

Role Evaluation

Heads to Hats

Introduction

The purpose of a "Heads to Hats" evaluation is to outline expectations and what is required of the various roles within your organization. An ideal evaluation will include

- an "internal customer" of the role,
- a direct report, and
- a supervisor

to get a 360 degree view of expectations from the role.

Each individual that is part of the evaluation team has an equal voice and equal representation and it is expected that each team member provides honest and constructive feedback throughout the evaluation process.

Any employee that holds the role being evaluated will not be present for any session in which the team is actively evaluating the various components of their role.

Definitions

Must Do: Requirement of the role for which the consequence of not meeting the expectation is termination.

Must Have: Skills that are required in order to successfully fulfill the "Must Do" requirements.

Must Be: Traits that the individual will demonstrate that will align the role successfully within the organization's mission

Coding Guidelines

Once you've agreed on a "Must Have, Do, or Be" you need to identify the primary/secondary (if any) style for that item. We recommend coding the primary as a capital and the optional secondary as a lower case.

Here's an example of a coded "Must have"

Coaching and mentoring ability - Sv

The must have is **coaching and mentoring** the primary style is **Synergist** and the secondary style is **Visionary**.

Session requirements

Session 1 (60 min)

Phases

- 1: Brainstorm "Must Dos"25 min
- 2: Focused debate to narrow list20 min
- 3: Vote and finalize list15 min

Guidelines

- 3-5 "Must Dos"
- Majority rule for voting

Session 2 (60 min)

Phases

- 1: Brainstorm "Must Haves & Must Bes"25 min
- 2: Focused debate to narrow list20 min
- 3: Vote and finalize list15 min

Guidelines

- 5-7 "Must Haves"
- 3-5 "Must Bes"
- Majority rule for voting

Upon completion of session 2, email results from session 1 and 2 to management team for feedback. Do not send to team member whose role is being evaluated. Determine if adjustments are needed.

Session 3 (60 min)

Phases

- 1: List all final "Dos, Haves & Bes"10 min
- 2: Debate VOPS values for each item.....30 min
- 3: Vote and finalize list10 min
- 4: Score VOPS profile.....10 min

Guidelines

- 3-5 "Must Dos"
- 5-7 "Must Haves"
- 3-5 "Must Bes"
- VOPS Score for each

Heads to Hats: Role Evaluation | Session 1

Position: _____

Date: _____

Team: _____

Must Do: Requirement of the role for which the consequence of not meeting the expectation is termination.

Phases

Guidelines

- 1: Brainstorm "Must Dos"25 min
- 2: Focused debate to narrow list20 min
- 3: Vote and finalize list15 min

- 3-5 "Must Dos"
- Majority rule for voting

"Must Do" Brainstorming

Final "Must Do" List

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Heads to Hats: Role Evaluation | Session 2

Position: _____

Date: _____

Team: _____

Must Have: Skills that are required in order to successfully fulfill the "Must Do" requirements.

Must Be: Traits that the individual will demonstrate that will align the role successfully within the organization's mission

Phases

- 1: Brainstorm "Must Haves & Must Bes"25 min
- 2: Focused debate to narrow list20 min
- 3: Vote and finalize list15 min

Guidelines

- 5-7 "Must Haves"
- 3-5 "Must Bes"
- Majority rule for voting

"Must Have" Brainstorming

"Must Be" Brainstorming

Final "Must Have" List

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

Final "Must Be" List

1. _____
2. _____
3. _____
4. _____
5. _____

Heads to Hats: Role Evaluation | Session 3

Position: _____

Date: _____

Team: _____

Must Do: Requirement of the role for which the consequence of not meeting the expectation is termination.

Must Have: Skills that are required in order to successfully fulfill the "Must Do" requirements.

Must Be: Traits that the individual will demonstrate that will align the role successfully within the organization's mission

Phases

- 1: List all final "Dos, Haves & Bes"10 min
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- 4: Score VOPS profile.....10 min

Guidelines

- 3-5 "Must Dos"
- 5-7 "Must Haves"
- 3-5 "Must Bes"
- VOPS Score for each

Final "Must Do" List

1. _____
2. _____
3. _____
4. _____
5. _____

Final "Must Be" List

1. _____
2. _____
3. _____
4. _____
5. _____

Final "Must Have" List

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

Ideal VOPS Profile

- Visionary _____
- Operator _____
- Processors _____
- Synergist _____