

Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

Following is a comprehensive overview of the proposed process for evaluating the performance of KCH staff. The model presented is a custom model tailored to the specific needs of the Kalamazoo Collective Housing organization (KCH). It is a combination of varied common models, methods and practices. The method and process below described applies in all direct report cases (e.g. the Executive Director to the Board of Directors, KCH staff to the Executive Director). The Evaluation Committee submit\ this proposal, along with the supporting policy and forms for approval by the KCH Board of Directors (BOD).

In developing a custom process for KCH, the Evaluation Committee (EV team) considered some of the most common methods for evaluation. The four methods that seemed best to fit the KCH culture were 360° Feedback, Self-Evaluation, Quantitative Objects and Rating Scales. The EV team combined these methods and introduced Core Objectives to arrive at a model that meets the needs of KCH.

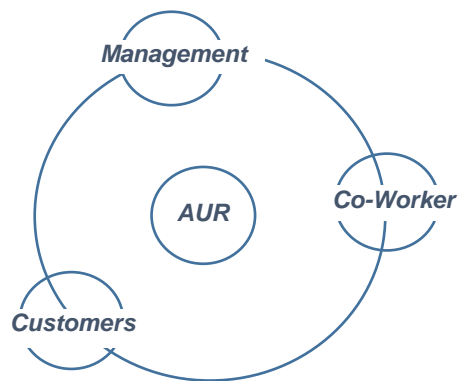
To begin, let's look at models incorporated within the proposed evaluation process.

## MODELS

### **360° Feedback**

The 360° model is a way of providing anonymous feedback from all potential working relationships. All persons surrounding the Associate/Employee Under Review (AUR) would provide feedback in reference to the AUR's performance. The data from the feedback surveys are gathered and compiled in order to provide an evaluation for the AUR. This method encourages the AUR to enhance their interpersonal relation, leadership, occupational and collaboration skills within the organization.

The EV team felt that a beneficial component of the evaluation process of KCH staff would be to assess the staff member's interactions with fellow KCH staff members, the KCH membership, the KCH Board of Directors (BOD) and outside agencies. The EV team believes that such an assessment would foster greater, stronger working relations.



Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

**Self-Evaluation**

The Self-Evaluation model requires the AUR to judge their performance based on pre-determined criteria. This method allows the AUR to play an active role in the performance plan and evaluation process. Here the AUR is given a voice and thus allows for greater communication between management and the AUR. Additionally, this method encourages the AUR to incessantly evaluate themselves throughout the year, leading to the maximum achievement of the organization's goals.

In considering this model, the EV team felt it was important to include the staff in the development of the performance plan. Using the Self-Evaluation model allows for greater growth by taking into account the experience, understanding and perspective of the staff. Additionally, the EV team felt that this method allows for the greatest amount of freedom to accomplish pre-determined goals.

**Quantitative Objectives**

With the Quantitative Objectives (or Deliverables) model, Management and the AUR agree upon specific, measureable and obtainable objectives with a set deadline. This model allows for greater and specific directives to the AUR in order to ensure that the will of management is executed as expected.

Quantitative Objectives are important in management. There are times when management expects that a task will be completed and certain standards met by a given time. For this reason, the EV team felt it necessary to allow for and include this section as a part of the KCH evaluation process.

**Rating Scales**

The ratings scale (or grading scale) model is probably the most commonly used method. This method judges the AUR against a set of predefined criteria. Each criterion is assigned a numerical value (usually on scale of 1 to 5). This method is noted for being simple and functional.

A key factor of the evaluation process is to provide meaningful and clear feedback to the AUR while also providing the AUR with a concrete feel of their performance. The rating scale model immediately brings to focus areas of concern and areas of progress, in the eyes of Management, for the AUR. The EV team believes that instituting an overall rating system is the most efficient and clear way to provide meaning full feedback to the AUR.

Using the above models, the EV team has developed a Personal Performance and Evaluation Plan containing three sections: 360° Feedback, Self-Evaluation and Quantitative Objectives. Over which, the team applied a weighted Rating Scale to each section to provide measured feedback to the AUR and a final overall rating to be used as a basis for Management action (e.g. discipline or merit increases). We will now examine

Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

each of the sections detailing the development of the content of the section and the method of evaluation.

