



## **Workday Wednesday – Employee Engagement Meeting**

Location: White Bear Lake, MN

Date: October 2, 2024

Time: 10:00 AM

### **Attendance:**

- Jim Martin - Executive Director
- Brad Martin – Director of Operations
- Dave Sandquist – Director, In-Home Services
- Erin Scanlon – Designated Manager
- Lyndsay Browning – House Manager, Springhill
- Thierry Fokou – House Manager, Hillcrest
- Deb Judd – Agency Coordinator/Human Resources
- Angi Bedessem – Administrative Coordinator

### **Agenda Items:**

#### **Performance Review Process**

A new process for review, completion, and verification of Performance Reviews is implemented and process will begin at next Employee Engagement meeting, scheduled for November 6, 2024. During the meeting, a by-name listing is conducted to ensure past-due and currently due reviews are completed, and the next month's reviews are scheduled. The process is conducted as follows:

- 1) At each Employee Engagement meeting, the three house Managers and In-Home Director will bring the completed Performance Reviews for all past-due reviews and those due during the current month.
- 2) Once approved, updates for wage increases, if applicable, are updated in ProCare prior to conducting the review with the employee.
- 3) A verification email is sent to the assigned manager to notify completion of updates, and they can complete the review with the employee.

#### **Employee Birthday Recognition**

Birthday cards for employees will be available in the corporate office beginning at the next Employee Engagement meeting. The process for recognition is as follows:

- 1) During the Employee Engagement meeting, cards will be signed by the management team for all employees that have birthdays in the next month.
- 2) The assigned manager will purchase a \$10 gift card for each of these employees and it will be placed in the safe, along with the signed card.
- 3) The signed cards and gift cards will be distributed to managers during the Operations Meeting (4th Wednesday of the month) to present to the employee.

#### **Performance Review Form**

During the July Manager Meeting, Jim tasked the staff to review and provide feedback regarding the current Performance Review form, as shown in [attachment 1](#). The task was for recommended changes with the

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objective to make the review requirements objective and measurable. Recommended changes from Erin ([attachment 2](#)) include separation and increase of evaluation areas and implementing a broader points-based scale for ratings.

Discussion was held on whether to reach out to client's parents/guardians for feedback in relation to evaluating the employee's client interaction. The decision was made to not reach out, but any feedback freely provided would be added to employee's notes and included within the Performance Evaluation. Additionally, any legitimate issues or feedback from fellow employees would be taken into consideration.

Tasks to staff:

- Managers review the current Performance Review Form and Erin's suggestions and provide feedback to Erin and Angi by next Wednesday, October 9, 2024.
- Once feedback is received, Angi will draft a new Performance Evaluation Form for review approval.
- Upon implementation of new Performance Evaluation, employees are informed of changes and ensure they are trained on expectations.
- Updated position descriptions will be completed to align with expectations and new Performance Review Form.
- Managers will be trained on expectations regarding documentation regarding Performance Review to include notes, feedback received, coaching, etc.

**Weekly Schedule and Time Sheet Review:**

The review of weekly schedules and time sheets is part of the monthly Employee Engagement meeting; however, it needs to be completed weekly for the residential homes. The schedules must be prepared in advance an overtime accounted for and approved prior to posting the schedule, additionally time sheets must be reviewed to reduce unnecessary and unauthorized overtime.

Tasks to staff:

- Brad will determine amount of time needed for each house manager to review timesheets and schedules.
- House managers will schedule time with Brad every Wednesday to review timesheets for accuracy and make corrections. Schedules will be reviewed for compliance and overtime reduction.

**Jim's Closing Comments**

Several recent issues are creating a strain on time and resources. There is a growing need for managers to manage and be present. They should notify him of any issues and provide recommendations, but also know the core issues of what needs to be done. We must continue to operate under all policies and guidelines and maintain our standing as an honest agency based on integrity and commitment to those we serve.

## Outcomes, Inc. In-Home Performance Review

**Employee Name:**

**Job Title:**

**Program/Department: In Home**

**Supervisor:**

**Review Type:** Choose an item.

**Review Period:**

**Anniversary Date:**

**Date of Review/Writer:**

**A. Fulfills responsibilities and commitments**

Exceeds Expectations- 3pts	<input type="checkbox"/> Meets Expectations- 2pts	<input type="checkbox"/> Does Not Meet Expectations- 0 points
<ul style="list-style-type: none"> <li>● Starts and ends shift according to plan.</li> <li>● Completes assignments/shifts according to schedule.</li> <li>● Documentation conveys correct and descriptive view of client actions and is consistently submitted on time.</li> <li>● Follows Outcomes, Inc. policies and procedures (Including consistent time sheet submission by due date, and timely completion of all training).</li> <li>● Communication: Consistently replies to supervisor promptly (24 hrs. or less). Informs supervisor of any/all changes, irregularities, or notable incidents involving shift, client, or outcome implementation.</li> </ul>	<ul style="list-style-type: none"> <li>● Attendance is good with 3 or less attendance violations.</li> <li>● Assignments/shifts completed according to schedule, with 3 or less supervisor consultations.</li> <li>● Documentation is completed, but inconsistently submitted on time, and/or is not fully descriptive.</li> <li>● Follows Outcomes, Inc. policies and procedures with 3 or less supervisor consultations (including time sheets and training).</li> <li>● 3 or less reminders to reply/communicate to supervisor as expected.</li> </ul>	<ul style="list-style-type: none"> <li>● 3+ attendance violations.</li> <li>● 3+ supervisor consultations for incomplete shifts/unexcused absences/failure to notify.</li> <li>● Documentation is often submitted late and/or is lacking required data.</li> <li>● 3+ supervisor consultations related to Outcomes, Inc. policies and procedures violations (including timesheets and training).</li> <li>● 3+ reminders to reply/communicate to supervisor as expected.</li> </ul>

