

Performance Evaluation Assignment

[Student 5](#)

University of Kansas School of Social Welfare

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Introduction

The ability to acknowledge and reward outstanding performance and to circumvent rewarding less than adequate performance is one of the most significant tools to a manager in actualizing excellence in organizational and program performance (Kettner, 2002). This paper will focus on *The Family Conservancy's* Family Asset Building (FAB) program coordinator position for the purpose of this performance evaluation analysis. The writer collected information through telephone, email, face-to-face discussions and subjective interpretation of observable events from the two program coordinators, the program manager and the human resources vice president. [Good.](#)

Critique of Current Appraisal Process

The Family Conservancy's Family Asset Building evaluation form (attached) is based on the trait/behavior checklist model, which is utilized throughout the agency, regardless of the individual's job description. At the time of employment, each staff person receives a copy of the evaluation form so they are aware of the criteria on which their performance will be measured. After an initial 90 day assessment, evaluations are conducted annually during the month of December. The process consists of the appraisee's report which is a self evaluation, a supervisory evaluation, and the performance evaluation form. [Good overview of the process.](#)

The evaluation form is dividend into the following sections: Essential Job Results, sixteen questions relating to the initiative displayed by the supervisee; Professional Interaction, addresses the ability to appropriately interact with program participants and staff, and an awareness of the effect his/her behavior has on others in the work place; and Time Management. All sections are judged subjectively and overall performance is indicated by: exceeds standard, achieves standard or unsatisfactory and needs improvement. [Good.](#)

The process begins by the staff person completing the appraisee's report and giving it to their supervisor. The appraisee's report includes but is not limited to the following questions: In your opinion, what was your major contributions this past year; What are your career goals; What are your long range plans; What could your supervisor do to aid you in effectively performing your job; and List the subjects you would like to discuss during your employee appraisal and development review. The employee also completes a supervisor assessment form and gives this to their supervisor's manager. The supervisor reviews the appraisee's report, along with the prior year's goals and includes this information with the performance evaluation. The supervisory evaluations from the department's staff are included with the performance evaluation. If any areas are indicated as "needs improvement" there is an area for the supervisor to include an action plan, which is time limited. Both the supervisor and staff person sign off on the evaluation and a copy is placed in the staff person's personnel file. If there is a disagreement between the staff member and supervisor an appeal a process is in place for achieving rectification up to a final appeal to the president/CEO of the agency. Good.

The strength of the FAB performance evaluation is in the implementation of an interactive process where both supervisor and supervisee complete their respective appraisal forms. Having a written document is helpful for the supervisee to compare and contrast and then reflect on his/her performance prior to meeting with the supervisor. For this reason it is also good for the supervisor. Good.

FAB is a small program, populated by a group vice president, program manager and three program coordinators. Although it would be claimed otherwise overall, *The Family Conservancy* clearly mirrors the classical bureaucratic management culture which is reflected in its vertical organizational hierarchy. If the staff and manager worked in close physical proximity to one

another they could create a modified version of the Japanese style work group where each helps one another in the development of job relevant knowledge and performance is enhanced by appropriate modeling by the supervisor. One of the two program coordinators thought the annual review was superfluous while the program manager thought merit raises, tied to performance, would be a good idea. The program coordinator thinks that her bi-monthly 90 minute supervision, with the program manager, gives her the necessary feedback direction and the insight as to how the program is facilitated. She did appreciate the importance of meeting annually to discuss pre-established goals and how to develop additional skills to enhance job performance. The program manager stated that the agency takes an egalitarian approach to benefits and pay raises as they are dispersed exclusively though cost of living increases. She lamented that an increase in financial remuneration related to job performance “would be nice”. The subject of diversity is number 23 of 24 queries related to essential job results. The section speaks to the degree of appraisee’s awareness of the expanded meaning of the term and how it applies to the agency’s service population. The writer was unable to identify any language that would encourage dialog on issues of diversity. [Good](#).

