



## Reliable Pressings Manager & Team Leader Appraisal Form

This is for use when monitoring the manner and effectiveness with which a Manager or Team Leader (broadly defined as anybody whose duties involve managing and co-ordinating the activities of other Reliable Pressings' staff) are executing their duties and responsibilities. It is recommended that formal documented appraisals be held quarterly but performance management and coaching form part of a manager's day to day interactions with those reporting to them. The appraisal is to be used as a formal document and is to be signed off formally by the Manager or Team Leader being appraised and the person conducting the appraisal.

Manager/Team Leader name:	
Appraiser name:	
Appraiser Position	
Appraisal Date:	
Dates of period covered:	



## 1. 360 Review

This is a performance evaluation tool that solicits feedback about a manager or team leader from multiple but relevant perspectives: customers/clients, fellow managers, and their direct reports. A **360 review** seeks to provide actionable feedback to an employee and gives them a better understanding of their contributions to the business.

The tool we use for generating and publishing 360 reviews is the same as that used in our ISO9001:2015 quality management system for, interested party (previously referred to as stakeholders) monitoring and review tool.

<https://www.reliable-pressings.co.za/survey/admin/index.php>

This allows us to retain a history of feedback to objectively measure progress, and to retain the survey questions and areas of focus.

Link to 360	<a href="https://www.reliable-pressings.co.za/survey/index.php?survey=35ce7b3">https://www.reliable-pressings.co.za/survey/index.php?survey=35ce7b3</a>
Name of Survey	Toolroom Manager 360 Feedback - Direct Reports
Participation	Full participation took place, all direct reports provided feedback
Focus	The survey questions were focused on those duties specifically articulated in the Duty Sheet, which involve direct reports and upon which direct reports should have a valid opinion.
Survey Questions asked	
Are you part of the toolroom team or do your duties require you to interact with the toolroom and <b>Mr Johnny Scott</b> constantly?	
Has <b>Mr Johnny Scott</b> conducted a safety risk assessment of the Toolroom with you, including any tools you might use in performing your duties?	
Has <b>Mr Johnny Scott</b> met with you to explain his vision for the Toolroom?	
Has <b>Mr Johnny Scott</b> met with you and gone through your Duty Sheet and made clear his expectations of you?	
Has <b>Mr Johnny Scott</b> discussed, designed and implemented any Quality Management Principles with you in the toolroom?	
Has <b>Mr Johnny Scott</b> discussed your strengths and areas for development? Are these considered in the allocation of work?	
Has <b>Mr Johnny Scott</b> been able and willing to help you with constructive advice based on his deep technical insights?	
Has <b>Mr Johnny Scott</b> managed to build rapport with you? Does he motivate and inspire you to do and be better?	
Is <b>Mr Johnny Scott</b> what you expected and has he made the business stronger since his arrival?	
Please mention anything you think will be useful in assessing Mr <b>Scott's</b> performance over his 2 months' probation period.	
Observations and Conclusions from Survey Responses	



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2. Progress against Core Responsibilities recorded in Duty Sheet.			
How has the manager/team leader delivered on their Core responsibilities? Has their behaviour been consistent with our Code of Conduct? And can we make an assessment on how well they have managed to deliver on their Duties in General?			
Entry	Entry	Assessment of Delivery	Evidence in support or comments in mitigation
Ensure that safety of your toolroom staff is always guaranteed, especially with regard to mechanical turning equipment such as lathes	a. Conduct a baseline risk assessment of the Toolroom (and any other areas or tools your staff might use in performing their duties <sup>1</sup> ) with the Health & Safety Officer and any other risk that can be immediately life threatening	Completely ignored - no evidence of any attempt to fulfill this responsibility.	There is no comment in mitigation as this was at most a co-ordination task and requires minimal effort in its execution and delivery.
	b. Contract the Health & Safety officer on what monitoring metrics you wish her to capture for you (and monitor)	Completely ignored - no evidence of any attempt to fulfill this responsibility.	As above
2. Attend and actively participate in Production Planning meetings.	These are to be held as often as is reasonably necessary to ensure:	Task actioned	No comment
	i. Toolroom tasks and new die making is properly prioritized	Task actioned	Covered in comments below
	ii. Reasonable deadlines are set and then met for tooling activities.	Not Actioned Adequately	We missed a deadline to present a key piece of work for an opportunity with E6 that conservatively runs to over R10 million - we had to cancel the meeting at 10pm the night before. Now a week end and some

<sup>1</sup> Forklifts, and Heat Treatment equipment for example. opp



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			days have passed and STILL this work is not complete. No urgency has been demonstrated. I find this situation completely unacceptable.
	iii. There is timely procurement of steel, consumables and tools	Actioned but not in manner requested	The recording of this is meant to happen in point v but because this is not done, the procurement is done rather more casually. This will become an issue on larger more difficult jobs.
	iv. The correct people must attend this meeting	Actioned but by default	No comment
	v. Recording of job allocation is required for performance tracking and costing	That which was recorded was done so poorly that no performance tracking or costing can be done.	This issue has been raised numerous times and very clear communication has been recorded clarifying just how essential it is that this Core function MUST be properly done.
3. Develop and embed Quality Management principles within the Toolroom,	a. Instill workshop discipline so that Quality objectives are met – Quality Workmanship, Delivered on time within a Safe Working Environment.	Completely ignored - no evidence of any attempt to fulfill this responsibility.	
	b. Understand, Develop and Comply with ISO9001:2015 Quality Management Principles and ensure all documentation is accurately completed at each stage of the fabrication process.	Completely ignored - no evidence of any attempt to fulfill this responsibility.	The first continuous improvement initiatives aimed at a) reducing waste and rework and b) enabling a new performance bonus scheme for all Production staff (which includes the Toolroom)