## PERFORMANCE PLAN & EVALUATION

### Section I - 360° Feedback

The 360° section is the collection of feedback in reference to the AUR via anonymous surveys. The section focuses on any or all of the work relationships of the AUR. In the case of the Executive Director, as the AUR, the BOD would choose from any number of relationships. For example, relationships with...

KCH Membership  
The KCH Board of Directors  
KCH Staff  
NASCO Properties  
Other Outside Organizations  
And more

At the beginning of the evaluation period, the BOD will establish relationships of concern. Then, the BOD (together with the Executive Director if deemed reasonable by the BOD) will determine areas of importance within each relationship and create a set of survey questions to assess those areas. This is done at the beginning of the term so that AUR is fully aware of the questions that will be asked, thereby allowing the AUR to remain cognizant of their behavior, within these relationships, throughout the duration of the evaluation period.

For this example, let's assume that the BOD wants to make sure that ED will maintain professionalism with the KCH Membership and that the ED will act in a consistent and fair manner when dealing with KCH Members. Then, the BOD might establish the following relationship for evaluation and use the indicated questions to assess the relationship.

KCH Membership (← the relationship)

- 1.) Does the Executive Director act in a consistent and fair manner?
- 2.) Does the act in a professional, respectful and polite manner?

Further, let's assume that the BOD wants make sure that the ED will be consistently supportive of the BOD members and keep them fully informed. Thus, the BOD might establish the KCH Board of Directors relationship for evaluation and use the indicated questions to assess the ED.

KCH Board of Directors (← the relationship)

- 1.) Does the Executive Director appropriately provide support to the BOD?
- 2.) Does the Executive Director assure that the BOD is kept fully informed, in a timely way, on the condition of the organization?

Kalamazoo Collective Housing  
 Personal Performance and Evaluation Plan for All KCH Staff  
 PROPOSAL

At the end of the evaluation period, the BOD will provide KCH Members and the KCH BOD with the opportunity to complete an anonymous survey wherein they would rate the ED on each question using a scale of 1 to 5 (with 5 being the best outcome) and, optionally, provide additional feedback for the ED. See the following example.

*On a scale of 1 to 5, with 5 being the best or positive outcome and 1 being the negative, please rate the following comments.*

<b>QUESTION 1</b>	<b>RATING</b>
Does the Executive Director act in a consistent and fair manner?	1   2   3   4   5
<i>Optional - use this space to provide additional feedback on the rating given.</i>	
<b>QUESTION 2</b>	<b>RATING</b>
Does the Executive Director consistently act in a professional, respectful and polite manner?	1   2   3   4   5
<i>Optional - use this space to provide additional feedback on the rating given.</i>	

**Section II – Self-Evaluation**

The Self-Evaluation section requires the AUR to provide a written appraisal of their work and performance judged against pre-determined criteria. The components of this section are also determined at the beginning of the evaluation period. Management and the AUR work together to establish Core Objectives (i.e. pre-determined criteria) that will guide the AUR throughout the evaluation period.

Core Objectives (CO) (also referred to as Core Competencies) are overarching focal points established by Management and the AUR. COs are areas, tasks, goals, character points, etc. where focus will be placed for the duration of the evaluation period. Some common COs are Attention to Detail, Innovation, Planning and Organizing and Team Work. There are numerous more. However, the main idea is that the CO is where management would like the AUR to focus their attention throughout the evaluation period. For KCH in particular, some COs might be Grant Writing, Fundraising, Building Culture, Business Finance and Planning, and Solidifying the KCH Framework.

A properly written CO will list the focus point (e.g. Grant Writing) and then bullet points describing what management would expect to see as a result of focus on this point. See the below example.

- GRANT WRITING (← a desired focus for the year)
- Participates in grant/proposal writing education (← list of expected results)
  - Researches and presents viable grants to the BOD
  - Prepares and submits grant and funding proposals

Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

- Clarifies, standardizes and documents the KCH grant writing requirements, norms and processes
- Gains capital and operation funds via grants

Once management and the AUR have established COs, the COs are added to the self-evaluation section of the Personal Performance and Evaluation Plan. The AUR will then work toward meeting the list of expected results throughout the evaluation period. In this section, the how, when, where, etc. is left to the discretion of the AUR. At the end of the evaluation period, prior to management review, the AUR will provide a detailed self-evaluation, indicating the efforts taken and results achieved, for each CO. In addition to the comprehensive self-evaluation, the AUR will rate their overall success, for each CO, on a scale from 1 to 5 with 1 being “fails to meet expectations” and 5 being “far exceeds expectations.”

