

# CARITAS Advocate Evaluation Form

(for advocate use)

The purpose of this form is to help identify strengths and weaknesses of a community advocate (new or tenured) and produce specific action-items to help develop those areas that need to be developed and capitalize on those areas where the community advocate is strong. The ultimate goal is to assist a community advocate into becoming confident and his/her very best at advocating.

## Assessment Skills

Needs Improvement				Excellent	
1	2	3	4	5	

*Determine this based on your debriefing sessions and conversations i.e. after each client visit, notable incident, meeting family members, etc.:*

- What does the community advocate think is going on with the client?
- What are the community advocate's observations of the family?
- What observations have they made about any needs or issues they might need addressed?
- What have they perceived about the client's attitude and understanding of the situation and the expectations of them?
- What have they observed during interactions with the client?

## Note Taking Skills

Needs Improvement				Excellent	
1	2	3	4	5	

*Determine this based on your observation of the content and organization of their notes.*

- What did they feel was important to document after a session the client?
- Did they recap the information they documented either with the interviewee or you to ensure accuracy?
- Is their documentation kept in chronological order and easily accessible when needed?

## Initiative

Needs Improvement				Excellent	
1	2	3	4	5	

*Determine this based on your observation of their ability to use their judgment and do things without needing to be told what to do.*

- Do they take an active role in determining action items?
- Do they initiate contacts and relay information to you without being asked?
- Do they actively seek guidance when needed from you when they have questions or concerns?

### **Relationships with Other Professionals**

Needs Improvement			Excellent	
1	2	3	4	5

*Determine this based on your observations of their interactions with the case parties.*

- Do they maintain professionalism at all times?
- Are they able to establish a rapport and a positive working relationship with other professionals who may be involved with the client?
- Are they able to objectively state any concerns and develop a win/win solution?

### **Relationship with Case manager**

Needs Improvement			Excellent	
1	2	3	4	5

*Determine their ability to establish a positive working relationship with you by direct observation and experience.*

- Are they able to maintain a professional relationship with you?
- If they have any concerns about supervision, are they able to speak openly and productively with you in order to have a positive outcome?
- Do they maintain regular contact with you and follow up with all action items and necessary tasks?

### **Objectivity**

Needs Improvement			Excellent	
1	2	3	4	5

*Determine advocate's ability to make objective assessments and decisions.*

- Are they able to make judgments based on observable actions and be uninfluenced by emotions or personal prejudices?
- Are they able to maintain professionalism in all settings?

## Relationship and Rapport with Clients

Needs Improvement				Excellent
1	2	3	4	5

*Determine their ability to establish a relationship and rapport with their client by direct observation of their visits, the report of the client and the report of others who may observe them with the client.*

- Are they able to communicate with the client?
- Are they able to make the client feel comfortable and enjoy their visit?
- Do they have good boundaries with their client (share appropriate information and have appropriate physical boundaries)?
- Are they able to establish an ongoing dialogue with the clients so they feel comfortable sharing their thoughts and feelings with them?