

CARITAS Advocate Evaluation Form

(A Guide for the Case Manager)

Community Advocates are our front lines and our customers, and we take a large amount of responsibility for their successes and failures. This is no different than any other employer/employee relationship in any other industry. An employer takes responsibility for an employee's development and his/her subsequent successes and failures. A coach takes responsibility for a player's development, successes and failures. The purpose of this form is to help identify strengths and weaknesses of a community advocate (new or tenured) and produce specific action-items for the case manager to follow 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 coach 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?

If the score is less than 4:

1. Write down specific things you would like to see them observe or perceive more or specific things you think they may be "missing" during their observations and why they may be missing them.
2. Write out specific action steps you will take as their manager and coach to help them develop those skills:
 - Ask them more often what their observations are.
 - Ask them "did you notice..."
 - Tell them specific things to pay special attention to prior to their next opportunity to use their assessment skills.

Include specific feedback and Action-items

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?

If they score less than a 4:

1. Write down specific things you would like to see them document or specific things you think they may be "missing" during their time with the client and why they may be missing them.
2. Write out specific action steps you will take as their manager and coach to help them develop those skills:
 - Ask them more often what their observations were about and what was important to document.
 - Ask them "did you notice..."
 - Tell them specific things to pay special attention to prior to their next opportunity to use their note-taking skills.
 - Show them examples of thorough documentation.
 - After interviews, review information gathered and determine what is relevant to document.

Include specific feedback and Action-items

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?

If they score less than a 4:

1. Write down specific things you would like to see them include or specific things you think they may be "missing" in their case activity and why they may be missing them.
2. Write out specific action steps you will take as their manager and coach to help them develop these skills:
 - After important conversations with the client, ask them for their assessment and what they think needs to happen next.
 - Maintain ongoing communication and review expectations about the flow of information between you and them.
 - Ask them what they need from you in order to be successful and follow through.

Include specific feedback and Action-items

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?

If they score less than a 4:

1. Determine what obstacles are in the way of establishing a professional and successful relationship with any professional and develop an action plan to accomplish this.
2. Write out specific action steps you will take as their manager and coach to help them develop those skills:
 - Determine how to best keep the outside professionals informed with relevant information.
 - Are the professionals fully informed about the Caritas Community Advocate role?
 - The community advocate should establish themselves as being a credible source of information and as having the ability to work effectively with the client.
 - Always be respectful.

Include specific feedback and Action-items

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?

If they score less than a 4:

1. Write down specific things you would like to see them do in order to establish necessary communication with you in order to successfully advocate for their client.
2. Write out specific action steps you will take as their manager and coach to help them develop these skills:
 - Let the community advocate know to expect that you will consistently follow up with them and answer all phone calls and e-mails in a timely manner.
 - Be clear with your expectations about how and when you need to hear from them.
 - Establish rapport.

- Praise their efforts and help them learn!
- Provide timely and appropriate coaching in order to help them improve their effectiveness.
- Make the advocate feel that they are a valued team member of Caritas of Austin.

Include specific feedback and Action-items

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?

If they score less than a 4:

1. Write down specific things you would like to see them observe or perceive more or specific things you think they may be "missing" during their observations and why they may be missing them.
2. Write out specific action steps you will take as their manager and coach to help them develop these skills:
 - Ask them more often what their observations were so you will be aware of any concerns regarding their objectivity.
 - Establish open dialogue and let the community advocate know that you want to hear any concerns or feelings they may have so you can come to mutual objective decisions.
 - Read their volunteer file in order to gain any necessary information gathered during their interview in order to determine if they may have problems being objective.

Include specific feedback and Action-items

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?

If they score less than a 4:

1. Determine the comfort level of the community advocate with the client.
2. Write out specific action steps you will take as their manager and coach to help them develop those skills:
 - Model appropriate interaction with the client in front of the community advocate.
 - Suggest activities that the advocate can do with the client during visits.
 - Give them guidelines regarding what information is appropriate to share with a client.

Include specific feedback and Action-items