### **Section III – Quantitative Objectives**

The Quantitative Objectives (QO) section is where Management lists expected results from the AUR. QOs must be obtainable, measureable and have a set deadline. QOs, are also set at the beginning of the evaluation period, but are commonly added throughout the evaluation period as deemed necessary by management. QOs can be as specific and detailed as needed. In short, QAs are a list of tasks to which the AUR will be held accountable. Following are two examples of a QO.

Quantitative Objective I

ANNUAL BUDGET DRAFT

- Submit a revised and complete budget draft, for the 2018-2019 fiscal year, to the Board of Directors no later than May 1, 2018.

Quantitative Objective II

FINANCE

- Acquire no “late payment” fees throughout the 2018-2019 fiscal year. Provide detailed accounting of all fees paid, with explanation, to the Board of Directors by the 15<sup>th</sup> of every month and a final reporting for the end of the fiscal year by July 15, 2018.
- Submit a listing of deposits received from the previous eight (8) days to the Board of Directors, every Monday, by 4:00 PM EST. Provide a detailed accounting of deposits, to the Board of Directors, by the 1<sup>st</sup> of every month.
- Submit expense reports daily by 4:00 PM EST. Provide a detailed accounting of report submissions, to the Board of Directors by the 1<sup>st</sup> of every month.

Once QOs have been established by management, they are added to section three. At the end of the evaluation period the AUR will be evaluated on the completion of each task as indicated and rated on a scale of 1 to 5 for each Objective.

1 – rarely meets expectations

2 – somewhat meets expectations

Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

- 3 – meets expectations
- 4 – exceeds expectations
- 5 – far exceeds expectations

The next piece that the EV team addresses in this proposal is scoring the evaluation. However, we'd like to highlight a few points that we feel are vital to understanding the proposed plan thus far.

- This model provides a road map for the year, giving the AUR clear goals and objectives.
- This model is flexible. It can be as broad or as detailed as deemed necessary. At any time, either management or the AUR can request a review of the Personal Performance and Evaluation Plan for possible changes.
- The model is designed for active participation by both management and the AUR. While management may unilaterally establish the 360° Feedback, the Core Objectives of the Self-Evaluation Section and the Quantitative Objects, we emphasize that best results work when both management and the AUR work together to establish the content of the Personal Performance and Evaluation Plan.
- This model can be used for all performance evaluations of KCH.

## SCORING

Providing scores and feedback is crucial to the evaluation process. Giving a meaningful score helps to highlight areas of progress and areas in need of improvement. The EV team proposes an overall scoring process wherein each goal is given a rating from 1 to 5 (with 5 being the best possible outcome). Each section is then averaged and the final score is a weighted average from each section. For clarity, we will review the process for scoring in each section and then provide demonstration for the final weighted outcome.

### **Scoring the 360° Feedback**

In this section, each question on the anonymous survey receives a rating from 1 to 5. Each member of the relationship group rates each question. The ratings for each question are added together and then divided by the total number of submissions for that question.

For instance, for Question 1 of our earlier example, we would ask this question to all 28 KCH members. Let's say that 20 of our 28 members respond with a rating for this question. Then, we would add the rating given by each of the 20 members and then divide that number by 20. We will continue in this fashion for all questions of the relation group. Once we have an average for each question, we will add together the final averaged score of each question and divide that total by the

Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

number of questions asked. This will give us an overall score for the relationship group. See the below example, where we've asked 2 questions to all 28 members of KCH. We assume that all 28 members responded to each question.

RELATIONSHIP - KCH MEMBERSHIP				RELATIONSHIP RATING	OVERALL SECTION RATING
<b>QUESTION 1</b>	<b>QUESTION RATING</b>			Averaged score from all questions in the relationship <b>3.5</b>	Averaged score from all relationships  <b>3.25</b>
Does the Executive Director act in a consistent and fair manner?	Averaged score from all submissions. 1 2 <b>3</b> 4 5				
<b>QUESTION 2</b>	<b>RATING</b>				
Does the Executive Director consistently act in a professional, respectful and polite manner?	Averaged score from all submissions. 1 2 3 <b>4</b> 5				
RELATIONSHIP - KCH BOARD OF DIRECTORS				FINAL RATING	
<b>QUESTION 1</b>	<b>RATING</b>			Averaged score from all questions in the relationship <b>3.0</b>	
Does the Executive Director deal consistently among all members of the BOD?	Averaged score from all submissions. 1 2 3 <b>4</b> 5				
<b>QUESTION 2</b>	<b>RATING</b>				
Does the Executive Director assure that the BOD is kept fully informed, in a timely way, on the condition of the organization and important factors influencing it?	Averaged score from all submissions. 1 <b>2</b> 3 4 5				

The final score for Section I - 360° Feedback is 3.25, which falls just above the “Meets Expectations” range. But, this method also highlights areas for improvement. Additionally, any optional comments provided by relationship members would be included for review.

