e.g. trying to prove a point, having a hidden agenda, undermining someone else, trying to orchestrate a payout or redundancy, etc.)?
- Are there any barriers to performance within the employee's control?
- Are there barriers within the organisation's control (such as resources issues, communication problems, recruitment, training, job descriptions, etc.)?
- What is required to remove these barriers?
- Is it feasible to do it?

It is important to distinguish between factors that are 'employee issues' and those that are 'organisation issues'. Many situations have elements of both, with one causing or contributing to the other. There may be a tendency for both parties to allocate blame either to each other or to third parties, but if the true causes are not diagnosed and treated, the problems will be repeated.

If the issue lies in the area of relationships with co-workers it's vital that the manager discusses any problems such as personality clashes, 'groupthink' – which is a psychological phenomenon that occurs within a group of people, in which the desire for harmony or conformity in the group results in an incorrect or deviant decision-making outcomes, harassment, conflict between job requirements and cultural values, work hoarding (for example to exert control over others or to 'look busy' because there is a fear of redundancies), poor management of the work group. There is a wide variety of potential problems and causes, both individual and group-related.

Strategies to assist you if you are having personal issues in the workplace with your peers include arranging transfers (to remove clashes), redesigning jobs (to eliminate parts that conflict with cultural values), counselling, teambuilding strategies, and performance management of the manager/supervisor/group leader. If the issue(s) are not resolved it may lead to our second point, bullying or harassment.

Sometimes the work environment can cause stress – inadequate resources and equipment, poor working conditions, occupational health and safety issues. Feedback from employees should alert management to fix the problems as should data from job analysis, OHS audits and inspections, etc. That is why it's important that you report faults to your OHS Rep, your supervisor and participate in safety drills as well as contribute in team meetings. Often you might think you are the only person feeling a certain way or noticing something wrong, but it might simply be a case of no one wanting to be the first person to speak up.

By bringing issues to the attention of the correct person in the chain of command, you contribute to a safer workplace and reduce stress levels not only for yourself but for your team and perhaps your department.

Don't assume that existing procedures which cause workflow issues such as bottlenecks, shortcuts, breaches of rules and regulations, management and supervision issues, or errors that are not corrected cannot be changed. Feedback from those who are 'at the coal-face' and working with equipment and procedures every day have much to contribute to safety meetings and team meetings where suggestions to improve processes can be suggested.

Other stresses in the workplace can be due to insufficient remuneration, whether real or perceived, excessive workloads/working hours and work/life balance issues.

Again, feedback from employees will identify these problems. Reviews of remuneration and work/life balance policies and practices should occur during the performance review. If sufficient feedback from employees on the same topic is received it may prompt a review of business performance and activities which may show that business is expanding, and justify increasing staffing levels. Strategies to assist you could involve job redesign, work study/training, reviewing and enforcing existing rules/procedures, and performance management of managers/supervisors.

Managing conflict and anger management - workplace conflict can broadly be considered to fit into two categories, the first being "when people's ideas, decisions or actions relating directly to the job are in opposition," and the second being a situation "when two people just don't get along." which is often referred to as a "clash" of personalities. This last point can be the most difficult to address because strong emotions get mobilised based on negative perceptions about another person.

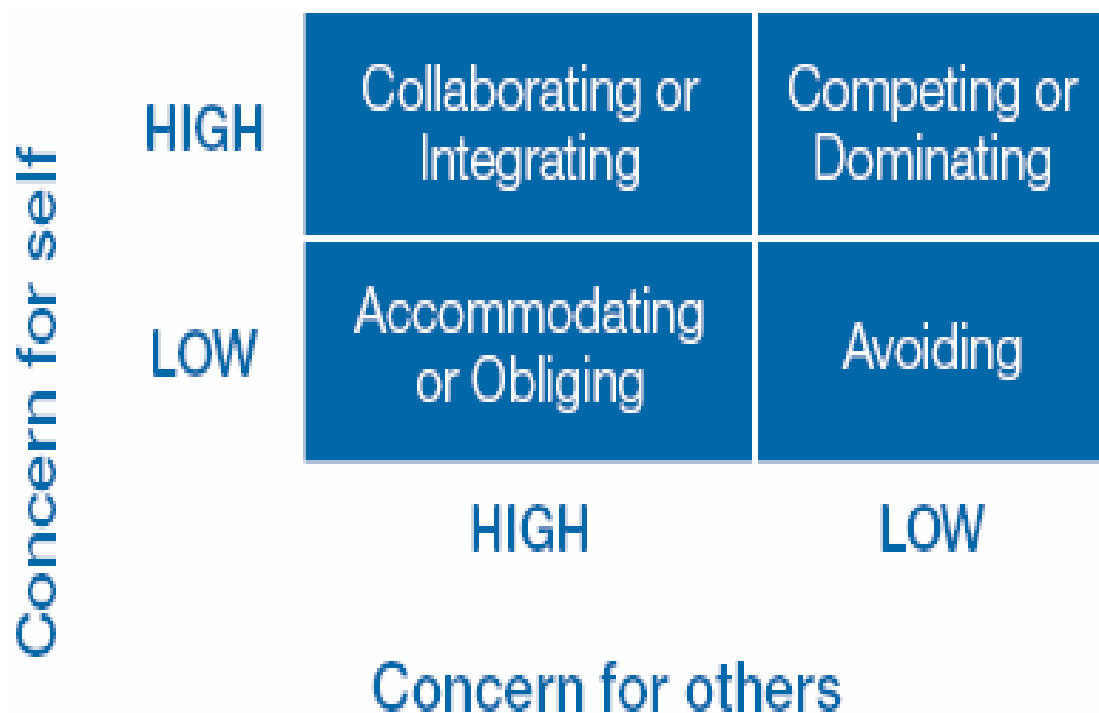


Clashes in the workplace can occur over who does what. These demarcation issues are usually where employees aren't clear about what to do in their role. These problems become more apparent after organisational restructures and after managers are replaced. Some of the ways to clarify these issues include updating job descriptions, job redesign and teambuilding training.

When a personalised conflict is identified, it's important to redirect attention and energy into specific issues relevant to the job that can be worked through and to set clear expectations on acceptable behaviours and consequences for inappropriate behaviours. The earlier this is done, the more likely that a positive outcome will be achieved as personalised conflicts tend to get worse over time as each person looks for problems in the other and finds reasons to back up their negative perceptions.

Alliances can develop in teams in support of one or other of the people in conflict which can lead to significant disruption in the workplace. There are always emotions involved in conflict and these build in intensity and complexity the longer a conflict remains unresolved. People have different styles in how they respond to conflict and their styles can vary depending on their level of emotional investment in the issue at hand or their power relationship with the other party to the conflict. The different conflict styles are commonly defined as incorporating concern for self and concern for others in varying degrees. These two variables are used in the following model that gives us an insight about managing conflict and allows us to identify four major styles.