Creation and Critique

The writer sees no weakness in the performance evaluation process implemented by The Family Conservancy FAB program. What is significant and lacking is a method whereby the agency tangibly demonstrates appreciation for exemplary performance. In the opinion of the writer, what is at issue is the process in which the agency identifies, hires and retains a knowledgeable staff that is reflective not only of the diversity of those they serve but is capable of performing on a level that insures program output to maximize long-term benefits to those they serve. This is a perceived weakness the writer has regrettably observed in all of his

practicum placements. Defender firms focus on reliability and continuity in a narrow domain; require loyal members who are committed to maintaining the organization for the long term (Taylor & Giannantonio, 1993). Taken on face value, the FAB program exemplifies the statement, “Lifetime experience as a member of an ethnic group, as a woman, as a disabled person, as a gay or lesbian, or for that matter as a white male, nurture a perspective that can be valuable to an organization (Kentner, 2002). The writer wholeheartedly supports Kentner’s view but is in a quandary as to what comes first, education and experience or the need to create diversity, even at the expense of delivering mediocre or substandard client services? The latter is what the writer observed in the FAB program. How does one measure performance if one is unknowledgeable of the service being delivered or is unclear of what real outcomes ought to be? Perhaps this experience is what created the climate in which the writer finds this assignment

frustrating. [Good.](#)

Conclusion (10%)

The writer has only a cursory understanding of the overall agency culture. However, observations and interactions with the Community Service and Development components suggest a disconnect between their stated values expressed in their current strategic plan and those presently playing out within the FAB program. When asked, the program manager said that diversity is discussed in supervision when the need arises. When the writer informed the supervisor of a co-worker’s anti-Semitic remark it was suggested that he direct his discomfort directly to the co-worker. It is unknown if she investigated the allegation. As stated in previous papers, The Family Conservancy’s organizational structure is vertical, flowing from the top down. Senior staff has been in their positions for a minimum of 15 years and all came from inside the agency, in the writer’s opinion their conformity of thought and action may taint their

ability to objectively evaluate the performance of those they supervise. Dependability, predictability and longevity of service guarantee one's advancement to a position in which their very competence is questionable. Should the appraisals challenge a supervisor, in a fortress style culture, they appear to be setting themselves up for a negative form of quid pro quo.

The writer may be experiencing disillusionment (burn-out) or mental fatigue after four years of writing reflection papers and performing analysis of hypothetical situations. He has attempted several times, over the past month, to complete this assignment but has become increasingly lethargic and unenthusiastic. [Sorry to hear this.](#) This does not diminish his respect and appreciation for the instructor or the knowledge gained in the course; he is just experiencing the emotional release that comes from returning to academia as a "non-traditional" student who has completed four non-stop years of undergraduate and graduate studies.

References

- Kettner, P. M. (2002). Achieving excellence in the management of human service organizations. Boston: Allyn & Bacon.
- Taylor, M. S., & Giannantonio, C. M. (1993). Forming, adapting, and terminating the employee relationship: A review of the literature from individual, organizational, and interactionist perspectives. Journal of Management.

While I understand your apathy and lack of enthusiasm for this assignment, I am also left with a tough task to grade a paper not worthy of the work you've done this semester. You have some good insights into the organization and seemed to grasp the challenges of the current evaluation process especially regarding the lack of diversity. You were able to gather others' opinions and talk about the organizational climate but failed to compare to any one else's process. While you didn't revise the instrument, you did talk about revising the process by tying the evaluations to exemplary performance but you didn't elaborate. (For example, you could have justified why evaluations should be tied to performance and how those with exemplary performance would be rewarded.) Plus, there was limited to no critique of the revisions nor any feedback offered by staff. I am assuming at this point, you just wanted to finish your academic career regardless of the outcome. Since choosing to turn in half-hearted work is certainly a choice for yours to make, I hope you don't regret it later. Grade = 70.

I truly enjoyed your presence in class and getting to know you this semester. You have much wisdom and experience that you freely offered to your classmates and to me along the way. I wish you the best as you think about where you will work; whoever hires you will gain a strong asset. Good luck! Judy



THE FAMILY CONSERVANCY
APPRAISEE'S REPORT
 (Use additional sheets if necessary)

Name _____ Review date _____ Length of time in position _____

Functional job title _____

I. In your opinion, what were your major contributions this past year?

II. Career Goals

A. Short-range (within the next year) – Be specific.

What can we do to assist you in achieving these goals? Also, what actions are you taking to achieve these goals?