**Scoring the Core Objectives of the Self-Evaluation**

In this section, the AUR provides a detailed listing of efforts and results taken to achieve the CO. In addition to the comprehensive written review, the AUR also provides a rated score in reference to their achievement of the CO.

Once the AUR submits their self-evaluation to management, management reviews the evaluation and determines the final rating for each CO. The numerical rating provided by the AUR is considered, but not used in the calculation of the final rating of the CO. However, if management is inclined to give a numerical rating of less than 3 or a numerical rating that would be lower than the AUR’s rating by two points (e.g. the AUR gives a rating of 4 and management believes the rating should be 2), management must provide a rational for their decision.

After each CO has been rated, the scores from each CO are added together and divided by the total number of COs to obtain and final averaged score for the section. See the below example where two COs are rated.

Kalamazoo Collective Housing  
 Personal Performance and Evaluation Plan for All KCH Staff  
 PROPOSAL

<b>CORE OBJECTIVE I</b>		
<b>GRANT WRITING</b> (<-- a desired focus for the year) <ul style="list-style-type: none"> <li>· Participates in grant/proposal writing education (β list of expected results)</li> <li>· Researches and presents viable grants to the BOD</li> <li>· Prepares and submits grant and funding proposals</li> <li>· Clarifies, standardizes and documents the KCH grant writing requirements, norms and processes</li> <li>· Gains capital and operation funds via grants</li> </ul>		
<b>Self-Evaluation</b>	<b>SELF-RATING</b>	<b>FINAL</b>
Attended 2018 Not-for-Profit Grant writing seminar. Researched and identified 23 applicable grants in line with the organization. Applied for 18 of the 23 grants and received funding from 6 garnering \$45,000.00 in grant monies for the organization. This is a 23% increase from the last fiscal year. Additionally, began documentation process to help stream line future applications.	1   2 <b>3</b> 4   5	<b>3.5</b>
<b>Leader Evaluation</b>	<b>LEADER RATING</b>	
	1   2   3 <b>4</b> 5	
<b>CORE OBJECTIVE II</b>		
<b>ATTENTION TO DETAIL</b> (<-- a desired focus for the year) <ul style="list-style-type: none"> <li>· handles details meticulously and makes very few mistakes</li> <li>· checks his/her own work and focuses on details</li> <li>· readily recognizes contradictions in detailed information</li> <li>· develops ideas thoroughly and meticulously into an effective plan of action</li> <li>· devises systems to monitor and control detailed information adequately</li> <li>· readily detects inconsistencies in reports, budgets et cetera</li> <li>· recognizes details in behavior and data that are relevant to a certain pattern</li> </ul>		
<b>Self-Evaluation</b>	<b>SELF-RATING</b>	<b>FINAL</b>
Evaluated all financial records for the 2018-2019 fiscal year. Established policies and routines to identify clerical and neglagent errors in reporting. Monitored the number of errors experienced and made consistent improvement over the year (see attached data), making an overall improvement of 80% accuracy.	1   2 <b>3</b> 4   5	<b>2.5</b>
<b>Leader Evaluation</b>	<b>LEADER RATING</b>	
There have been significant improvements in this area, but we have a ways to go. There were a number of errors found throughout since the last review and in particular, two errors (Fletcher interest rate change and Meristem cost analysis) resulted in a \$3,000.00 expense to the organization.	1 <b>2</b> 3   4   5	
<b>OVERALL SECTION RATING</b>		
<b>3.0</b>		



Kalamazoo Collective Housing  
 Personal Performance and Evaluation Plan for All KCH Staff  
 PROPOSAL

**Scoring the Quantitative Objectives**

In this section, management provides a rating based on empirical data measured against the expected results for each QO, for the AUR. Once a final score has been determined for each QO, all QO scores are added together and divided by the total number of QOs to provide a final section rating. Any ratings given by management that are below the numerical value of 3 (i.e. meets expectations), must be accompanied by a rational for the decision. See the below example for scoring this section