Each of these four styles (see the diagram below) has advantages and disadvantages for the individual depending on the context in which they are used. However, it is self-evident that the **collaborating style** of responding to workplace conflicts has the higher likelihood of producing outcomes for the benefit of all involved. People using this style assume a problem-solving approach, and actively aim to defuse negative emotions and find a mutually satisfying solution to problems.



People with avoiding or dominant styles often antagonise others and produce further conflict by the way they communicate. People with an accommodating style can frustrate others and develop feelings of resentment over the neglect of their own needs, which again can feed future conflict.

It is important to understand which style you have and how you interact with your team members, supervisors and managers. You will get the best out of people when you understand where they are coming from and don't expect everyone to operate the same way that you do.

In a healthy workplace not all conflict is bad and by encouraging people to openly talk about their different views and disagreements in a calm and structured way, a culture of positive conflict awareness can be created, new ideas received and become a benefit for the team and the organisation as a whole.

A useful checklist is provided below to help you work through any workplace issues with peers or a supervisor/manager.

FACILITATING DISCUSSIONS BETWEEN PARTIES INVOLVED IN CONFLICT

Behaviour	Yes	No

Do I listen carefully without interrupting?		
Do I show concern and encourage the parties to resolve the conflict?		
Do I express empathy?		
Do I ask open-ended questions		
Have I acknowledged and validated each person's position/feelings?		
Have I allowed sufficient time for each person to have their say?		
Do I make sure I have heard the entire message before reacting?		
Have I summarised each party's position?		
Am I displaying impatience or defensiveness?		
Have I dismissed the importance of the issue?		
Am I judging the parties involved?		
Do I deny the feelings of those involved in the conflict?		
Do I argue or disagree with the feelings expressed by the parties involved?		
Have I tried to solve the problem too quickly?		
Have I assumed responsibility for fixing the problem rather than empowering those involved to generate their own solutions?		
Have I approached the concerns objectively by looking at the problem not the person?		
Do I show a genuine desire to understand the other person's point of view?		

If the conversation gets heated, do I reschedule another time to talk?		
Have I sought advice and assistance in dealing with the conflict?		

It's important to note that if you have identified that the conflict is the result of a clear breach of policy (e.g. allegations of unlawful discrimination, harassment, bullying, racial or religious vilification or victimisation, conflict of interest) or that you don't have the necessary skills to manage it locally, seek additional assistance from your supervisor or manager or refer the issue to your Human Resources department as soon as possible.

In many workplaces the following types of policies and procedures are available on the intranet or in the supervisor/manager's office:

- Conduct and Compliance Policy, including any Conflict of Interest issues
- Discrimination and Sexual Harassment Grievance Procedures
- Dispute Settlement and Grievance Procedures
- A link to the State Government's WHS website
- Employment related grievance advisors e.g. a Union Rep, the EAP
- WHS Policies and related documentation such as material safety data sheets (MSDS) to clarify safe work practices
- Placement of EAP information to assist employees seeking confidential counselling

Often the EAP will be utilised by employees who have anger management issues or colleagues who have been on the receiving end of such behaviour. They may attend because they have been asked to do so through a performance management directive or self-refer.

According to a recent workplace report up to 42 per cent of workers reported incidences of yelling and other kinds of verbal abuse in their workplace. Of workers surveyed, up to 30 percent admitted to having yelled at a co-worker themselves. Employees may attend one-on-one counselling sessions or take part in group therapy. It is important to note that those who are on the receiving end of such anger may also require counselling.

How an Employer responds to a critical incident at their workplace is critical as it affects the psychological, emotional, behavioural and physical aspects of an employee. EAP counsellors can provide Critical Incident Stress Debriefing services to all parties

involved in an incident. If such situations in the workplace are not dealt with it can have a devastating effect not only on your fellow employees but the whole community.

Critical Incident Stress Debriefing has been shown to reduce clinical depression as well as post-traumatic stress disorder both of which require long term support. By accessing debriefing for staff, management will be minimising psychological distress and in the long term be saving money by improving staff retention and minimising a loss of skilled workers.

Adjusting to change in the workplace can cause stress. When you change staff duties, you need to be conscious of what may be considered a reasonable change within the scope of their position and what may constitute a redundancy or termination if challenged.

Change is a reality in the current business environment and, if done well, can help grow your whole organisation and therefore increase your job safety. Some employees may also see change as an opportunity rather than a threat. Reasonable changes are generally those that do not alter the essential position. Implementing significant changes to an employee's duties can have risks, primarily occurring when an employee claims:

- Their position is redundant
- They have been effectively (and unfairly) dismissed
- They have been treated unfavourably because of a protected attribute (i.e. race, gender, union affiliation or age to name just a few)

Claims of unfavourable treatment are mostly pursued under *Fair Work Act 2009* and the equal opportunity acts. A key risk for employers arises when there are other employees who do not have their position changed. If the changes are not managed well there is the risk of staff feeling disenfranchised or fearing reduced job security, which can result in possible staff turnover or low morale.

Activity 2.2

Review the equal opportunity legislation for your state by following the appropriate link at <http://www.business.gov.au/business-topics/employing-people/Pages/equal-employment-opportunity-and-anti-discrimination.aspx>. How well does your organisation meet the standards set in this legislation?

In any situation of change, the manager or supervisor should be prepared to outline exactly what the issues are as well as the changes that are proposed to rectify these.

Important questions employers should consider include:

- What is the issue (examples include lack of coverage during lunch hours, upcoming holidays or sick leave)
- How many employees may be affected – more than one may require broad consultation, including union involvement
- Does this impact on current entitlements or hours
- Will this impact on the job classification and pay rates - are the changes of a nature that may result in a higher or lower classification
- How to approach and implement this change
- Personal issues may also impact on employee performance and these issues can also be dealt with in counselling and help them to cope with work and the issue(s) affecting their physical and mental health

Changes can be introduced in a positive way resulting in a win-win situation for you and your employer. Successful communication and consultation between management and employees is also critical to your business' success. If you understand what the business is trying to achieve and the effect your contribution has on it, you will be more productive.

Poor communications can result in misunderstandings and mistrust. Not having feedback can lead to low morale and substandard employee performance. Employees whose instructions are inadequate or unclear can act in breach of regulations without meaning to.

Whilst changes to hours, rosters or work areas and teams may feel disruptive at first, it may actually result in a better work-life balance and put you more in control of your working life, which reduces stress while increasing productivity and reducing unscheduled days off. Feeling a sense of ownership over the new changes and being a part of implementing them successfully may also reduce staff turnover. Recruitment is costly and not just in a financial sense. Staff retention improves morale, staff loyalty and commitment.

