

## ANNUAL PROGRAM COORDINATOR EVALUATION

**Employee's Name:** Steve Erwin

**Location:** Long Prairie 2

**Evaluation:** 2022

### STEPS for the ANNUAL Review Process

1. Supervisor completes the ANNUAL Evaluation Form
2. Supervisor sends the completed ANNUAL Evaluation Form to HR (do not meet with the employee until after HR reviews it)
3. HR reviews and completes their items on the ANNUAL Evaluation Form
4. HR sends the completed ANNUAL Evaluation Form to the Supervisor
5. Supervisor meets with the employee to review the ANNUAL Evaluation Form together
6. Supervisor and employee sign and date the ANNUAL Evaluation Form
7. Supervisor distributes the signed ANNUAL Evaluation Form:  
COPY: in employee's training book  
ORIGINAL: send to HR

### INSTRUCTIONS for completing the ANNUAL Evaluation Form:

1. Please review the sections in the evaluation and choose the best answer for each item.
2. Please comment under Supervisor comments responding to each area, explaining why you chose the answers you did.
3. Once you have completed the review please return the evaluation to Human Resources before meeting with the employee.
4. HR will review the evaluation and return it to you so that you may meet with the employee to review the evaluation together. At that time, you and the employee can develop any action plans that are necessary.

**General - Supervisor to complete**

## 1. Quantity of Work

- A. Consistently produces less than is expected.
- B. Sometimes falls below productivity levels.
- C. Meets standards consistently.
- D. Usually exceeds standards of productivity.
- E. Exceptionally productive; accomplishes far more than is expected.

## 2. Quality of Work

- A. Regularly produces work which does not meet standards of quality.
- B. Occasionally produces work which does not meet standards.
- C. Produces work that consistently meets standards.
- D. Produces above average work.
- E. Produces exceptional work. Employee is seen as a model for others.

## 3. Punctuality of Work

- A. Regularly misses deadlines.
- B. Is sometimes behind schedule.
- C. Is almost always on time with assigned work.
- D. Can be relied upon to meet deadlines and is sometimes ahead of schedule.
- E. Is exceptionally prompt and usually ahead of schedule.

## 4. Initiative, Creativity and Judgment

- A. Often fails to take obviously necessary actions or takes wrong ones.
- B. Sometimes fails to take steps that would solve or head off usual problems.
- C. Deals effectively with usual problems and challenges.
- D. Moves creatively to meet program objectives and solve somewhat unusual problems.
- E. Routinely recognizes and solves unusual problems.

## 5. Commitment to Program Goals

- A. Seems mostly concerned with own convenience, welfare, and advancement rather than success of program.
- B. Too often puts personal concerns ahead of program.
- C. Is generally able to balance personal and program concerns.
- D. Good balance between personal and work responsibilities which allow a satisfactory resolution of almost all conflicts.
- E. Excellent balance between personal and program interests where conflicts rarely arise.

## 6. Ability to Work With Others

- A. Is not effective when work requires cooperative efforts.
- B. Performance is sometimes impaired if it requires working with
- C. Satisfactorily achieves objectives when working with others is
- D. Is able to cooperate with others in a manner that helps produce better work than any one member of the group could produce alone.
- E. Works with others in ways which maximize the contributions

## 7. Ability to Express Self Verbally and in Writing

- A. Unable to communicate even basic or routine material.
- B. Failure to communicate clearly sometimes causes problems.
- C. Communication failures rarely cause problems.
- D. Gets message across even when material is complex.
- E. Able to communicate effectively in almost every environment.

## 8. Planning and Organizing

- A. Needs continual supervision to determine priorities, resource needs, and time to be allotted for even routine tasks.
- B. Sometimes is lax in determining and adhering to priorities, available resources, and schedules.
- C. Sets and adheres to priorities, available resources, and schedules under most circumstances.
- D. Skilled planner and organizer. Grasps problems well and works out overall and detailed solutions.
- E. Exceptional skills in planning and organizing. Anticipates subtle and difficult issues and uses resources imaginatively.

## 9. Response to Crisis

- A. During crises, performance is ineffective.
- B. During crises, performance is somewhat less effective than at other times.
- C. Performance during crises is as effective as at other times.
- D. Rises to the occasion during crises.
- E. Emerges as a superior performer and leader during crises.