<b>QUANTITATIVE OBJECTIVE I</b>	
ANNUAL BUDGET DRAFT <ul style="list-style-type: none"> <li>· Submit a revised and complete budget draft, for the 2018-2019 fiscal year, to the Board of Directors no later than May 1, 2018.</li> </ul>	
<b>Leader Evaluation</b>	<b>RATING</b>
Full and complete budget submitted April 15, 2018.	1 2 <b>3</b> 4 5
<b>QUANTITATIVE OBJECTIVE II</b>	
FINANCE <ul style="list-style-type: none"> <li>· Acquire no "late payment" fees throughout the 2018-2019 fiscal year. Provide detailed accounting of all fees paid,</li> <li>· Submit a listing of deposits received from the previous eight (8) days to the Board of Directors, every Monday, by</li> <li>· Submit expense reports daily by 4:00 PM EST. Provide a detailed accounting of report submissions, to the Board of Directors by the 1st of every month.</li> </ul>	
<b>Leader Evaluation</b>	<b>RATING</b>
All objectives meet as expected. Additionally, AUR developed new systems to streamline all financial reporting which resulted in 100%, on-time actions since the last review. The AUR also submitted full documentation of the process and procedures of this system and provided training to the Board of Directors.	1 2 3 4 <b>5</b>
<b>OVERALL SECTION RATING</b>	
<b>4.0</b>	

Now that we have scored each section, we can calculate a weighted average final score. The EV team encourages the use of the weighted system and has incorporated it within this model as the team believes it will provide for greater flexibility to place focus on a particular section or component.

For example, if the BOD determines that focus should be placed on the relationships of the ED with others, then perhaps the weighted values might be as follows.

- 360° Feedback – 40%
- Core Objectives – 30%
- Quantitative Objectives – 30%

Or perhaps the BOD would like to place emphasis on the Core Objectives, then the breakdown might be as follows.

Kalamazoo Collective Housing  
 Personal Performance and Evaluation Plan for All KCH Staff  
 PROPOSAL

360° Feedback – 20%  
 Core Objectives – 50%  
 Quantitative Objectives – 30%

**Final Scoring**

Once the BOD has determined the weight percentages, the final score can be calculated. The weighted percentages, like all areas of the, are determined at the beginning of the evaluation period. Of course, just like all areas, those percentages can be adjusted as deemed necessary. See the below diagram for illustration of calculating the final score with weighted averages.

<b>FINAL SCORING</b>		
<b>360 ° FEEDBACK</b>	<b>WEIGHTED %</b>	<b>WEIGHTED RATING</b>
<b>3.25</b>	<b>20%</b>	Multiply 360 score by weighted % (.2) <b>0.65</b>
<b>CORE OBJECTIVES</b>	<b>WEIGHTED %</b>	<b>WEIGHTED RATING</b>
<b>3.00</b>	<b>50%</b>	Multiply CO score by weighted % (.5) <b>1.50</b>
<b>QUANTITATIVE OBJECTIVES</b>	<b>WEIGHTED %</b>	<b>WEIGHTED RATING</b>
<b>4.00</b>	<b>30%</b>	Multiply QO score by weighted % (.3) <b>1.20</b>
<b>FINAL EVALUATION SCORE</b> Calculated by adding all of the weighted ratings <b>3.35</b>		

**MERIT INCREASE**

The last consideration of this proposal is determining how the Final Evaluation Score translates to a merit increase (i.e. salary raise) for the AUR.

The EV team begins with a base understanding that any AUR with a Final Evaluation Score (FES) below a numerical value of 2.5 (i.e. falling at or below the “somewhat/sometimes meets expectations” mark) will not be eligible for a merit increase. We then consider that the standard numerical score of 3 (i.e. meets expectations) merits an increase equal to the inflation rate as calculated over the previous 12 months. Then, the merit increase rises and falls corresponding to the FES above or below the numerical value of 3. For example, if the AUR received a FES of 3.35, then we would find the amount of increase by taking the  $FES - 3 = .35$ . Then, the base merit increase would be the Inflation Rate + .35.

Once we have a base merit increase, this amount is decreased or increased based on the current budgetary allowance. The budgetary allowance (i.e. +/- % that the BOD will add to merits based on budgetary constraints) is determined prior to evaluations. Thus, if the organization is financially able, AUR could see an increase to the base merit amount. But, in years where the budget doesn’t allow for significant increase, there could be a reduction to the base merit rate. See the following table detailing calculated merit raises.