Another area of work related stress is when an employee is promoted beyond his/her ability, promoted too soon, or promoted into an unwanted or unsuitable role (e.g. a technical expert or successful salesperson who becomes a manager, but lacks people management skills or misses the intellectual content or 'buzz' of the previous job). You may be seen as ready by your supervisor or manager but not have all the skills required to confidently managing your new role. This is when one-on-one discussions with your

mentor or coach may assist you to seek more support and resources such as training both in the workplace and via a third party.

It may also be that the organisation's Development and Promotion policies require review. The opposite situation is also a great cause of stress in the workplace - redundancies and demotions. This means the offer by an employer and the acceptance by an employee of a lower graded position with the same employer, with the common (but not obligatory) consequence of a reduced wage or salary. Demotion is sometimes the result of disciplinary action by an employer (instead of dismissal) or for reasons unrelated to the employee such as a change in the financial circumstances of the business.

If you are offered a demotion you must decide if you wish to accept it to stay on in the organisation or to look for an alternative position. It may be that vacancies for your type of role are not plentiful and you may need to take that into consideration whilst searching for something else. On the other hand it may be a relief to some staff to step down from a position of responsibility which is only increasing and causing them great stress. A demotion should not be confused with a legitimate direction to take up other duties which fall within the parameters of an existing position.

In the same way, redundancies are not perceived by all employees as a bad thing though much media attention focuses on that negative aspect. If viewed positively, redundancies can provide the impetus for a career change.

According to research from the Department of Education, Science and Training, most Australians will change career seven times in their life. In looking to move to another organisation, perhaps using existing skills or employing underutilised skills from your existing position you need to arm yourself with some background information on the workplace as it is today. Many people have a fixed view on what is available 'out there' but have not conducted any research into the real possibilities. New jobs are being invented all the time.

Websites such as <http://jobs.reinventyourcareer.com.au/> provide excellent background information to assist you in making well considered changes to your career. Australia has a population of 22.4 million people. 11.1 million of these people are currently working with 55% of the labour market being situated in Melbourne, Sydney and Brisbane.

37% of workers are in regional areas. With the median age of a working Australian at 37.2 years old the largest 15 year sector of our workforce is aged 30 to 44 years old. However, did you know that 38 % of the workforce is now over the age of 45 years old? Yet, workers younger than 25 years old only account for 17% of the workforce?

By the year 2016, people aged 45 and over will account for more than 80% of work force growth in Australia. With this demographic backdrop demonstrating a creeping crisis approaching, your career reinvention could be the best way forward. Organisations are asking, “Who is going to fill the ‘Workforce Age Gap Crisis’ as older workers seek self-fulfilment or scale back their work commitments or exit the workforce all together?”

Self-Test 2.7

There are 4 stages of stress that you may go through:

- In the first stage, you may find yourself overworked and reluctant to take time off work to recharge and re-energise
- In the second stage, you may find yourself unduly tired, irritable and feeling like you are under achieving. You may also be skipping meals and generally not taking the best care of yourself or your relationships
- In the third stage, you may feel resentful or guilty, you do not get as much enjoyment out of spending time with family and friends and you may not be enjoying work at all
- Finally, you may withdraw completely, succumb to illness, feel like you have failed in some way and you may even break down both emotionally and physically

- ☐ True
- ☐ False

Self-Test 2.8

EAP counselling is aimed at assisting employees to:

- Understand and clarify issues that are directly concerning them, including any underlying issues
- Identify and explore options to address those issues
- Develop plans to approach the issues and find constructive solutions
- All the above

IDENTIFY SOURCES OF STRESS AND ACCESS APPROPRIATE SUPPORTS AND RESOLUTION STRATEGIES

In a survey carried out by the Australian Psychological Society in 2012 the found that that almost one in three working Australians (32%) identified issues in the workplace as a source of stress.

Working Australians who reported that their employer valued their work contribution and cared about their wellbeing at work had significantly lower levels of stress and distress. These working Australians also had significantly lower levels of anxiety and depression symptoms and significantly higher levels of the overall wellbeing.

Financial issues remain the leading cause of stress amongst Australians, with close to 50% of Australians identifying personal financial issues as a cause of stress.

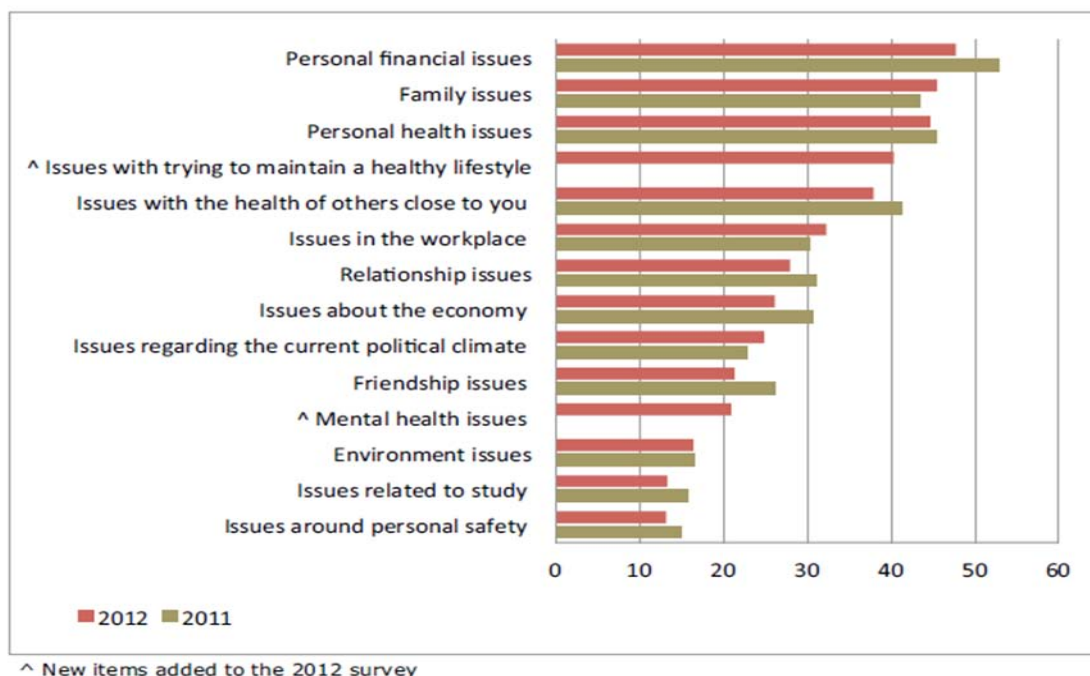


Figure 1. Prevalence (%) of sources of stress in 2012 compared with 2011

(Stress and wellbeing in Australia in 2012: A state-of-the-nation survey (Oct 2012))

There are very many proven skills that we can use to manage stress. These help us to remain calm and effective in high pressure situations and help us avoid the problems of long term stress.