B. Long-range (3 years and beyond).

What can we do to assist you in achieving these goals? Also, what actions are you taking toward reaching these long-term career goals?

III. Based on the requirements of your current position/assignment, what additional skills/knowledge would help you to more effectively perform your present job?

IV. List any job-related outside activities – professional organizations, formal or informal training – that you have participated in since the last review.

V. What could your supervisor(s) do to aid you in more effectively performing your job?

VI. In your opinion, what are your main strengths?

VII. At this stage of your career, what area(s) of your performance needs improvement?

VIII. List the subjects you would like to discuss during your employee appraisal and development interview.

X. Other comments: Provide any additional information about yourself and

your personal desires (e.g., consider the time you felt the “best” or “worst” about your job) that may be helpful in using your talents and developing your potential.



SUPERVISION ASSESSMENT

Supervisor _____ Date _____

Person completing form (optional) _____

Period covered: From _____ to _____

1. Do you meet on a regular basis with your supervisor? _____

2. Do you have group supervision? _____

If yes, how often? _____

3. If supervision is missed, is it rescheduled within the week? _____

4. Have you set Goals and Objectives with your supervisor? _____

5. How often are Goals and Objectives reviewed? _____

6. Does your supervisor give you sufficient information so that you can perform your job adequately? _____

7. If you are a new employee within the last 12 months, do you feel you were adequately oriented to the agency? _____

If not, comment: _____

8. Do you feel you have ample opportunity to problem-solve in supervision? _____

If not, comment: _____

9. What do you need from your supervisor to more adequately perform your job?

10. How would you evaluate your overall supervisory experience?

Poor__ Below Satisfactory__ Satisfactory__ Above Satisfactory__ Excellent__

11. Additional comments: _____



Family Asset Building (FAB) Program Coordinator Job Description

Reports To: IDA Program Manager

Division: Community Services

FSLA Classification: Exempt

Revision Date: January 2004

FAB Mission: Supporting individuals and families in building an economic future for themselves and their communities through asset development and financial education.

Summary of Position

Coordinates day-to-day FAB program activities, facilitates program stability and positive participant outcomes.

Essential Job Results

With input and approval from Program Manager, maintains staff and volunteer job results by recruiting and hiring qualified staff. Provides regular supervision, on-going coaching, counseling, training and discipline for employees by planning, monitoring and appraising job results monthly.

Facilitates, schedules and recruits speakers for all economic education classes and program orientations weekly or monthly, as needed.

Completes six-month and annual written evaluations of supervisory personnel in a timely, effective manner.

On a monthly basis, provides written reports detailing essential program activities and statistics.

As directed by Program Manager, produces written program reports.

Assists Program Manager in the pursuit of opportunities to secure program resources and community partnerships to enable expansion of the FAB program.

Maintains confidentiality and monitors the effectiveness of policies and procedures that facilitate participant success in purchasing and maintaining their assets.

Monitor the success of FAB participants, tracks demographics, financial information, class attendance and participant withdrawals through the use of the Management Information System

for Individual Development Accounts (MIS IDA). Supervises the process that collects, calculates and reviews all bank statements of accountholders, monthly data entry of account information into MIS IDA monthly and disseminates participant statements monthly.

Ensures case management is provided in person or by phone to all FAB participants monthly: assists with resource and information referral, monitors savings and financial education progress, keeps participants updated on pertinent program rules and deadlines related to asset purchases.

Makes community presentations to prospective accountholders and completes orientations with new participants monthly or as they make application to the program.

Facilitates monthly written communication with participants through newsletters, reminder postcards and program update letters, as applicable.

Attends monthly IDA staff meetings with Heart of America Family Services staff and community partners.

Assists in the promotion of IDAs through communication with potential community partners and other IDAs sites as needed.

Meets with program partners and provides updated program materials and statistics monthly.

Drafts and revises written program material as needed.