Kalamazoo Collective Housing  
 Personal Performance and Evaluation Plan for All KCH Staff  
 PROPOSAL

Rate Calculation for FES of 3.00 and positive budgetary allowance						
Rate of Inflation	Final Evaluation Score	Base FES Score	Amount Added to Rate of Inflation*	Base Increase	Budget Allowance +/-	Final Merit Increase
2.50	3.00	3	0	2.50%	1.00%	3.50%
2.67	3.00	3	0	2.67%	1.00%	3.67%
3.10	3.00	3	0	3.10%	1.00%	4.10%
*FES - Base FES = Amount Added to Rate of Inflation						
Rate Calculation for FES of 3.35 and negative budgetary allowance						
Rate of Inflation	Final Evaluation Score	Base FES Score	Amount Added to Rate of Inflation	Base Increase	Budget Allowance +/-	Final Merit Increase
2.50	3.35	3	0.35	2.85%	-1.50%	1.35%
2.67	3.35	3	0.35	3.02%	-1.50%	1.52%
3.10	3.35	3	0.35	3.45%	-1.50%	1.95%
*FES - Base FES = Amount Added to Rate of Inflation						
Rate Calculation for FES of 2.60 and no budgetary allowance						
Rate of Inflation	Final Evaluation Score	Base FES Score	Amount Added to Rate of Inflation	Base Increase	Budget Allowance +/-	Final Merit Increase
2.50	2.60	3	-0.4	2.10%	0.00%	2.10%
2.67	2.60	3	-0.4	2.27%	0.00%	2.27%
3.10	2.60	3	-0.4	2.70%	0.00%	2.70%
*FES - Base FES = Amount Added to Rate of Inflation						
Rate Calculation for FES of 4.00 and negative budgetary allowance						
Rate of Inflation	Final Evaluation Score	Base FES Score	Amount Added to Rate of Inflation	Base Increase	Budget Allowance +/-	Final Merit Increase
2.50	4.00	3	1	3.50%	-0.50%	3.00%
2.67	4.00	3	1	3.67%	-0.50%	3.17%
3.10	4.00	3	1	4.10%	-0.50%	3.60%
*FES - Base FES = Amount Added to Rate of Inflation						

**SUMMARY**

The EV team believes the above described process to be the most ideal for the KCH organization. The model addresses all areas where the BOD has indicated a need for monitoring and provides substantial flexibility. Additionally, this model focuses on cooperation by encouraging both management and staff to work together to devise a plan

Kalamazoo Collective Housing  
Personal Performance and Evaluation Plan for All KCH Staff  
PROPOSAL

for the achievement of goals thereby fostering greater accountability, ownership and reward. Finally, this model is adaptable and useable for all evaluation needs through the KCH organization.

Thank you,  
KCH Staff Evaluation Committee

Attached to this proposal:

- Standard Personal Performance and Evaluation Form / Template
- Staff Evaluation Policy



# KALAMAZOO COLLECTIVE HOUSING

KALAMAZOO COLLECTIVE HOUSING PERSONAL PERFORMANCE & EVALUATION PLAN		
NAME:	DATE:	
POSITION:	MANAGER:	
EVALUATION PERIOD:	MID-TERM DISCUSSION	FINAL EVALUATION
360° DEGREE FEEDBACK		
RELATIONSHIP GROUP I	INDIVIDUAL QUESTION RATING	OVERALL RELATIONSHIP RATING
Question 1	1 2 3 4 5	(Average of Question Ratings)
Question 2	1 2 3 4 5	
Question 3	1 2 3 4 5	
**Add additional Relationship Groups and Questions as deemed necessary.	1 2 3 4 5	
RELATIONSHIP GROUP II	INDIVIDUAL QUESTION RATING	OVERALL RELATIONSHIP RATING
Question 1	1 2 3 4 5	(Average of Question Ratings)
Question 2	1 2 3 4 5	
Question 3	1 2 3 4 5	
**Add additional Relationship Groups and Questions as deemed necessary.	1 2 3 4 5	
RELATIONSHIP GROUP III	INDIVIDUAL QUESTION RATING	OVERALL RELATIONSHIP RATING
Question 1	1 2 3 4 5	(Average of Question Ratings)
Question 2	1 2 3 4 5	
Question 3	1 2 3 4 5	
**Add additional Relationship Groups and Questions as deemed necessary.	1 2 3 4 5	
OVERALL 360° FEEDBACK RATING		
(Averaged Score from All Relationship Group ratings)		

## CORE OBJECTIVES, COMPENTENCIES & SELF-EVALUATION

### CORE OBJECTIVE I

**Core Objective I Title:** (followed by short definition)

- list item 1 from expected results for the Core Objective
- list item 2 from expected results for the Core Objective
- list item 3 from expected results for the Core Objective

\*\*Add additional Core Objectives and List Items as deemed necessary.