Modern life is full of hassles, deadlines, frustrations, and demands. For many people, stress is so commonplace that it has become a way of life. Stress isn't always bad. In small doses, it can help you perform under pressure and motivate you to do your best. But when you're constantly running in emergency mode, your mind and body pay the

price. You can protect yourself by recognizing the signs and symptoms of stress and taking steps to reduce its harmful effects.

WHAT IS STRESS?

THE BODY'S STRESS RESPONSE

When you perceive a threat, your nervous system responds by releasing a flood of stress hormones, including adrenaline and cortisol. These hormones rouse the body for emergency action.

Your heart pounds faster, muscles tighten, blood pressure rises, breath quickens, and your senses become sharper. These physical changes increase your strength and stamina, speed your reaction time, and enhance your focus—preparing you to either fight or flee from the danger at hand.

Stress is a normal physical response to events that make you feel threatened or upset your balance in some way. When you sense danger—whether it's real or imagined—the body's defences kick into high gear in a rapid, automatic process known as the “fight-or-flight” reaction, or the stress response.

The stress response is the body's way of protecting you. When working properly, it helps you stay focused, energetic, and alert. In emergency situations, stress can save your life—giving you extra strength to defend yourself, for example, or spurring you to slam on the brakes to avoid an accident.

The stress response also helps you rise to meet challenges. Stress is what keeps you on your toes during a presentation at work, sharpens your concentration when you're attempting the game-winning free throw, or drives you to study for an exam when you'd rather be watching TV.

But beyond a certain point, stress stops being helpful and starts causing major damage to your health, your mood, your productivity, your relationships, and your quality of life.

HOW DO YOU RESPOND TO STRESS?

It's important to learn how to recognize when your stress levels are out of control. The most dangerous thing about stress is how easily it can creep up on you. You get used to it. It starts to feel familiar even normal. You don't notice how much it's affecting you, even as it takes a heavy toll. The signs and symptoms of stress overload can be almost anything. Stress affects the mind, body, and behaviour in many ways, and everyone experiences stress differently.

STRESS DOESN'T ALWAYS LOOK STRESSFUL

Psychologist Connie Lillas uses a driving analogy to describe the three most common ways people respond when they're overwhelmed by stress:

- Foot on the gas – An angry or agitated stress response. You're heated, keyed up, overly emotional, and unable to sit still.
- Foot on the brake – A withdrawn or depressed stress response. You shut down, space out, and show very little energy or emotion.
- Foot on both – A tense and frozen stress response. You "freeze" under pressure and can't do anything. You look paralysed, but under the surface you're extremely agitated.

SIGNS AND SYMPTOMS OF STRESS OVERLOAD

The following lists cover some of the common warning signs and symptoms of stress. The more signs and symptoms you notice in yourself, the closer you may be to stress overload.

STRESS WARNING SIGNS AND SYMPTOMS

COGNITIVE SYMPTOMS

- Memory problems
- Inability to concentrate
- Poor judgment
- Seeing only the negative
- Anxious or racing thoughts
- Constant worrying

EMOTIONAL SYMPTOMS

- Moodiness
- Irritability or short temper
- Agitation, inability to relax
- Feeling overwhelmed
- Sense of loneliness and isolation

- Depression or general unhappiness

PHYSICAL SYMPTOMS

- Aches and pains
- Diarrhoea or constipation
- Nausea, dizziness
- Chest pain, rapid heartbeat
- Loss of sex drive
- Frequent colds

BEHAVIOURAL SYMPTOMS

- Eating more or less
- Sleeping too much or too little
- Isolating yourself from others
- Procrastinating or neglecting responsibilities
- Using alcohol, cigarettes, or drugs to relax
- Nervous habits (e.g. nail biting, pacing)

Keep in mind that the signs and symptoms of stress can also be caused by other psychological and medical problems. If you're experiencing any of the warning signs of stress, it's important to see a doctor for a full evaluation. Your doctor can help you determine whether or not your symptoms are stress-related.

HOW MUCH STRESS IS TOO MUCH?

Because of the widespread damage stress can cause, it's important to know your own limit. But just how much stress is "too much", differs from person to person. Some people roll with the punches, while others crumble at the slightest obstacle or frustration. Some people even seem to thrive on the excitement and challenge of a high-stress lifestyle.

Your ability to tolerate stress depends on many factors, including the quality of your relationships, your general outlook on life, your emotional intelligence, and genetics.

Things that influence your stress tolerance level:

- Your support network – A strong network of supportive friends and family members is an enormous buffer against life's stressors. On the flip side, the more lonely and isolated you are, the greater your vulnerability to stress

- Your sense of control – If you have confidence in yourself and your ability to influence events and persevere through challenges, it's easier to take stress in stride. People who are vulnerable to stress tend to feel like things are out of their control
- Your attitude and outlook – Stress-hardy people have an optimistic attitude. They tend to embrace challenges, have a strong sense of humor, accept that change is a part of life, and believe in a higher power or purpose
- Your ability to deal with your emotions – You're extremely vulnerable to stress if you don't know how to calm and soothe yourself when you're feeling sad, angry, or afraid. The ability to bring your emotions into balance helps you bounce back from adversity
- Your knowledge and preparation – The more you know about a stressful situation, including how long it will last and what to expect, the easier it is to cope. For example, if you go into surgery with a realistic picture of what to expect post-op, a painful recovery will be less traumatic than if you were expecting to bounce back immediately

Here are some questions you could ask yourself:

- Am I in control of stress, or is stress controlling me?
- When I feel agitated, do I know how to quickly calm and soothe myself?
- Can I easily let go of my anger?
- Can I turn to others at work to help me calm down and feel better?
- When I come home at night, do I walk in the door feeling alert and relaxed?
- Am I seldom distracted or moody?
- Am I able to recognize upsets that others seem to be experiencing?
- Do I easily turn to friends or family members for a calming influence?
- When my energy is low, do I know how to boost it?

CAUSES OF STRESS

The situations and pressures that cause stress are known as stressors. We usually think of stressors as being negative, such as an exhausting work schedule or a rocky relationship. However, anything that puts high demands on you or forces you to adjust can be stressful. This includes positive events such as getting married, buying a house, going to college, or receiving a promotion.