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	c. Measure strength and weaknesses of workers and give each worker a monthly performance score based on objective measurement from your tracking spreadsheet.	Completely ignored - no evidence of any attempt to fulfill this responsibility.	This is a non-negotiable and essential in developing and helping our people grow. This is also a key input into the Performance Bonus scheme we wish to implement
4. Implement continuous improvement in so far as Die and Tooling designs are concerned, specifically regarding:	<ul style="list-style-type: none"> <li>a. Operator throughput and efficiency of productivity</li> <li>b. Number of operations required</li> <li>c. Ergonomics of tooling and the improvement of die design</li> <li>d. Storage, Recording, Tracking and general management of tooling</li> <li>e. Safety of the workshop in using the tooling developed by you and your team</li> </ul>	Completely ignored - no evidence of any attempt to fulfill this responsibility.	<p>I expressly sat and discussed this with Mr [REDACTED] and I explained to him how for these kinds of projects would be used the the financial benefit of both the person/people identifying the opportunity and those making it happen.</p> <p>I even gave him an idea to work with, which was how to use the scrap slugs generated in a certain job, which has an ID of 31mm, and using this to generate washers where the OD is 30-31mm.</p> <p>I then showed him how for a volume of 50,000 if his share was just 10c on each, that the benefit in 1 month alone was worth much more than anything earned through overtime.</p> <p>We discussed how this position is perfectly suited to allow the application of brain power for personal financial gain, instead of time at work.</p>



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### 3. **Core Duties** - key responsibilities and duties that must be executed uncompromisingly, and which others are depending on.

Is the manager/team leader providing assurance that they understand why these duties must be executed and that they must be executed without prompting and continuous reminders. Failure to delivery can have longer term impacts on other people.

#### **Assessment**

Any mention that this assessment is a surprise will only serve to re-enforce this position. Mr [REDACTED] is not able to prioritise and deliver upon a wide scope of responsibilities. The foundational competencies of time management, organisation, are lacking and these cannot be taught or trained at this stage. Unfortunately, his core technical abilities are lacking, and this has undermined his credibility and standing in the workshop.

### 4. **Knowledge and skills** - a foundation upon which we build credibility, earn respect and generate long term value

Is the manager/team leader diligently applying their education, and experience and insights in the execution of their duties and in coaching and developing their team? Do they possess and reflect the understanding and skills required for their domain of expertise to support the rest of the business and for it to meet not only operational goals but strategic initiatives over the longer term.

#### **Assessment**

In a technical environment, knowledge and skill are the foundation upon which the respect of others is built. Already he is experiencing push back from staff and the collective feedback from the online structured survey shows they have no faith in his ability to do what is required. I have personally observed that in two instances (a deep draw on 2mm material and the E6 job which still has not been done), he was unable to be of use. In the first instance, Nelson came in over the week end and solved the problem and in the second instance this will probably happen again. I mention Nelson as this pertains to comments on the next section.



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**5. Behaviour and attitude** - Our personal values and those the business claims are not a list words, but evident in our observed behaviours and the attitudes these actions reflect.

The Reliable Pressings Code of Conduct is one of the ways we put our values into practice. It's built around the recognition that everything we do in connection with our work at Reliable Pressings will be, and should be, measured against the highest possible standards of ethical business conduct. Each has a personal responsibility to incorporate, and to encourage others in the business to demonstrate these principles of the Code and values into their actions at work.

### Assessment

The lack of emotional intelligence and the misplaced double standards regarding your son that you have hired as a tool maker speaks volumes and is beginning to cause resentment. We have made it clear that family ties should never exclude us from having talented, dynamic people in our business. We have a long history of fathers and sons (and daughters in my case) working in the business. The difference is that they are ALL held to an even higher set of standards because they are family. Moreover, it is our experience that the 2<sup>nd</sup> generation hold themselves to a higher standard too. Their prime concern is not to let their parent down or disappoint them in any way. Your son does not appear to suffer from this burden.

I have told you explicitly that the capture of job allocations, with the data I have defined, is to be used to track productivity and individual performance. I have made it clear to you that the inability of the toolroom to function is a risk to the business and that your primary end goal (or measure of success) is to remove this risk by getting the best out of current staff and attracting the correct talent. Recent events lead me to question whether this is indeed a goal you have, and the best interests of the business at heart.

Last week, Thursday 27<sup>th</sup> May, I took a new tooling requirement to him sample in hand, with you present, to make my own assessment of his ability. My reference points for comparison were firstly the previous toolmaker whose temporary employment you terminated, and your son replaced, and secondly, Nelson Magampa. May I remind you that Nelson was the person entirely responsible for getting the 4-inch pipe coupling deep draw tooling to work for the Ramada Trading order, when you could not. It was difficult, and the reaction from Mr Zeeman, who I took you to see, confirmed this. Nelson has earned my respect many times over. I was expecting even more from your son, quite reasonably.

My assessment of your son's abilities conflict with that which I expected to meet and which this business needs. He in no way demonstrated any of the technical ability, communication skills or character traits demanded by the business of this position, and your motives and judgement in considering him for employment are seriously in question.



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**6. Assessor Conclusion** - Our personal values and those the business claims are not a list words, but evident in our observed behaviours and the attitudes these actions reflect.

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### **Actions**