

3.2: Performance Diagnostic Checklist (PDC)

This tool is a modified version of a Performance Diagnostic Checklist, based on the original Performance Diagnostic Checklist (Austin, 2000) and the Performance Diagnostic Checklist-Human Services (Carr, Wilder, Majdalany, Mathisen, & Strain, 2013). The PDC is another tool for assessing the contingencies surrounding the performance of an individual or group of workers. It is typically administered in the form of an interview with managers and key performers to understand how well enabled they are to perform the pinpointed behaviors. That is, do performers have all that is required across four common categories to perform as expected? The PDC assesses variables in four categories—antecedents and information, equipment and processes, knowledge and skills, and consequences.

It is best to use the PDC as an interview, as opposed to a survey. This is because the questions may be confusing or language unfamiliar to the performer,

plus an interview provides the opportunity to ask follow-up questions. While conducting the interview, it is important to provide a safe environment for having the conversation and provide anonymity of responses. Often holding individual meetings helps to ease performers to be open and provide more insights. After all, you are asking the performer to be honest about what gets in the way of performing their best. Depending on history and culture within the workplace, consider bringing a neutral third-party person to ask the questions and gather information to avoid any concerns of retaliation.

After answering yes/no to questions in each of the four categories, those categories with the most **no** responses indicate an opportunity for improvement and thus which type of intervention would be most appropriate. The **OBM Specialist Certificate** offers a series of considerations to resolve **no** responses corresponding to each question.

Antecedents & Information	Yes	No
1. Do employees have a written and detailed job description?		
2. Have the employees received adequate instruction about their job requirements?		
3. Are employees "aware" of the mission of the department/organization?		
4. Are job or task aids visible while completing the task in question? (Reminders to prompt the task at the correct time/duration)		
5. Is the supervisor present during task completion?		
6. Are there frequently updated, challenging, and attainable goals that employees are comfortable with?		

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Equipment & Processes	Yes	No
7. If equipment is required, is it reliable? Is it in good working order? Is it ergonomically correct?		
8. Is the equipment and environment optimally arranged in a physical sense?		
9. Are larger processes performing well despite any incomplete tasks along the way (meaning process disconnects)?		
10. Are these processes arranged in a logical manner, without unnecessary repetition? Are these processes maximally efficient?		
11. Are employees able to complete tasks without any obstacles?		
Knowledge & Skills	Yes	No
12. Can the employee tell you what he/she is supposed to be doing and how to do it?		
13. Can the employee physically/verbally demonstrate completion of the task?		
14. Does the employee have the capacity to learn how to complete the task?		
Consequences (Motivation)	Yes	No
15. Are consequences delivered contingent on the task?		
16. Do employees see the effects of their performance of the task?		
17. Do supervisors deliver feedback to employees about their performance of the task?		
18. Do supervisors monitor employees' performance of the task?		
19. Does the task require little effort to complete?		
20. Can the desired task occur without other tasks competing with it?		

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Antecedents & Information	Number	Potential Solutions
	1, 2	Implement a task clarification.
	3	Share the mission, vision, and values of the organization and how the employees and their performance contributes to it.
	4	Introduce noticeable prompts/reminders/signs.
	5	Increase supervisor presence around the time/place the task should occur.
	6	Implement effective goal setting for the task.
Equipment & Processes	Number	Potential Solutions
	7	Modify equipment to improve reliability.
	8	Modify location of equipment to location where it is used.
	9, 10, 11	Analyze current process steps, identify disconnects and unnecessary steps, and modify.
Knowledge & Skills	Number	Potential Solutions
	12, 13, 14	Implement behavioral skills training.
Consequences (Motivation)	Number	Potential Solutions
	15	Provide meaningful consequences contingent on the employees' performance of the task.
	16	Highlight task outcomes to make impact of employees' performance more visible to them.
	17, 18	Implement more performance monitoring and increase the frequency and/or specificity of performance feedback.
	19	Identify the components of the task that require extra effort, and implement changes to make it easier/less aversive for employees to perform.
	20	Analyze tasks that are competing for the employees' time and change process steps, expectations, or reassign tasks to other personnel to lessen competing behaviors.

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