What causes stress depends, at least in part, on your perception of it. Something that's stressful to you may not faze someone else; they may even enjoy it. For example, your morning commute may make you anxious and tense because you worry that traffic will make you late. Others, however, may find the trip relaxing because they allow more than enough time and enjoy listening to music while they drive.

WHAT'S STRESSFUL FOR YOU?

What's stressful for you may be quite different from what's stressful to someone else. For example:

- Karen is terrified of getting up in front of people to perform or speak, while her best friend lives for the spotlight
- Phil thrives under pressure and performs best when he has a tight deadline, while his co-worker, Matt, shuts down when work demands escalate
- Anita enjoys helping her elderly parents. Her sister, Constance, helps out as well but finds the demands of caretaking very stressful
- Richard doesn't hesitate to send food back or complain about bad service when eating out, while his wife, Miranda, finds it much too stressful to complain

EFFECTS OF CHRONIC STRESS

The body doesn't distinguish between physical and psychological threats. When you're stressed over a busy schedule, an argument with a friend, a traffic jam, or a mountain of bills, your body reacts just as strongly as if you were facing a life-or-death situation. If you have a lot of responsibilities and worries, your emergency stress response may be "on" most of the time. The more your body's stress system is activated, the harder it is to shut off.

Long-term exposure to stress can lead to serious health problems. Chronic stress disrupts nearly every system in your body. It can raise blood pressure, suppress the immune system, increase the risk of heart attack and stroke, contribute to infertility, and speed up the aging process. Long-term stress can even rewire the brain, leaving you more vulnerable to anxiety and depression.

DEALING WITH STRESS AND ITS SYMPTOMS

While unchecked stress is undeniably damaging, there are many things you can do to reduce its impact and cope with symptoms.

LEARN HOW TO MANAGE STRESS

You may feel like the stress in your life is out of your control, but you can always control the way you respond. Managing stress is all about taking charge: taking charge of your thoughts, your emotions, your schedule, your environment, and the way you deal with problems. Stress management involves changing the stressful situation when you can, changing your reaction when you can't, taking care of yourself, and making time for rest and relaxation.



LEARN HOW TO RELAX

You can't completely eliminate stress from your life, but you can control how much it affects you. Relaxation techniques such as yoga, meditation, and deep breathing activate the body's relaxation response, a state of restfulness that is the opposite of the stress response. When practiced regularly, these activities lead to a reduction in your everyday stress levels and a boost in your feelings of joy and serenity. They also increase your ability to stay calm and collected under pressure.

Everybody has the power to reduce the impact of stress as it's happening in that moment. With practice, you can learn to spot stressors and stay in control when the pressure builds. Sensory stress-busting techniques give you a powerful tool for staying clear-headed and in control in the middle of stressful situations. They give you the confidence to face challenges, knowing that you have the ability to rapidly bring yourself back into balance.

One of the first ways we can start to identify and monitor stress is by using a Stress Diary. Stress Diaries are important for understanding the causes of short-term stress in your life. They also give you an important insight into how you react to stress, and they

help you to identify the levels of pressure at which you prefer to operate. (After all, a little bit of pressure can be a good thing!)

One of the best ways to identify sources of stress is to keep a stress diary for a two to three week period. When you begin to feel stressed, you could look at what you are doing and what you were doing before feeling stressed, and then makes a mental note of these.

As well as helping you capture and analyse the most common sources of stress in your life, Stress Diaries help you to understand:

- The causes of stress in more detail
- The levels of pressure at which you operate most effectively
- How you may be able to improve the way you manage stress

Every time you make an entry, record the following information:

- The date and time of the entry
- The most recent stressful event you experienced
- How happy you feel now, using a scale of -10 (the most unhappy you've ever been) to +10 (the happiest you've been). As well as this, write down a description of the mood you're feeling
- How effectively you're working now on a scale of 0 to 10. A 0 here would show complete ineffectiveness, while a 10 would show the greatest effectiveness you have ever achieved
- The basic cause of the stress (being as honest and objective as possible)

You may also want to note:

- The symptoms you felt (for example, "butterflies in the stomach," anger, headache, raised pulse rate, sweaty palms, etc.)
- How well you handled the event: Did your reaction help solve the problem, or did it actually make things worse?
- First, look at the different stresses you experienced during the time you kept your diary. Highlight the most frequent stresses, and also the ones that were most unpleasant

Analysing your Stress Diary

- Working through the stresses you've highlighted, look at your assessments of their underlying causes, and well you handled the stressful event. Do these highlight problems that need to be fixed? If so, list these areas

- Next, look through your diary at the situations that cause you stress. List ways in which you can change these situations for the better
- Finally, look at how you felt when you were under pressure, and note how it affected your happiness and your effectiveness. Was there a middle level of pressure at which you were happiest and performed best?

Having analysed your diary, you should fully understand what the most important and frequent sources of stress are in your life, and you should better understand the levels of pressure at which you are happiest. You should also know the sort of situations that cause stress, so that you can prepare for them and manage them well.

You will see the real benefits of having a Stress Diary in the first few weeks that you use it. After this, you may find that you have better uses for your time. If your lifestyle changes or you begin to suffer from stress again, then it may be worth using the diary approach one more time. You'll probably find that the stresses you face have changed.

One way of removing stress from your life – both at work and at home – is learning how to say NO. For example, a more senior member of staff asks you to do a task or join a new project group:

- “I promised (insert name of your supervisor here) I wouldn’t take on any more projects without discussing them with her first. (This not only makes it someone else’s decision but also postpones it and allows you to decide if you really want to say no.)”

Or your own supervisor asks you to do an extra task:

- “I’d be happy to do this for you but realistically I cannot do it without leaving some other things I’m working on unfinished. Which would you like me to do first? Which can I put aside until later on?”

Self-Test 2.9

Stress is a normal physical response to events that make you feel threatened or upset your balance in some way.

- ☐ True
☐ False

Self-Test 2.10

The cognitive signs of stress could be what? Select all that apply.

- ☐ Memory problems
- ☐ Headache
- ☐ Inability to concentrate
- ☐ Poor judgment
- ☐ Loss of sex drive
- ☐ Frequent colds
- ☐ Seeing only the negative
- ☐ Anxious or racing thoughts
- ☐ Constant worrying

Self-Test 2.11

The situations and pressures that cause stress are known as stressors.

- ☐ True
- ☐ False

TOPIC 3 - COORDINATE PERSONAL SKILL DEVELOPMENT AND LEARNING

IDENTIFY PERSONAL LEARNING AND PROFESSIONAL DEVELOPMENT NEEDS AND SKILL GAPS USING SELF-ASSESSMENT AND ADVICE FROM COLLEAGUES AND CLIENTS IN RELATION TO ROLE AND ORGANISATIONAL REQUIREMENTS

Good learning and information skills are essential for successful professionals in the workplace. Early in your career you must study a huge volume of information simply to become effective. As you become increasingly successful, you'll need to process large volumes of documents, data and reports just to keep up-to-date in your field.

