

TRAINING TOOL



Workplace Performance Evaluation

DRIVING THE FUTURE



Workplace Performance Evaluation

The purpose of this performance evaluation is to allow supervisors to assess the competency (i.e. the skills and knowledge) of commercial vehicle operators under their supervision. A performance evaluation can be completed for every driver in a fleet, regardless of the driver's experience level. For example, new drivers can be assessed during on-boarding training when they are just learning many of the skills required for the job. Experienced drivers can also be assessed to affirm their competency and to identify areas for development and improvement. Performance Evaluations can be conducted before, during or after the completion of learning/training and as part of periodic human resource management efforts.

USING THE PERFORMANCE EVALUATION

The performance evaluation can be conducted by an individual(s) who directly supervises the driver. This individual(s) will vary depending on the experience and skill level of the driver being assessed. During the initial training and onboarding phase, a driver trainer or coach/mentor/assessor may conduct the evaluation; a driver supervisor or manager may conduct a performance evaluation of an experienced driver as part of an annual review process. Regardless of who conducts the evaluation, the process remains the same.

HOW TO USE THE PERFORMANCE EVALUATION

There are 3 steps to using the Performance Evaluation tool. Please note that Step 1 is optional, depending upon the workplace.

STEP 1: Define workplace ratings for each competency/performance criterion.

Prior to conducting any evaluation of worker performance, the supervisory staff must rate each element of competency/performance that will be used to score the individual. These ratings must represent the realities of the workplace where the individual is employed. The individual's score will be compared to the workplace rating. The criteria used to rate each element of competency/performance are shown below.

0	1	2	3	4
Not relevant or required in the workplace	Occasionally required, not important	Required element of the job function, low importance	Required element of the job function, moderate importance	Critical element of the job function, high importance

STEP 2: Define workplace target for each performance evaluation element

An overall target rating for each element of the performance evaluation must also be established. To develop the workplace target, the ratings for each competency/performance criterion should be added and then averaged.

The workplace target for each performance evaluation element will vary depending on the experience level of the driver. For example, the workplace target(s) for new drivers will likely be lower than the target(s) set for experienced drivers.

This difference in target ratings considers the level of skills development and experience of drivers along the learning continuum. Each workplace can develop expected workplace targets for various driver levels.

STEP 3: Assess the driver’s performance

Each individual must be given a score for each competency/performance criterion based on his/her performance of the particular task. The scoring may be determined by one assessor or by consensus among several assessors who have direct interaction with the driver. The criteria used to score each element of competency/performance are shown below.

1	2	3	4
Novice	Functional	Competent	Master
Individual appreciates the value and need for the competency	Individual has partially acquired the competency	Individual has fully acquired the competency	Individual has mastered the competency
Implication: Significant further development is needed; tasks cannot be performed	Implication: Support and guidance are still needed	Implication: Completes work tasks independently	Implication: Able to mentor others

After assigning a score for each competency/performance criterion, an overall score for each competency element can be determined by totalling all ratings and determining the individual’s average score. The average score can then be compared to the workplace average score to determine if the individual is meeting, exceeding or falling short of workplace expectations.

STEP 4: Determine Required Action(s)

By comparing the driver score with the workplace target for each performance element, the assessor can determine if the driver is meeting, exceeding or falling short of the expected performance of the performance element. The result of this assessment will determine the actions that are required. Actions may include providing a reward for excellent performance, incentivizing enhanced performance or identifying the need for remedial action such as enhanced training or learning opportunities.

It is important to note that the Performance Evaluation is meant to be a positive tool that is meant to identify areas for improvement and development to enhance the safety and efficiency of drivers.

STEP 1: Assign workplace rating(s) for each competency/ performance criterion using rating scale (if using)

STEP 2: Determine workplace scoring target for Element (i.e. 12 (total workplace rating)/4 (number of tasks) = 3)

STEP 3: Assess driver’s performance of each competency/performance criterion (using rating scale). Determine average driver score (i.e. 10 (total score) / 4 (number of tasks) = 2.5)

STEP 4: Compare Workplace Scoring Target and Average Driver Score. Consider Required Action(s).

PERFORMANCE EVALUATION – ELEMENT 1 Personal Development, Workplace Relationships and Social Skills				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	1.1 Meets workplace expectations for <u>internal</u> social interaction and communication while on the job.			
	1.2 Consistently complies with workplace policies relating to risk awareness and hazard avoidance.			
	1.3 Meets workplace expectations for <u>external</u> engagement, communication and interaction while on the job.			
	1.4 Follows procedures relating to workplace conduct and seeks help whenever uncertain about any workplace issue.			
Workplace Scoring Target for Element 1			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 1				
Personal Development, Workplace Relationships and Social Skills				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	1.1 Meets workplace expectations for <u>internal</u> social interaction and communication while on the job.			
	1.2 Consistently complies with workplace policies relating to risk awareness and hazard avoidance.			
	1.3 Meets workplace expectations for <u>external</u> engagement, communication and interaction while on the job.			
	1.4 Follows procedures relating to workplace conduct and seeks help whenever uncertain about any workplace issue.			
Workplace Scoring Target for Element 1		Average Driver Score		

PERFORMANCE EVALUATION – ELEMENT 2 Dependability and Administrative Task Completion				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	2.1 Consistently meets expectations for following workplace instructions.			
	2.2 His/her conduct with respect to job task analyses and hazard assessments meets workplace expectations.			
	2.3 Meets workplace expectations for effective use of communication and electronic systems.			
	2.4 Consistently meets workplace expectations for producing written communication.			
	2.5 Consistently meets workplace expectations for security related to work activities.			
	2.6 Meets workplace expectations for numeracy tasks.			
	2.7 Meets workplace expectations for computer usage.			
	2.8 Consistently meets workplace expectations for managing vehicle and cargo documentation.			