SELF-EVALUATION	SELF-RATING	CORE OBJECTIVE RATING
	1 2 3 4 5	
MANAGEMENT EVALUATION	LEADER RATING	
	1 2 3 4 5	

### CORE OBJECTIVE II

**Core Objective II Title:** (followed by short definition)

- list item 1 from expected results for the Core Objective
- list item 2 from expected results for the Core Objective
- list item 3 from expected results for the Core Objective

\*\*Add additional Core Objectives and List Items as deemed necessary.

SELF-EVALUATION	SELF-RATING	CORE OBJECTIVE RATING
	1 2 3 4 5	
MANAGEMENT EVALUATION	LEADER RATING	
	1 2 3 4 5	

### CORE OBJECTIVE III

**Core Objective III Title:** (followed by short definition)

- list item 1 from expected results for the Core Objective
- list item 2 from expected results for the Core Objective
- list item 3 from expected results for the Core Objective

\*\*Add additional Core Objectives and List Items as deemed necessary.

SELF-EVALUATION	SELF-RATING	CORE OBJECTIVE RATING
	1 2 3 4 5	
MANAGEMENT EVALUATION	LEADER RATING	
	1 2 3 4 5	

### OVERALL CORE OBJECTIVE RATING

(Averaged Score from All Core Objective ratings)

## QUANTITATIVE OBJECTIVES

### QUANTITATIVE OBJECTIVE I

#### Quantitative Objective I Title

- list item 1 from expected measureable results with set deadline
- list item 2 from expected measureable results with set deadline
- list item 3 from expected measureable results with set deadline

\*\*Add additional Quantitative Objectives and List Items as deemed necessary.

MANAGEMENT EVALUATION	QUANTITATIVE OBJECTIVE RATING
	1 2 3 4 5

### QUANTITATIVE OBJECTIVE II

#### Quantitative Objective II Title

- list item 1 from expected measureable results with set deadline
- list item 2 from expected measureable results with set deadline
- list item 3 from expected measureable results with set deadline

\*\*Add additional Quantitative Objectives and List Items as deemed necessary.

MANAGEMENT EVALUATION	QUANTITATIVE OBJECTIVE RATING
	1 2 3 4 5

### QUANTITATIVE OBJECTIVE III

#### Quantitative Objective III Title

- list item 1 from expected measureable results with set deadline
- list item 2 from expected measureable results with set deadline
- list item 3 from expected measureable results with set deadline

\*\*Add additional Quantitative Objectives and List Items as deemed necessary.

MANAGEMENT EVALUATION	QUANTITATIVE OBJECTIVE RATING
	1 2 3 4 5

### QUANTITATIVE OBJECTIVE IV

#### Quantitative Objective IV Title

- list item 1 from expected measureable results with set deadline
- list item 2 from expected measureable results with set deadline
- list item 3 from expected measureable results with set deadline

\*\*Add additional Quantitative Objectives and List Items as deemed necessary.

MANAGEMENT EVALUATION	QUANTITATIVE OBJECTIVE RATING
	1 2 3 4 5

### OVERALL QUANTITATIVE OBJECTIVE RATING

(Averaged Score from All Quantitative Objective ratings)

## FINAL SCORING, MERIT INCREASE & SIGNATURES

### FINAL SCORE CALCULATION

360° FEEDBACK SCORE	WEIGHTED %	WEIGHTED RATING
		(Multiply 360° score by weighted percent)
CORE OBJECTIVES & SELF-EVALUATION SCORE	WEIGHTED %	WEIGHTED RATING
		(Multiply Core Objective score by weighted percent)
QUANTITATIVE OBJECTIVE SCORE	WEIGHTED %	WEIGHTED RATING
		(Multiply Quantitative Objective score by weighted)

### FINAL EVALUATION SCORE (FES)

Calculated by adding the three Weighted Ratings.