The main reason for all training is to learn something new or improve a skill. But what determines how much you learn and how successful the training is? Often it's the effort you put into it. We attend training programs for all sorts of reasons. Think about what you want to gain from the program. Certainly you'll learn skills you need to do your job better, but what other benefits are there? We might want to upgrade our skills, learn new things, or take longer-term training to change careers.

You know how important it is to ensure that you and your team members are given plenty of training and development opportunities. However, it's just as important to focus on your own personal learning and development. To do this, it's essential to set aside enough time which can be difficult as it is competing with family and social obligations. However, when you make learning a priority, you increase your value to your organisation. You become more marketable as a professional and you're in a better position when you apply for a challenging project, seek a promotion or apply for another job.

Depending on your level of previous experience you may be assigned a mentor in the first few weeks in the job. Feedback on how well you understand the job will be gained as part in this mentoring process. Most organisations have regular staff appraisals where you'll be given feedback in relation to how well you perform your tasks. This feedback will come to you directly from external sources e.g. customers and internally from your supervisors and colleagues and perhaps other departments within your organisation. The precise methods employed to evaluate your performance and the recording of that information are likely to be detailed in your organisation's policies and procedures along with timeframes for these sessions. Most commonly they are yearly,

however in some areas, where KPI's carry crucial safety factors they may occur more often, quarterly or half yearly.

How you perform your tasks and the way you conduct yourself is in itself a means of promoting your organisation. The impression you leave people with is the impression they will take away with them about your organisation. Reviews help you to understand your role in the organisation and how you fit into the bigger corporate picture. Generally feedback for all staff is gained and given to allow you to make informed choices about your career, now and in the future.

WHAT SKILLS SHOULD I BE CHOOSING FOR MY PERSONAL DEVELOPMENT?

Once you have researched all the training providers and have your questions answered you can begin to sort through the list and decide on a couple that suits your requirements.

There are several simple steps to this activity.

- Start with the training that does not suit your requirements or family/personal commitments. Put these aside as for now they will not be included
- Then choose the ones that fully meet your requirements for training and for your personal/family commitments. Hopefully you have a couple of these or at least some that meet most of your criteria
- Then sort out the rest. Some will be 50/50 on meeting your requirements now but they may meet them at a later date

Don't dispose of any of your research as what does not suit you now may work well for you in the future. For example: You may need public transport to get you there now but you may be able to drive at a later date when you have a car or a license. You also may need to be home for children now but in the future you may have someone who can do some child minding for you or the children may start school. Never give up because of obstacles.

WHY SHOULD YOU CREATE A PERSONAL DEVELOPMENT PLAN?

Personal development planning means creating opportunities to think through, in a structured way, questions such as:

- What do I really want to achieve from life?
- What kind of person do I want to be?

- Am I clear about my personal goals and ambitions?
- Am I making the right decisions to get me where I really want to be?
- Am I in charge of my life and my studies - or am I just hoping it all will work out somehow?

What are the benefits of a Personal development plan to your working life?

- It gives you clearer ideas about the kind of life and work you want
- It gives you greater confidence in the choices you make
- It gives you greater confidence in the skills, qualities and attributes you bring to the career of your choice
- It will place you in a better position to compete for jobs
- You will be better able to discuss your skills, personal qualities and competences with employers
- You will be better at problem-solving and planning skills
- It will help you develop the positive attitudes and approaches associated with a successful professional life

Many employers now expect employees to understand their own performance - and to know how to adapt to meet times of increased workload, stressful situations or conditions of change.

Employees are often expected to show personal commitment to their own professional development, actively seeking out information, training and events that will keep their skills and knowledge up-to-date. Knowing how to learn, and how you learn best, will be invaluable in the work place.

WHY SHOULD I RECORD MY STRENGTHS AND WEAKNESSES?

Most of us would like to recognise our strengths but how many of us like identifying our weaknesses? If we can recognise our weaknesses we are able to do something about turning that weakness into a strength.

Although you may find this a little confronting and/or challenging to begin with it is actually a really important step in the process.

Using the top section of the table below as an example, in the space below it, begin to identify some of your strengths and weaknesses. Be honest about it, because if you are not you may make the wrong choice for yourself.

Once you have completed your own strengths and weaknesses table you will be in the position to then list the current skills you already have. The strengths you have listed will be some of the current skills you have however; as far as skills are concerned for this step you will be able to add many more. Some of the skills you could write down could be:

- Good with money
- Excellent communication skills
- Love working with people
- Good at working in a team environment
- Good at working independently
- Excellent personal presentation
- Punctual
- And the list goes on ...

Then you can do the same for knowledge. You may have been working in the tuck shop in your child's school. This is all experience for your career. You would have probably completed the skills needed for a food handler's certificate, handled money and many other duties that have given you knowledge and skills in an area without you even realising it. There are many ways we gather knowledge in our lives, both formal and informal and you need to consider these when completing this task.

HOW DO I KNOW WHAT THE REQUIRED SKILLS ARE?

The next step is to record all the skills and knowledge required to do the job you would like to do.

Previously you have gathered information about the jobs you would like to do and the training required to do it. You have also recorded your current skills and knowledge. Now is the time to record all this in a plan for your career. From the information you gathered previously outline all the skills and knowledge you need for the job role you have chosen – list them down the left of a table such as the one below. Then work your way across the table completing each section as you go for each required skill.

Required Skills and knowledge					
Skill required	Skill possessed	Current level	Required level	Update required	Meets criteria required
Communication	Yes	Excellent	Excellent	No	Yes

Product knowledge	Yes	Good	Excellent	Yes	No

As you can see, documenting the required skills and knowledge will allow you to look clearly at whether you actually meet the requirements or whether you will need to update or up-skill in the near future.

Self-Test 3.1

Fill the gaps with words from the list below:

Training, improve, new

The main reason for all _____ is to learn something _____ or _____ a skill.

Self-Test 3.2

What are the benefits of a personal development plan to your working life?

- ☐ It gives you clearer ideas about the kind of life and work you want
- ☐ It gives you greater confidence in the skills, qualities and attributes you bring to the career of your choice
- ☐ It will help you develop the positive attitudes and approaches associated with a successful professional life
- ☐ All the above

IDENTIFY, PRIORITISE AND PLAN OPPORTUNITIES FOR UNDERTAKING PERSONAL SKILL DEVELOPMENT ACTIVITIES IN LIAISON WITH WORK GROUPS AND RELEVANT PERSONNEL

Developing your skills and knowledge for the area you work in is not only valuable to the organisation you are working for it's also a great way of improving your job satisfaction. When you really confident about your job and your abilities you will enjoy your work a lot more.

