**Family Advocate Performance Appraisal**

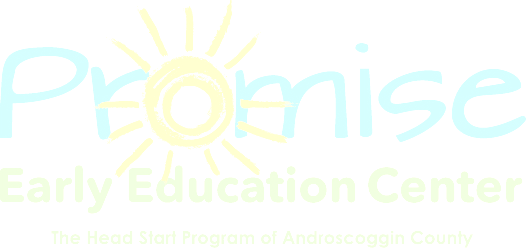
**Date:****Employee Name:**

**Position Title:**

**Supervisor Name:**

**Date of Hire:**

**Date Placed in Current Position:**

**Type of Evaluation (check all that apply)**

**Annual**

**New Assignment**

**Termination**

Needs Development **(ND)** Did not meet performance criteria in at least one aspect of a

particular key Pillar or performance indicator. \**As evidenced by an active Performance Improvement Plan.*

Meets Standards **(MS)** Meets performance criteria in all aspects of a particular key

Pillar or performance indicator

Exceeds Standards **(ES)** Consistently meets expectations in all aspects of a particular key

Pillar or performance indicator, and consistently exceeds expectations in the areas as evidenced by at least two individual and specific examples of exceeding expectations in the evaluation period. \* *This rating requires a minimum of two specific examples in “Comments” Section.*

## **All Agency Pillars:**

**1.Health & Safety**: Follows health and safety policies to support a safe work environment for employees as well as a healthy environment for children and their families. Knowledge of child abuse and neglect policies and procedures. Supports families by giving resources related to health services. Collaborates with families to meet the health requirements for Head Start.

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

**2.Consistency:** Follows established systems and routines in place that ensure consistency in programming across classrooms/sites. Responds in similar manner to like situations to create an environment of predictability for families, children, and other staff members. Reports to work within attendance policy, works a regular schedule, always displays professionalism, and participates in all Agency training events.

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

**3.Best Practice:** Employs best practice which is a method or technique that has been generally accepted as superior to any alternatives because it produces results that are superior to those achieved by other means. It has become a standard way of doing things as related to relevant content areas or areas of work.

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

## **All Agency Performance Indicators**

**1.Customer Service/Building Positive Relationships:** Builds positive working relationships with families, and co-workers.

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

**2.Teamwork:** Active participant contributing to organizational goals. Fosters collaboration and cooperation within immediate team, in working with families, across the Agency, and with community partners. Exhibits positive outlook and attitude.

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.\*

**3.Communication:** Speaks clearly and expresses self respectfully in groups and in one-on-one conversations. Actively listens, comprehends, and ensures effective communication by staying informed, seeking clarity when necessary and ensuring the message is understood by recipient. Demonstrates ability to recognize who needs to be included in the communication loop to ensure all parties are informed as appropriate, while maintaining confidentiality. Able to effectively convey accurate information in formal and informal written formats. Adjusts language and communication style as appropriate depending on audience.

**Comments:**

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

**4.Time Management Skills:** Completes work accurately within specified deadlines. Can appropriately prioritize work and is able to shift priorities when needed. Punches in and out as required, takes lunches when appropriate, and only works overtime when pre-approved by Supervisor. Completes Exception logs appropriately, and forwards to HR within specified time periods.

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/ or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

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**5.Supervision of Staff (if applicable):** Supports and directs staff to achieve and perform to maximum capacity. Advises and gives direction as needed. Has ability to communicate accurate information to subordinates in a concrete and positive manner. Supports staff in professional growth through continued coaching, training, and suggestions for professional development. Conducts at a minimum monthly Supervision and maintains appropriate documentation regarding content of meetings. Monitors and holds staff accountable to policies and procedures as outlined in the operations manual and supports goals and professional growth expectations.

**Comments:**

**ND** Inconsistent adherence to systems and policies related to Pillar and/or inconsistently holds direct reports and/or visitors accountable to pillar as evidenced by a performance improvement plan. \**As evidenced by an active Performance Improvement Plan (PIP).*

**MS** Consistently adheres to all systems and policies related to Pillar and holds direct reports and/or visitors accountable to pillar.

**ES** Meets Expectations in all areas outlined AND, takes a proactive approach and anticipates concerns before they occur, seeks to improve systems by making recommendations to Leadership, embraces change and acts as leader in implementing new and improved systems, acts as leader to peers in said responsibility area or indicator, is a creative problem solver. \* *This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

|  |  |  |
| --- | --- | --- |
| **All Agency Performance Indicators**  (put n/a if not applicable) | **Needs Development** | **Meets Standards** |
| **Attendance** |  |  |
| **Punctuality** |  |  |
| **Personal Appearance (adherence to dress code)** |  |  |
| **Courtesy/Respect** |  |  |
| **Maintains required certifications/credentials** |  |  |
| **Organizational Skills** |  |  |
| **Confidentiality** |  |  |
| **Recruitment Hours Complete** |  |  |
| **Knowledgeable about community resources**  **and/or knows where to seek information out** |  |  |

**Family Advocate Expectations Performance Indicators**

**Goals:** Creates meaningful and obtainable Goals with families related directly to their specific needs and supports family self- sufficiently. Regularly follows up with parents regarding goals and provides support and resources to facilitate the completion of goals. Supports families by giving resources related to health services. Collaborates with families to meet the health requirements for Head Start.

**ND** Documentation of family contact, home visits - minimal input by parent into goals and objectives for their child

**MS** Documentation of family, responds to families in crisis, on-going non-emergency contacts noted, and evidence of discussion in development of health and family goals above

**ES** All of the above plus documentation that staff has completed the circle around follow up to include parent Input, Family Engagement activities. Documentation that staff communicates w/ the team to seek participation in goal setting and referral. \**This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

**Organizational Skills:** Filing and documentation in Child Plus is completed with accuracy and in a timely manner. Work is organized in a way that it is quickly and easily accessible. Effectively utilizes the resources available in ChildPlus reporting to enhance the organization of data.