Attends national and state IDA conferences, as program funding allows, and actively pursues opportunities to speak publicly about the success of the FAB program at Heart of America Family Services.

Presents potential IDA Program funding sources, with pertinent application requirements and deadlines, to IDA Program Manager and Director of Community Services quarterly or more frequently, as applicable.

Carries out Heart of America Family Services Mission: Insuring Quality, Accessible, Affordable counseling/case management, educational services to families/children and community which helps people thrive in families and communities.

Maintains professional standards and technical knowledge by annual attendance at educational workshops, reviewing professional publications, informs staff and colleagues of the results of these activities.

Attends diversity training yearly. Application of knowledge will demonstrate awareness and support of the wide spectrum of socioeconomic, ethnic, racial and personal lifestyles/cultures found within the service populations. Application of knowledge and sensitivity will be expected in professional and personal conduct.

Accepts, uses supervision, direction, consultation to maximize available resources in the completion of work duties.

Additional responsibilities will be assigned as needed to maintain and improve effective functioning of the department and to advance the mission of the organization.

All job responsibilities will be carried out under the direction of agency policies and procedures.

Required Knowledge, Skills and Abilities

Minimum of a Bachelor's degree in social work, human services, business, finance or related areas. Minimum of two years' experience in community based program development/administration with special knowledge of and experience in areas of financial/budgeting counseling, economic development and/or economic literacy. Experience with and knowledge of programs helping low-income people achieve home ownership, small business or educational goals preferred. Other combinations of education and experience will be considered.

Individual must:

- Develop rapport with program participants and their families.
- Demonstrate familiarity and ability to use Microsoft Office Suite, specifically Word, Excel and Access
- Present information to groups and individuals.
- Lead and collaborate with a diverse group of staff; serve as a positive role model.
- Develop and implement programs and policies; exercise good judgment in developing and following policies and procedures and in conducting Heart of America Family Services business.
- Travel to all parts of the facility and throughout the community.
- Effectively carry out Heart of America Family Services' mission.
- Speak, read, write and hear English to communicate with community members, clients, co-workers and others.

Reporting Relationships and Principal Contacts

Reports to the IDA Program Manager. Principal contacts include other Heart of America Family Services staff, staff and leadership of non-profit and financial services community and program participants and their families.

Supervisory Responsibility

Supervises unit of Americorps*VISTA members; may supervise part-time IDA program associate and various program volunteers and interns as directed by the IDA Program Manager.
Americans with Disability Specifications

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands and fingers to handle or feel objects, tools or controls; reach with hands and arms; climb stairs; talk and hear. The employee must occasionally lift and/or move up to 40 pounds.

Work Environment

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Travel throughout the metropolitan area is required. Work is performed inside and outside the facility and throughout the metropolitan area. Criminal, Kansas and Missouri Child/Elder Abuse and Neglect, and Sex Offender background investigations will be preformed.

I have read and understand this explanation and job description.

Employee's Signature _____

Date _____

Supervisor's Signature _____

Date _____

publicly about the success of the FAB program at The Family Conservancy.

Presents potential IDA Program funding sources, with pertinent application requirements and deadlines, to IDA Program Manager and Director of Community Services quarterly or more frequently, as applicable.

Achieves financial objectives by preparation, analysis, and initiation of corrective actions of assigned programs/ services as needed.

Carries out supervisory responsibilities in accordance with agency policies and applicable laws including interviewing, hiring and training employees; planning, assigning and directing work; appraising introductory and annual performance; rewarding and disciplining employees; addressing complaints and resolving problems in an effective, timely manner.

Carries out The Family Conservancy’s Mission: Investing in families and children by delivering parenting and early education solutions; supporting families in crisis; and helping families overcome poverty.

Maintains professional standards and technical knowledge by annual attendance at educational workshops, reviewing professional publications, informs staff and colleagues of the results of these activities.

Attends diversity training yearly. Application of knowledge will demonstrate awareness of the wide spectrum of socioeconomic, ethnic, racial and personal lifestyles/cultures found within the service populations. Employees are expected to apply knowledge gained from diversity training and to act in a sensitive, nondiscriminatory, professional manner.

