Using Person Centered Thinking to Affect Organizational Change

Assumptions
- ◊ Employees are inherently good
- ◊ Employees are trustworthy
- ◊ Employees have been trained in Person Centered Thinking

Skills Journey to Becoming a Person Centered Organization
- ◊ This is a story of our journey, we do not have all the answers
- ◊ We are continually evolving and learning how to better support people

What Person Centered Approaches Means at Skills and Why it Matters
- ◊ Skills defines Person Centered Approaches as:
  - – treating all people equally;
  - – respecting the unique attributes of people;
  - – celebrating failures to support learning;
  - – people are the primary decision makers over their lives and work; and
  - – being a resource to support and maintain the balance of important to and important for.
- ◊ 'Person Centered' is not meant to be wielded like a sword

Brief Introduction to Person Centered Thinking
- ◊ The Learning Community for Person Centered Practices
- ◊ Values
  - – Learning cycle
  - – Support rather than fix
  - – Work for humans
  - – Works at every level in the organization
  - – Build the culture of learning, partnership, and accountability
  - – Affirm our belief that everyone can learn

Categories of the Skills
- ◊ Important To and Important For
- ◊ Learning Skills
  - – What's Working and What's Not Working
- ◊ Discovery/Listening Skills
- ◊ Management Skills
  - – Donut
  - – Matching
- ◊ Why people change?
- ◊ Levels of Change
  - – Level 1 – No permission required
  - – Level 2 – Organizational permission required
  - – Level 3 – Governmental permission required
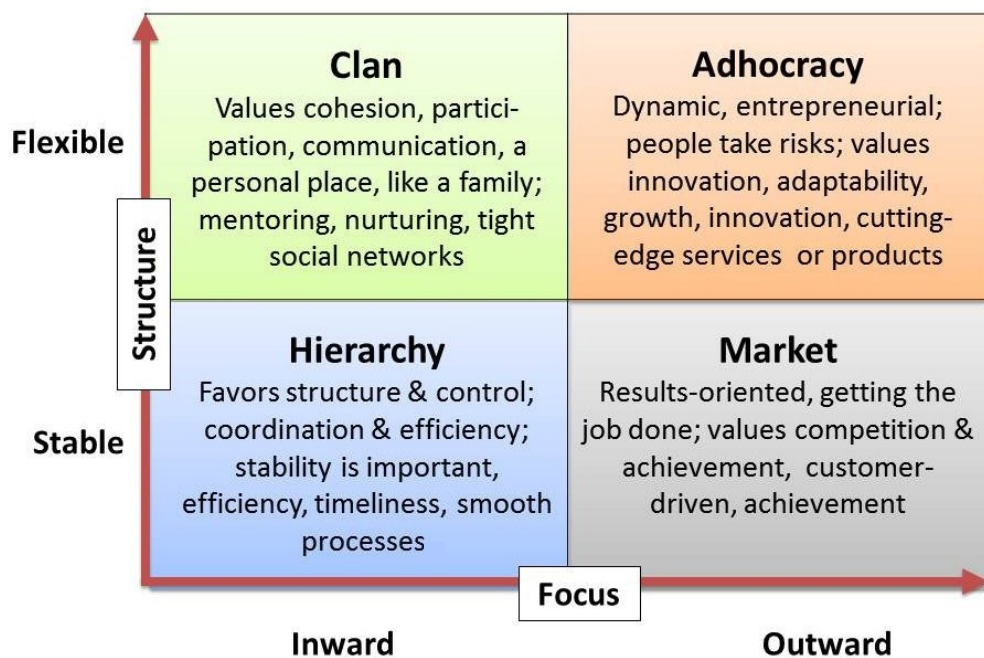
Notes:

	Notes:

Evaluate the Current Culture and Values of Your Organization

◊ Culture and Values
  – How do we define culture and why does it matter?
  – "The Way Things Are" – comprised of norms, values, practices, beliefs, and artifacts
  – Does culture drive or impact performance?
  – Impact on mergers/acquisitions—the Sad Saturn Story
◊ What companies have great cultures? Who are they and what do they look like? ex. Google, Zappos, Southwest Airlines