**ND** Has difficulty or needs prompting in arranging activities in a logical and efficient manner.

**MS** Is logical and efficient and uses resources, time, money and materials productively and prioritizes well.

**ES** Prioritizes and can effectively produce appropriate materials and reports upon request. Is proactive with regard to work tasks and can anticipate future needs. \*This rating requires a minimum of two specific examples that have taken place during the evaluation period.

**Comments:**

**Enrollment:** Supports parents by outlining program expectations including Attendance, Parent Handbook, emergency paperwork, home visits, show evidence of the foundations of family partnership agreements (Family wellness profile, family circle activity, home safety checklists), etc. Actively recruits siblings and pregnant mom’s for programming. Explains the transition process from program option to program option and from Head Start to Kindergarten.

**ND** Knowledge of the documents needed to facilitate the initial Home Visit. Incomplete documentation and distribution of paperwork, not always timely follow thru.

**MS** Share the steps with the family so parents have expectations of the Home Visit and document complete information as well as distribution of paperwork. Initiate transfer requests with appropriate documentation.

**ES** Plan for the child and family from the information shared during the initial Home Visit (ex. Medication, allergy,

special needs, health, etc.). \*This rating requires a minimum of two specific examples that have taken place during the evaluation period.

**Comments:**

**Attendance Monitoring and Problem Solving**: Ensures families are aware of attendance expectations and provides education to parents regarding the importance of child attendance. Continually monitors child attendance and addresses with family when attendance drops below agency expectations. Completed Attendance Success Plans with families who may need support around attendance.

**ND** Does not communicate effectively with parents and does not adequately monitor child attendance.

**MS** Reviews information provided in Parent Handbook at initial home visit, reinforces at Open House. Identifies each child’s average attendance on a monthly basis. Works with family to meet attendance expectations.

**ES** Documents problem solving evidenced by Attendance Success Plans, with plans and results documented. Uses Family Partnership process to support attendance expectations. Documents results. \**This rating requires a minimum of two specific examples that have taken place during the evaluation period.*

**Comments:**

## **Overall Evaluation**

**(This is calculated by which category has the majority of rankings)**

|  |  |
| --- | --- |
|  | **Needs Development (ND)** |
|  | **Meets Expectations (ME)** |
|  | **Exceeds Standards (ES)** |

**In reviewing the overall performance of the employee, Summarize their greatest strengths, as well as the various areas needing improvement.**

# Employee Comments and Signature

**Employee may comment on all or any part of the information contained in this document, including the evaluation process. This may include suggestions or ideas for improvement in the agency. If employee does not concur with the evaluation, check the appropriate box and explain reasons for disagreement.**

**I understand my job responsibilities performance expectations, and the terms and conditions under which I am expected to work.**

**I,(Do) Concur with my supervisor’s evaluation. Do Not) Concur with my supervisor’s evaluation.**

**Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Manager/Director Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Executive Director Initials: \_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |
| --- |
| **Performance Goals**  Goals are to be developed by the supervisor and the employee together with input from Coaches and Content managers. Goals should be created using the SMART Goal Criteria in that they should be: Specific, Measurable, Attainable, Realistic, and have a time frame associated with them. At least two goals should be related the employees professional development (gaining skill/knowledge in employees area of expertise) and one related to their performance (communication, customer service, team work, etc)  **Previous Year Goal Progress**  **Goal 1: Previous Year:**  **Goal Met: Yes No**  **Goal 2: Previous Year:**  **Goal Met: Yes No**  **Goal 3: Previous Year:**    **Goal Met: Yes  No** |

## **New Goals to work on in the coming year:**

Goals are to be developed by the supervisor and the employee together with input from Coaches and Content managers. Goals should be created using the SMART Goal Criteria in that they should be: Specific, Measurable, Attainable, Realistic, and have a time frame associated with them. At least two goals should be related the employees professional development (gaining skill/knowledge in employees area of expertise) and one related to their performance (communication, customer service, team work, etc)

**Specific, Attainable and Realistic Goal**

**Goal 1 (Professional Development)**

**Due Date**

## **Goal 2 (Professional Development)**

**Due Date**

## **Goal 3 (Performance Related)**

**Due Date**

**Reviewed and discussed with supervisor:**

**Supervisor’s Signature**  **Date**

**Copy to: Human Resources**

**Annual Training Plan**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Name: |  | | | Supervisor: |  | | |
| Position: |  | Location: |  | | | Year: |  |

**Scheduled Trainings**

|  |  |  |  |
| --- | --- | --- | --- |
| Training | Hours | Target Completion Date | Actual Completion Date |
| Required Trainings: |  |  |  |
| Safety Care (annual) | 8 |  |  |
| Mandated Reporting (annual) | 1.5 |  |  |
| Sexual Harassment (annual) | .5 |  |  |
| Licensing Guidelines (annual) | 1 |  |  |
| Blood Born Pathogens (annual) | .5 |  |  |
| MRTQ Health & Safety Renewal (annual) | 2 |  |  |
| ERSEA | .5 |  |  |
| MED 101 (annual) | 1 |  |  |
| Inservice- (4 per year) | 10 |  |  |
| Bed Bugs (annual) | .5 |  |  |
| Estimated Total | 25.5 |  |  |
|  |  |  |  |
| CPR/First Aid (bi-annual) 8 hrs | 8 |  |  |
| Estimated Total w/CPR – 33.5 hours | 33.5 hours |  |  |
|  |  |  |  |
| Additional Trainings: |  |  |  |
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| Grand Total |  |  |  |