## 10. Ability to Solve Problems

- A. Often asks questions or presents solutions that indicate a lack of understanding of routine matters.
- B. Sometimes asks questions or presents solutions which complicate the management of routine problems.
- C. Almost always indicates understanding of routine and many more complex matters.
- D. Usually understands and presents good solutions to new and particularly difficult problems.
- E. Is a person to whom others look for creative and thorough solutions to the most difficult problems.

## 11. Professional Skills in Present Activity

- A. Cannot be trusted in situations when professional judgement is required.
- B. Somethimes makes professional judgments that are not supportable.
- C. Consistently makes professional judgments that are supportable and appropriate.
- D. Is looked to by others for professional advice.
- E. Is recognized by people outside his/her program as an expert in the application of professional skills.

## 12. Supervisory Skills

- A. Frequently causes problems as a supervisor which require intervention.
- B. Sometimes makes supervisory decisions which complicate management problems.
- C. Handles most supervisory problems without difficulty.
- D. Resolves problems and improves employee's performance.
- E. Solves even difficult problems and gets the most out of even difficult employees.

## 13. Growth in Skills During Rating Period

- A. Performance has deteriorated.
- B. Has shown little, if any, improvement.
- C. Showed steady growth.
- D. Progressed more rapidly than most of his/her peers.
- E. Showed much more growth than almost all his/her peers.

## 14. Responsiveness to Supervision?

- A. Usually rejects supervisor guidance without considering its merits.
- B. Somteimes rejects supervisory guidance without considering its merits.
- C. Usually considers supervisory guidance carefully and is usually able to apply it.
- D. Works with supervisory guidance constructively.
- E. Knows when to seek supervisory guidance and is highly creative in implementing recommendations.

**JOB SPECIFIC**

**Time and Attendance - Supervisor to complete**

- |   |     |
|---|-----|
| 1. Does the employee make good use of their time at work?                         | NI  |
| 2. Does the employee arrive at meetings and in-services on time?                  | Yes |
| 3. Does the employee have any tardiness or attendance concerns?                   | No  |
| 4. Have these concerns been addressed with the employee?                          | N/A |
| 5. Does the employee use the timeclock punch system as expected for themselves?   | Yes |
| 6. Does the employee complete their STAR training in a timely manner?             | Yes |
| 7. Does employee hold their house employees accountable to attend staff meetings? | NI  |
|   | N/A |

**Supervisor Comments:**

Steve has done well with completing his STAR training this year. He needs to spend more time helping a few employees get their STAR training done in a timely manner. Steve would benefit from spending down time re-reading Oakridge policies and procedures and he needs to be sure he is in control of his behavior and reactions at all times as he is a role model for staff and clients.

**Documentation - Supervisor to complete**

- |  |    |
|--|----|
| 1. When completing documentation, is it objective, does it provide a clear picture of the event and does it document goal progress accurately? | NI |
| 2. Does employee show competency in completing incident and behavior reports?  | NI |

**Supervisor Comments:**

Steve needs to use the feedback he is given and consistently work to improve his documentation and reports. He is completing reports like the former PC did which needed improvement as well. If the house engaged in more activities and took credit for the ones they do participate in it would make his monthly reports much easier to write. Quotations are very important in client reports.

**Knowledge - Supervisor to complete**

- |  |     |
|--|-----|
| 1. Has the employee completed the annual competencies for the homes they work in and in a timely manner? | Yes |
| 2. Does employee appear to keep the location and staff informed of changes that may occur?               | Yes |
| 3. Does employee understand the difference between punishment and consequences for clients?              | Yes |
| 4. Does employee know, understand and support ORH policies and procedures?                               | NI  |
| 5. Is the employee careful about confidentiality and releasing information appropriately?                | Yes |
| 6. Does the employee respond to email in a timely manner?  | Yes |
| 7. Does the employee demonstrate good boundaries with staff and clients?                                 | NI  |
| 8. Does the employee complete the responsibilities expected of the shifts they work?                     | NI  |

**Supervisor Comments:**

Steve needs to be sure that he is following policies and procedures at all times. When in doubt, go re-read the policies. Steve needs to be sure he is keeping calm and not letting staff or clients know how their behavior is impacting him. Steve needs to role model for staff and empower them to deal with client situations on their shifts without calling him. Steve needs to be sure that he is informing this Administrator of any issues/concerns going on with the house, staff, or clients as they happen rather than waiting until things are out of control.