PERFORMANCE EVALUATION – ELEMENT 2, continued
Dependability and Administrative Task Completion

Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	2.9 Meets workplace expectations in providing information necessary for fuel tax records.			
	2.10 Consistently maintains driver's daily logbooks that are compliant with the regulations.			
Workplace Scoring Target for Element 2			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 3 Service to Shippers/Receivers				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	3.1 Consistently meets workplace expectations for appearance and behaviour.			
	3.2 Consistently meets workplace expectations in shipper and customer staff engagements.			
	3.3 Consistently follows workplace requirements for correct use of PPE.			
Workplace Scoring Target for Element 3			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 4 Preparedness, Planning and Problem Solving				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	4.1 Meets workplace expectations for handling stress and fatigue.			
	4.2 Meets workplace requirement to consistently be ready and fit for work.			
	4.3 Meets workplace expectations for injury prevention.			
	4.4 Meets workplace expectations/ needs in planning for weather and road conditions			
	4.5 Meets workplace requirement for successful route and work planning.			
	4.6 Meets workplace expectation/ requirement for planning related to vehicle height, weight and route restrictions.			
	4.7 Meets workplace requirement for planning/taking necessary work breaks at appropriate locations.			
	4.8 Meets workplace requirement for planning fuel refills at appropriate times and locations.			

PERFORMANCE EVALUATION – ELEMENT 4 , continued Preparedness, Planning and Problem Solving				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	4.9 Meets workplace requirement for weight and dimension compliance.			
	4.10 Meets workplace expectations/ needs in planning and preparing for expected and unexpected challenges.			
Workplace Scoring Target for Element 4			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 5 Knowledge, Use and Care of Equipment				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	5.1 Follows workplace requirements for use of PPE around vehicles.			
	5.2 Meets workplace expectations related to understanding of vehicle configurations.			
	5.3 Meets workplace expectations for consistently inspecting, monitoring and reporting vehicle conditions.			
	5.4 Meets workplace expectations related to making minor vehicle repairs.			
	5.5 Consistently meets workplace expectations for engine warm up and cool down procedures.			
	5.6 Meets workplace requirements/needs for use of on-board heating equipment.			
	5.7 Meets workplace expectations for safe operation of coupling devices.			
Workplace Scoring Target for Element 5			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 6 Daily Inspection Requirements				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	6.1 Consistently monitors vehicle condition according to regulations, and to workplace expectations.			
	6.2 Consistently completes and processes inspection reports according to regulations, and to workplace expectations.			
	6.3 Consistently deals with vehicle defects according to regulations, and to workplace expectations.			
Workplace Scoring Target for Element 6			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 7 Cargo Securement				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	7.1 Meets workplace expectations for understanding of relevant cargo documents and symbols.			
	7.2 Meets workplace expectations for dealing with cargo handling and equipment needs.			
	7.3 Meets workplace requirements for cargo and loss prevention procedures.			
	7.4 Consistently keeps cargo secure according to regulations, and to workplace expectations.			
	7.5 Consistently uses and maintains cargo securing devices according to regulations, and to workplace expectations.			
	7.6 Meets workplace expectations for managing cargo status and managing cargo documentation.			
Workplace Scoring Target for Element 7			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 8 Off-Road Tasks and Maneuvers				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	8.1 Consistently secures vehicles properly.			
	8.2 Consistently enters and exits the vehicle properly.			
	8.3 Consistently meets workplace expectations/needs for proper vehicle set up for weight and dimension compliance.			
	8.4 Consistently follows all workplace, shipper and customer procedures in loading docks.			
	8.5 Consistently meets workplace expectations for safe and proficient backing.			
Workplace Scoring Target for Element 8			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 9 On-Road Driving				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	9.1 Consistently meets workplace expectations for avoiding fatigue and exercising poor judgement.			
	9.2 Consistently meets workplace expectations for maintaining adequate following distance.			
	9.3 Consistently meets workplace expectations for avoiding unsafe operating conditions.			
	9.4 Consistently meets workplace expectations for vehicle speed.			
	9.5 Consistently meets workplace expectations for avoiding any aggressive or discourteous driving.			
	9.6 Consistently meets workplace expectations for avoiding any incident involving distracted driving.			
	9.7 Consistently meets workplace expectations for proper railway crossing.			
	9.8 Consistently meets workplace expectations for avoiding collision and impact with any obstruction.			

PERFORMANCE EVALUATION – ELEMENT 9, continued				
On-Road Driving				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	9.9 Consistently meets regulatory requirements and workplace expectations for entering vehicle inspection facilities.			
	9.10 Consistently meets regulatory requirements and workplace expectations/needs for over-weight or over-height vehicle.			
	9.11 Consistently meets regulatory requirements and workplace expectations for toll routes and bridges.			
	9.12 Consistently meets regulatory requirements and workplace expectations for vehicle parking.			
	9.13 Consistently meets regulatory requirements and workplace expectations for turns.			
	9.14 Consistently meets regulatory requirements and workplace expectations for U-turns.			
Workplace Scoring Target for Element 9			Average Driver Score	

PERFORMANCE EVALUATION – ELEMENT 10 Fuel Consumption				
Workplace Rating	Competency/ performance criterion	Score	Evaluator Comments	Required Action(s)
	10.1 Meets workplace expectations for using auxiliary power.			
	10.2 Consistently meets workplace expectations for vehicle idling.			
	10.3 Consistently meets workplace expectations for fuel consumption.			
	10.4 Consistently meets workplace expectations for proper fueling of vehicle.			
Workplace Scoring Target for Element 10			Average Driver Score	