**What you do well:**

**Previous review (date)**

**Current:**

**Where you can improve:**

**Previous review (date):**

**Current:**

**B. Client Engagement**

<p>Exceeds Expectations- 3pts</p> <ul style="list-style-type: none"> <li>• Participates in client activities.</li> <li>• Engages clients in service outcomes consistently.</li> <li>• Consistently: Uses positive supports, approaches clients with person-centeredness/respect, supports independence &amp; self-direction.</li> <li>• Consistently: Uses cues appropriately, uses community resources, accurately identifies client's strengths and preferences, uses effective support techniques.</li> </ul>	<p><input type="checkbox"/> Meets Expectations- 2pts</p> <ul style="list-style-type: none"> <li>• Needs some direction to participate in client activities. 3 or less supervisor consultations.</li> <li>• Engaging clients in service outcomes is good with 3 or less supervisor consultations.</li> <li>• Uses positive supports/person-centeredness with 3 or less supervisor consultations.</li> <li>• Inconsistency with proper cueing, technique, resources. May lack full knowledge of client's attributes. 3 or less consultations.</li> </ul>	<p><input type="checkbox"/> Does Not Meet Expectations- 0 points</p> <ul style="list-style-type: none"> <li>• Does not participate with client. 3+ supervisor consultations regarding participation.</li> <li>• Does not follow service outcome plans. Blames client behavior as reason not to implement service outcome(s), or give other invalid reasons. 3+ supervisor consultations.</li> <li>• Use of positive supports/person-centeredness is lacking or absent. 3+ supervisor consultations.</li> <li>• Effective cueing or technique is lacking or absent. Unfamiliar with, or indifferent to, client's needs, preferences. 3+ supervisor consultations.</li> </ul>
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**What you do well:**

**Previous review (date):**

**Current:**

**Where you can improve:**

**Previous review (date):**

**Current:**

**Overall Performance Rating**

- Exceeds Expectations
- Meets Expectations
- Does Not Meet Expectations

**Employer's note:**

**Employee Comments:**

**Review of last year's goal:**

**Goal:**

**Achievement/progress:**

**SMART Goal to Accomplish Next Review Period:**

(SMART=Specific, Measurable, Achievable, Relevant, Time-Based)

When developing your goal, please answer the following questions:

<b>Specific:</b> What exactly will you accomplish?	
<b>Measurable:</b> How will you know when you have reached your goal?	

***If you need help achieving your goal, please ask and we will help.***

**Signatures:**

	<b>Signature</b>	<b>Title</b>	<b>Date</b>
<b>Rated by:</b>			
<b>Reviewed by:</b>			
<b>Approved by:</b>			
<b>Employee</b> – I have been given a copy of this report and it has been discussed with me.			

## Performance Review

Areas to be reviewed:

1. **Training** – was LMS completed on time? Were reminders needed? Was additional training required with supervisor (for performance issues)? Did staff show improvement or require additional trainings?
2. **Documentation** – Are log notes thorough and written professionally? Are they turned in on time? Is the data collected making sense with the outcome statement (meeting frequency, appropriate prompt levels, etc.)? Are notes taken correctly on UKG?
3. **Communication** – response time with supervisor. Any complaints regarding communication from legal guardian or client (professionalism)? Communication with LG and client regarding cancelations or late starts. Initiating communication with supervisor when needed/asking questions/asking for more data sheets/etc.
4. **Attendance** – number of cancelations of scheduled shifts. Does staff work to reschedule their shifts? Late cancellations? Are cancellations for a valid reason? Clocking in and out on time. Not going into unnecessary/unapproved overtime (Residential).
5. **Client Interaction** – person centered, respectful, engaging, encourages independence, creative, appropriate use of prompting, follows IAPP/SMA, feedback

Have section for comments after each category. Give specific examples of staff performance in each.

Have a scale for each area. This gives a way to show improvement. Also gives a way to describe what would be needed to reach the next step/point on the scale.

Not Met 1 2 3

Met 4 5 6

Exceed 7 8 9

Add up the number in each area for a total score on which raises will be based.

\*I like the idea of having a personal (professional) goal but I think it will be tricky for in-home DSPs who do their shift and are done (are in and out). DCs and residential DSPs have more time to develop extra activities. A regular in-home DSP doesn't have additional resources or paid time outside of the shift to prepare anything special.