Knowing your job well also means that you can make some decisions about where you want to be in the future. Once you've reached the highest level in your area you might like to advance to a higher position or expand your skills and knowledge in a different direction. Listening to feedback at performance reviews helps you to discover your strengths and weaknesses and enables you to make those clear decisions. Concentrating on what you are good at and being able to enhance skills which are

needed but not your strength means that increase your value to the company and make yourself more employable in other organisations as well.

It is one thing to think about improving your skills and knowledge, but to make these thoughts a reality means that you need to take responsibility for your own learning and personal skill development. This is not as hard as you might think. Many organisations offer training and professional development workshops which create opportunities for staff to develop and expand their skills. No matter what is offered to you or is available privately if you choose to study for your own interests or future career, it's up to you to take advantage of them so that you can achieve the career goals you set for yourself.

Your supervisor, manager or HR (Human Resources) department will have information available regarding traineeships, further study, professional development workshops, product information days, First Aid training, Fire Warden training and Union Representative training to name just a few of the opportunities to gain knowledge for you and allow you to contribute to your area and ultimately to the organisation's success.

You may have been assigned a 'buddy' or a 'coach' in your induction phase with the company to observe you working and provide feedback and facilitate problem solving to enhance your performance or correct any lack of knowledge. Coaching supports an employee as he/she learns new tasks either through on-the-job training or when introducing new procedures or technologies.

Once you are familiar with your role you may be able to access a mentor in the workplace to help you move forward in your career. Mentoring can be a formal or informal relationship between senior and junior employees for the purpose of supporting learning and development. The mentor provides ongoing support, advice, and career direction to an employee. A mentor holds a higher position and is usually outside the employee's chain of supervision. Mentoring is used to continue the development of talented and skilled staff members and often to groom or prepare individuals who show high potential for management or leadership responsibilities. They may also be available to assist you to retrain and prepare you for a new job or function.

An individual training plan may be draw up at your performance review and in addition, you may be asked to take part in special projects or be co-opted to work in another area of the organisation to broaden your skills and allow a greater appreciation of your part in it. Special projects or assignments are often used to:

- Enhance an employee's knowledge or skills in a particular area

- Complete tasks or assignments when a mix of people with expertise in different areas is needed
- Prepare an employee for career advancement or develop specific knowledge or skills
- Broaden an employee's knowledge of other functions and departments in the organization
- Motivate and challenge an employee who has been on a job for a long time.
- Two of the most common types of special assignments are shadowing and rotational assignments
- A shadowing assignment is an assignment during which you observe another person in his/her daily routine for a period of time. These assignments give you a sense of the duties and responsibilities of the job and how the person handles the work and situations that arise
- A rotational assignment is a detail or transfer to another position or work unit to broaden your knowledge of different operations and working environments

Most importantly, taking advantage of any training and mentoring adds skills and experience to your resume, hopefully safeguarding your tenure with the organisation and assuring advancement of your career.

Self-Test 3.3

Developing your skills and knowledge for the area you work in is not only valuable to the organisation you are working for, it's also a great way of improving your job satisfaction.

- ☐ True
- ☐ False

ACCESS, COMPLETE AND RECORD PROFESSIONAL DEVELOPMENT OPPORTUNITIES TO FACILITATE CONTINUOUS LEARNING AND CAREER DEVELOPMENT

Continuing professional development or PD as it is commonly referred to, keeps you up-to-date with knowledge and the skills to succeed in your career. To ensure your knowledge remains relevant, organisations and Unions often offer training at various levels to show their commitment to an informed, trained, safe workforce.

Some unions focus solely on educating their members about being a delegate for that union and occupational health and safety – now known as Workplace Health and Safety. Organisations may work with unions to educate and train their staff and have specific requirements for PD.

You may be required to complete a set amount of PD hours each year and keep an up-to-date record of your activities using a form which will be provided in your work area. It may be a hard copy or you may need to log on to a staff intranet which allows you to enter (and perhaps even book) a course of training. You may be required to provide this record and evidence when you attend your performance review.

It is very likely you will also be asked to evaluate the training you have undertaken. Staff members who attend courses and workshops are usually expected to complete an evaluation form and forward copies to their supervisor and the training provider, who use the evaluation process and records as part of an ongoing quality assurance process. It also allows your organisation to implement in-depth evaluation procedures for major staff development programs to ensure that the skills and knowledge are applied competently. To put it simply, they want to make sure they are getting value for money when you attend training of any kind.

Self-Test 3.4

Complete the following personal development plan

Personal Development Plan Worksheet									
Name			Current Position			Date Started			
Career Mission Statement (what you intend to accomplish and why)									
Major Career Goals (what you need to accomplish in the medium term to further your mission)									
Goal		Target Date		Goal		Target Date			
Goal		Target Date		Goal		Target Date			
Goal		Target Date		Goal		Target Date			
Skills Audit A: I have accomplished this skill/I demonstrate high competence B: I have this skill/competency but some improvements could be made					C: I need to improve this skill/competency D: I need to put in considerable work to develop this skill/competency E: I need to acquire this skill/develop this competency				
Skill/Competency					Skill/Competency				
	Now	6m	1yr	3yr		Now	6m	1yr	3yr

Action Plan for the next 6/9/12 months (circle the appropriate timescale)									
Development Goal	Action Steps	Complete by	Obstacles/Solutions				Evaluation		
I am committing to these goals and will review this Personal Development Plan on a regular basis and update it as necessary.									
Signature:						Date:			

INCORPORATE FORMAL AND INFORMAL FEEDBACK INTO REVIEW OF FURTHER LEARNING NEEDS

Feedback is essential for people to know how they are progressing, and also, evaluation is crucial to the worker's confidence too. A successful conclusion to your annual performance review should help you and your supervisor or manager understand the following:

- What has been done?
- What is left to do?
- What is the quality of my team's objectives?
- How well aligned are the people in my team?
- How are they progressing on achieving their goals/objectives?
- Where do I need to focus to drive better outcomes?

Once these questions have been answered, and taking on board any comments which may have been conveyed informally as well, you and your supervisor should have all the information you both need to come up with any training or mentoring you need to enhance your skills before the next review period. This timeframe is called a ratings period – covering the time between one performance review and the next.

It is important to understand the difference between formal and informal feedback. Both are valuable and relevant. Firstly, the easiest to take on board and which usually doesn't present to staff as threatening in any way is the informal approach.