**Client Related Issues - Supervisor to complete**

- |   |     |
|---|-----|
| 1. Does employee know what is in each client's IAPP?  | Yes |
| 2. Does employee provide the client with effective training?  | NI  |
| 3. Does employee understand how to teach the clients to be independent?   | Yes |
| 4. Does employee respond the same to each client without showing favoritism?  | NI  |
| 5. Is employee flexible in response to different clients and situations?  | Yes |
| 6. Does employee know the client's rights, and advocate for them?   | Yes |
| 7. Is employee a good role model for the clients and other staff by attitude, dress, work ethic, honesty, enthusiasm, etc.? | NI  |
| 8. Does employee accept and offer compliments, criticism, and suggestions?  | Yes |

**Supervisor Comments:**

Steve recently had difficulty with one client which resulted in the client moving out on that day as well as calling Ombudsman and DHS to make a maltreatment report. Steve needs to remember that all clients live in the home for a reason and he has to be the bigger person in times of stress and chaos. He needs to be a positive role model for staff and clients at all times.

**Safety/Property/Vehicle - Supervisor to complete**

- |  |     |
|--|-----|
| 1. Does the employee contribute to providing a warm and cozy atmosphere for the clients' home?   | NI  |
| 2. Does the employee alert the supervisor or office of things that need attention, repair or of things needed to be purchased?   | Yes |
| 3. Does the employee contribute to ensuring the safety of other staff and clients by following safety policies and doing safety related responsibilities such as shoveling, use of ice melt, cleaning, etc.? | NI  |
| 4. Does the employee contribute to care and cleanliness of the vehicle?  | NI  |
| 5. Does the employee appear to follow all safety policies and state law when operating a motor vehicle to ensure the safety of other staff and clients in the vehicle?                                       | Yes |

**Supervisor Comments:**

Steve needs cleaning of the home to be one of his top priorities as it is one of the dirtiest homes companywide. Steve should be cleaning on his shifts and also holding staff accountable for completing their cleaning duties. The house, including the bathrooms, should always be clean enough that if an outsider showed up unexpectedly, there would be no concerns.

**Financial - Finance Department to complete**

- |   |     |
|---|-----|
| 1. Does employee complete the timeclock system supervision responsibilities each payroll such as edits, approvals and send in a completed payroll summary report? | Yes |
| 2. Are occupancy reports submitted in a timely manner?  | NI  |
| 3. Are house budgets submitted in a timely manner each month?   | Yes |
| 4. Are house budgets completed accurately and include all receipts?   | Yes |
| 5. Are client ledgers submitted in a timely manner each month?  | Yes |
| 6. Are client ledgers completed accurately, legible and include all receipts?   | Yes |

**Finance Department Comments:**

Steve does a good job with his ledgers and receipts. He sometimes needs reminders to get the occupancy reports submitted in every 2 weeks. He has been able to stay under on his food and plant budgets. Keep up the good work in this area!

**Human Resources - HR Department to complete**

- 1. Does the employee complete orientation material for new hires in a timely manner? Yes
- 2. Does the employee follow policy and training regarding staff issues? No
- 3. Does the employee follow through on disciplinary issues for staff in a timely manner? Yes
- 4. Has the employee had any disciplines over the last year? If yes- explain in comments. No
- 5. If yes to #4, have these concerns improved since review with the employee? N/A

**HR Department Comments:**

Steve often appears to try and take it upon himself to try and fix things instead of reporting concerns or issues in a timely manner. It is often necessary to reach out to Steve to get information rather than him share it with the office.

**Employee Questions to be discussed during the review (supervisor should record):**

1. Does the employee appear to enjoy their position and being a part of the house team?
2. What does the employee feel are their top 2 strengths?
3. What does the employee feel is an area that could use improvement? (goal for coming year)
4. What would you as an employee like to learn more about in your job?
5. How could we use your talents and experience better?
6. How can your supervisor help you in any of the areas discussed?
7. Is there anything the employee wants to discuss that hasn't been addressed yet?

\*\*\*\*\*

**Employee Acknowledgment:** I have reviewed this document and discussed the contents with my supervisor. My signature means that I have been advised of my performance status and does not necessarily imply that I agree with the supervisor evaluation.

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Supervisor's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**\* ORIGINAL COPY TO HR - ONE COPY TO EMPLOYEE BOOK \***

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Employee Signature: Steve Erwin Date: 12-22-22

Supervisor's Signature: [Signature] Date: 12/22/2022

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