Accepts, uses supervision, direction, consultation to maximize available resources in the completion of work duties.

- 1) Professional Interaction—Demonstrates ability to appropriately interact with clients and staff; awareness of own behaviors and their impact on others; work place behaviors and dress are consistent with job duties.

_____ Exceeds Standard—Consistently interacts in professional manner with staff and clients; consistently demonstrates insight and awareness of own behaviors and their impact on others; consistently dresses appropriately for job duties. Employee consistently meets and in many instances exceeds established

standards

_____ Achieves Standard—Interacts in professional manner with staff and clients; demonstrates insight and awareness of own behaviors and their impact on others; appropriate dress for job duties. Employee meets established standards, usually meets and seldom falls short of desired results.

_____ Unsatisfactory/Improvement Needed—Pattern of less than professional interactions with staff and clients; pattern of lacking awareness of own behavior and how it impacts others; pattern of professionally inappropriate dress. Unacceptable performance in professional interactions. Employee lacks consistency, seldom exceeds and frequently falls short of desired results. Documentation from supervisor required.

- 2) Initiative—Demonstrates willingness and ability to seek out opportunities that positively impact services to clients; pro

_____ Exceeds Standard—Consistently is proactive in seeking opportunities that positively impact services to clients; consistently demonstrates problem solving skills. Employee consistently meets and in many instances exceeds

_____ Achieves Standard—Proactive in seeking opportunities that positively impact services to clients; demonstrates problem solving skills. Employee meets established standards, usually meets and seldom falls short of desired results.

_____ Unsatisfactory/Improvement Needed—Pattern of not addressing challenges appropriately; pattern of not seeking opportunities that positively impact services to clients. Unacceptable performance in initiative. Employee lacks consistency, seldom exceeds and frequently falls short of desired results. Documentation from supervisor required.

3) Time Management—Duties accomplished according to specified time schedules; on time for work and meetings as scheduled; returns calls in timely manner; ability to set priorities and time requirements.

_____ Exceeds Standard—Consistently accomplishes duties on time; consistently on time for work and meetings; consistent pattern of organizing and prioritizing duties. Employee consistently meets and in many instances exceeds

_____ Achieves Standard—Accomplishes duties on time; on time for work and meetings; pattern of organizing and prioritizing duties. Employee meets established standards, usually meets and seldom falls short of desired results.

_____ Unsatisfactory/Improvement Needed—Pattern of not completing duties on time; pattern of tardiness to work or meetings; pattern of difficulty in organizing and prioritizing duties. Unacceptable performance in time management. Employee lacks consistency, seldom exceeds and frequently falls short of desired results. Documentation from supervisor required.

4) Supervision—On time for scheduled supervision meetings; organized presentation of issues, questions, challenges, ar

Exceeds Standard—Consistently on time for supervision, consistently notifies supervisor of need for rescheduling meeting; consistent organized presentations of issues, challenges, and proposed solutions; accepts input and complies with directives. Employee consistently meets and in many instances exceeds established standards

_____ Achieves Standard—On time for supervision; notifies supervisor of need for rescheduling meeting; organized present

_____ Unsatisfactory/Improvement Needed—Pattern of erratic promptness or attendance; pattern of failing to reschedule supervision when needed; pattern of not being consistently prepared for supervision; pattern of not consistently providing solutions; pattern of not consistently utilizing input or directives. Unacceptable performance in utilizing supervision. Documentation from supervisor required.

Overall Performance Evaluation

(Include separate description of goals from last evaluation, indicate whether goals were met or unmet.)

_____ Exceeds Standard

_____ Achieves Standard

_____ Unsatisfactory/Improvement Needed

Comments:

Plan for Improvement

(Complete only if “Unsatisfactory/Improvement Needed” is checked for any area of this evaluation. Use additional sheets as necessary.)

1) _____

2) _____

3) _____

4) _____

Measurable Goals for Next Performance Evaluation
(Use additional sheets as necessary.)

1) _____

2) _____

3) _____

4) _____

My signature below represents receipt and review of this evaluation.

Employee's Signature

Date

Supervisor's Signature

Date

Vice President's Signature

Date

President/CEO's Signature

Date