Informal feedback involves concrete, practical suggestions given either immediately, during (particularly if safety is a concern) or immediately following, an action or customer interaction. For example, brief feedback might be given while you are practicing the appropriate use of a platform ladder. They come in various sizes and can look deceptively similar to a domestic ladder, however in the workplace you may be using it on a slippery or uneven surface and reaching for material which is heavier than you would attempt to handle at home. The feedback may be preceded with "Let me show you an easier way to lock those casters" or "Let me give you some feedback on your lifting technique".

Formal feedback can be given outside of performance reviews and can happen in cases where an informal approach is not appropriate or sufficient. It is when a set period of time, usually five to 20 minutes or longer, is set aside for reflection and providing practical suggestions following a particular workplace experience. For example, formal feedback might be scheduled immediately after your team has participated in a safety drill in order to assess whether the team performed efficiently and discuss any areas of the exercise that may need improvement. At other times, it may be given after a particularly difficult client encounter or when inappropriate behaviours or actions have been observed in the workplace. Respect for privacy and appropriate timing of this form of feedback is important as all aspects of the situation need to be determined before the appropriate action is taken. Formal feedback is also the feedback that is provided during weekly scheduled supervision sessions in which case, the period of time may be from 30 minutes to one hour. These can simply take the form of a team meeting, or a one-on-one with your supervisor to touch base with any issues arising that you may not have had the opportunity to discuss with them. It is also an opportunity to bring up any sensitive issues that require intervention or solution from a higher level employee.

This form of feedback advocates the encouragement of staff self-evaluation and should therefore be interactive. Generally, you know that the feedback will be given, and so will have had opportunity to reflect on performance. For example your supervisor could open the session with a question such as "How did that training session go for you?" and then "What went well, and what might you have done differently/better?" Points you make during self-evaluation can then be reinforced and solutions and strategies for improvement explored.

The final and most well-known type of feedback is the official Performance Review, also known as an Appraisal. Traditionally the purpose of this formal process, sometimes but not always held with a senior staff member who you may not know very well, is to gain the kind of information management need to make decisions regarding their workforce:

1. Promotion, separation, and transfer decisions
2. Feedback to the employee regarding how the organisation viewed the employee's performance
3. Evaluations of relative contributions made by individuals and entire departments in achieving higher level organisation goals
4. Criteria for evaluating the effectiveness of selection and placement decisions, including the relevance of the information used in the decisions within the organisation
5. Reward decisions, including merit increases, promotions, and other rewards
6. Ascertaining and diagnosing training and development decisions
7. Criteria for evaluating the success of training and development decisions
8. Information upon which work scheduling plans, budgeting, and human resources planning can be used

Two major flaws in the traditional approach to performance appraisal exist. The flaws are:

- Organisational performance appraisal is typically primarily concerned with the past rather than being forward looking through the use of setting objectives or goals
- Performance appraisal is usually tied to the employees' salary review. Dealing with salary generally overwhelms and blocks creative, meaningful, or comprehensive consideration of performance goals

Developmental performance appraisals focus instead on relating to employees as individuals. This uses the performance appraisal as a contributor to employee motivation, development, and human resources planning. The development approach contains all of the traditional overall organisational performance appraisal purposes and the following additional purposes:

1. Provides employees the opportunity to formally indicate the direction and level of the employee's ambition
2. Shows organisational interest in employee development, which helps the enterprise retain ambitious, capable employees instead of losing the employees to competitors
3. Provides a structure for communications between employees and management to help clarify expectations of the employee by management and the employee
4. Provides satisfaction and encouragement to the employee who has been trying to perform well

The manager has the unenviable job of:

1. Translating organisational goals into your job objective
2. Communicating management's expectations regarding your performance
3. Providing feedback to you about job performance in light of management's objectives

4. Coaching you on how to achieve job objectives/requirement or arranging for this to take place via the training department or through a third party
5. Diagnosing your strengths and weaknesses
6. Determining what kind of development activities might help you better utilise your skills to improve performance on the current job

This needs to be done for every staff member the manager is responsible for and requires time, effort and tact to do it well. Hopefully your organisation has previously conducted a skills audit (which can be incorporated into your PD review), reviewed your resume and consulted you about your work and personal goals. Once you and your supervisor clearly understand the difference between what you need to know and what you know right now you will discover the skills gaps and be able to determine how to gain the knowledge or abilities that are required.

This typically consists of four inter-related steps as follows:

1. Establish a common understanding between the manager (the person doing the evaluating) and you (the person being evaluated) regarding work expectations; mainly, the work to be accomplished and how that work is to be evaluated
2. Ongoing assessment of performance and the progress against work expectation. Provisions should be made for the regular feedback of information to clarify and modify the goals and expectations, to correct unacceptable performance before it is too late, (via informal feedback and more formal one-on-one meetings) and to reward superior performance with proper praise and recognition
3. Formal documentation of performance through the completion of a performance and development appraisal form appropriate to your organisation
4. The formal performance and development appraisal discussion, based on the completed appraisal form and ending in the construction of a Personal Development Plan for you (also known as a Professional Development Plan)



Some organisations also conduct what is called 360 Degree Feedback, sometimes referred to as multi-rater appraisals or multi-source feedback (see the above diagram). It is a tool designed to address the problem of being judged by only one person and trying to remove any personal prejudices that may exist between the reviewer and you. By gaining feedback from peers, reports, managers and even internal and external customers a person gets a valuable insight into how others see them. Feedback is no longer one dimensional. This multi-dimensional approach often provides great insights into how different groups see you. For example leaders really need to understand how their reports see them, just as much as they need to understand how their own boss sees them.

Now that you have completed your skills audit, had your performance review, given 360 degree feedback to your team and your supervisor and come up with a Personal Development Plan for the next rating period - you are now ready to put everything you've done so far into a format that is measurable and actionable to help you keep on track as you progress along the work and training path you have both decided on for the next ratings period.

Self-Test 3.5

Informal feedback is concrete, practical suggestions given either immediately, during (particularly if safety is a concern) or immediately following, an action or customer interaction.

- ☐ True
- ☐ False

Self-Test 3.6

Fill the gaps with words from the list below:

Feedback, performance, informal

Formal _____ can be given outside of _____ reviews and can happen in cases where an _____ approach is not appropriate or suffice.

Self-Test 3.7

Fill the gaps with words from the list below:

Describe, hear, effective

To give _____ feedback, you should only _____ what you honestly know, see, _____ and feel.

SUMMARY

In summary it is very important in your work life that you organise your work priorities and continue with professional development. Upgrading your current skills and knowledge will ensure you maintain a valuable position in your organisation.

If you have any questions please feel free to contact your trainer they will be only too happy to assist you.