### MERIT INCREASE CALCULATION

INFLATION RATE	FINAL EVALUATION SCORE	AMOUNT ADDED TO DEDUCTED FROM THE RATE OF INFLATION	BASE MERIT INCREASE	+/- BUDGETARY ALLOWANCE
(Rate based on previous 12 month cycle)		(= FES - Base FES of 3.00)	(=FES + Amount Added)	(Pre-determined % by the Board of Directors)

### FINAL MERIT INCREASE

Calculated by adding the Base Merit Increase and the Budgetary Allowance

### ACKNOWLEDGEMENT AND SIGNATURES

#### MANAGEMENT

PRINTED NAME	SIGNATURE	DATE

#### EMPLOYEE

PRINTED NAME	SIGNATURE	DATE





**TITLE OF POLICY: KCH Personal Performance and Evaluation Plan (PPEP)**

Policy #: **TBD**

Type of Policy: Staff and Personnel

Effective Date: 04/01/2018

Last Revised: New

**REASON FOR POLICY (OR INTRODUCTION)**

The purpose of this policy is to provide an effective performance and evaluation process for the staff of KCH.

**POLICY STATEMENT**

- At the beginning of every fiscal year and prior to August 1<sup>st</sup>, all Managing Staff will meet with all direct reports for the purpose of developing a PPEP for the direct report.
- All Managing Staff shall hold mid-term discussions with their direct reports for the purpose of reviewing their performance and progress as measured against their PPEP.
- Merit increases for all KCH shall be determined by their Final Evaluation Score of their PPEP.
- Prior to the final evaluation of KCH Staff (set to take place between the 1<sup>st</sup> and 30<sup>th</sup> of June), the KCH BOD shall determine the budgetary allowance used to calculate the final merit increase (as stipulated in the Procedures and Processes section below).
- 360° Feedback surveys will be issued by Managing Staff by May 1<sup>st</sup> and collected by May 15<sup>th</sup>.
- All Direct Reports shall submit their Core Objective Self-Evaluations and Quantitative Objectives documentation to their Managing Staff member by May 31<sup>st</sup>.
- Merit increases take effect as of August 15<sup>th</sup>.
- In the case of the Executive Director, each BOD member will complete the Personal Performance and Evaluation Plan. The final scoring for the Core Objective and Quantitative Objective sections will be an average score of all BOD evaluations.

**SCOPE**

Board of Directors

BOD Chair

BOD Secretary

BOD Treasurer

Executive Director

House Officers

All KCH Members

Other: \_\_\_\_\_

Other: All KCH Staff

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

**DEFINITIONS**

<b>1.) Managing Staff</b>	Any KCH Staff member who manages or oversees others in the KCH organization.
<b>2.) Direct Report</b>	Any KCH Staff member who reports or answers to another KCH Staff member.
<b>2.) Budgetary Allowance</b>	A negative or positive increase applied to the base merit rate corresponding to budgetary constraints.

**PROCEDURES AND PROCESSES**

The procedure and process for the Personal Performance and Evaluation Plan are detailed in the attached Evaluation Proposal.

**FORMS**

- Kalamazoo Collective Housing Personal Performance and Evaluation Plan

**RESPONSIBILITIES**

WHO IS RESPONSIBLE	FOR WHICH ASPECT ARE THEY RESPONSIBLE
1.) Board of Directors	The BOD will evaluate the Executive Director on a yearly basis with a mid-term discussion and review of performance. The BOD shall set the budgetary allowance prior to final staff evaluations.
2.) Managing Staff	Managing Staff of KCH will establish and evaluate all direct reports on a yearly basis with a mid-term discussion and review of performance. Managing Staff shall establish weight % for each section of the PPEP for all direct reports.
3.) All KCH Staff	All KCH Staff shall participate in establishing a personal performance and evaluation plan and shall receive an end of year evaluation from their managing staff.

**ENFORCEMENT**

None

**RELATED INFORMATION**

- Staff Evaluation Proposal submitted by the Evaluation committed on 4/1/18

**POLICY REVIEW SCHEDULE AND HISTORY**

Review:  Semi-Annually \_\_\_\_\_  Annually \_\_\_\_\_  Every 2 Years \_\_\_\_\_

Revision Date	Purpose	Supporting Documentation	Editor
04/01/18	Initial Creation	None	Evaluation Committee