Aspirational Versus Practiced Values – Minding the Gap

◊ Language—how do we discuss employees and the people who receive services?
◊ Assessing the actual values of your organization
◊ What behaviors are rewarded? Punished?
◊ Where and how are people actually spending their resources?
◊ What rules and expectations are followed, enforced, and ignored?
◊ What stories are legends and what values do they convey?
◊ Look at who is rewarded, promoted and let go or leaves
◊ What is hanging on the walls?
◊ What is communicated in board report and employee newsletters
◊ Performance evaluations
◊ Rituals

Organizational Culture Based Upon Competing Values Framework

Flexible

Clan
Values cohesion, partici-pation, communication, a personal place, like a family; mentoring, nurturing, tight social networks

Adhocracy
Dynamic, entrepreneurial; people take risks; values innovation, adaptability, growth, innovation, cutting-edge services or products

Structure

Hierarchy
Favors structure & control; coordination & efficiency; stability is important, efficiency, timeliness, smooth processes

Market
Results-oriented, getting the job done; values competition & achievement, customer-driven, achievement

Stable

Focus

Inward   **Outward**

Organizational Culture Assessment Instrument

Each of these items contain four descriptions of organizations. Please distribute 100 points among the four descriptions depending on how similar the description is to your organization. None of the descriptions are any better than the others; they are just different. For each question, please use all 100 points. Adapted from Zammuto and Krakower (1991).

*For example: In question 1, if organization **A** seems very similar to mine, **B** seems somewhat similar, and **C** and **D** do not seem similar at all, I might give 70 points to organization **A** and the remaining points to organization **B**.*

1. Dominant Characteristics	Now	Preferred
A. The organization is a very personal place. It is like an extended family. People seem to share a lot of themselves.		
B. The organization is a dynamic and entrepreneurial place. People are willing to stick their necks out and take risks.		
C. The organization is very results oriented. A major concern is with getting the job done. People are very competitive and achievement oriented.		
D. The organization is a very controlled and structured place. Formal procedures generally govern what people do.		
Total	100	100

2. Organizational Leadership	Now	Preferred
A. The leadership in the organization is generally considered to exemplify mentoring, facilitating, or nurturing.		
B. The leadership in the organization is generally considered to exemplify entrepreneurship, innovation, or risk taking.		
C. The leadership in the organization is generally considered to exemplify a no-nonsense, aggressive, results-oriented focus.		
D. The leadership in the organization is generally considered to exemplify coordinating, organizing, or smooth-running efficiency.		
Total	100	100

3. Management of Employees	Now	Preferred
A. The management style in the organization is characterized by teamwork, consensus, and participation.		
B. The management style in the organization is characterized by individual risk taking, innovation, freedom, and uniqueness.		
C. The management style in the organization is characterized by hard-driving competitiveness, high demands, and achievement.		
D. The management style in the organization is characterized by security of employment, conformity, predictability, and stability in relationships.		
Total	100	100

4. Organization Glue	Now	Preferred
A. The glue that holds the organization together is loyalty and mutual trust. Commitment to this organization runs high.		
B. The glue that holds the organization together is commitment to innovation and development. There is an emphasis on being on the cutting edge.		
C. The glue that holds the organization together is the emphasis on achievement and goal accomplishment.		
D. The glue that holds the organization together is formal rules and policies. Maintaining a smoothly running organization is important.		
Total	100	100

5. Organization Rewards	Now	Preferred
A. Distributes its rewards fairly and equally among it members. It is important that everyone from the top to bottom be treated as equally as possible.		
B. Distributes its rewards based on individual initiative. Those with innovative ideas and actions are the most rewarded.		
C. Distributes rewards based on rank. The higher you are, the more you get.		
D. Distributes rewards based on the achievement of objectives. Individuals who provide leadership and contribute to attaining the organization's goals are rewarded.		
Total	100	100

Scoring: Record the number of points you assigned to each scenario in the spaces below. Then calculate an average for each column.

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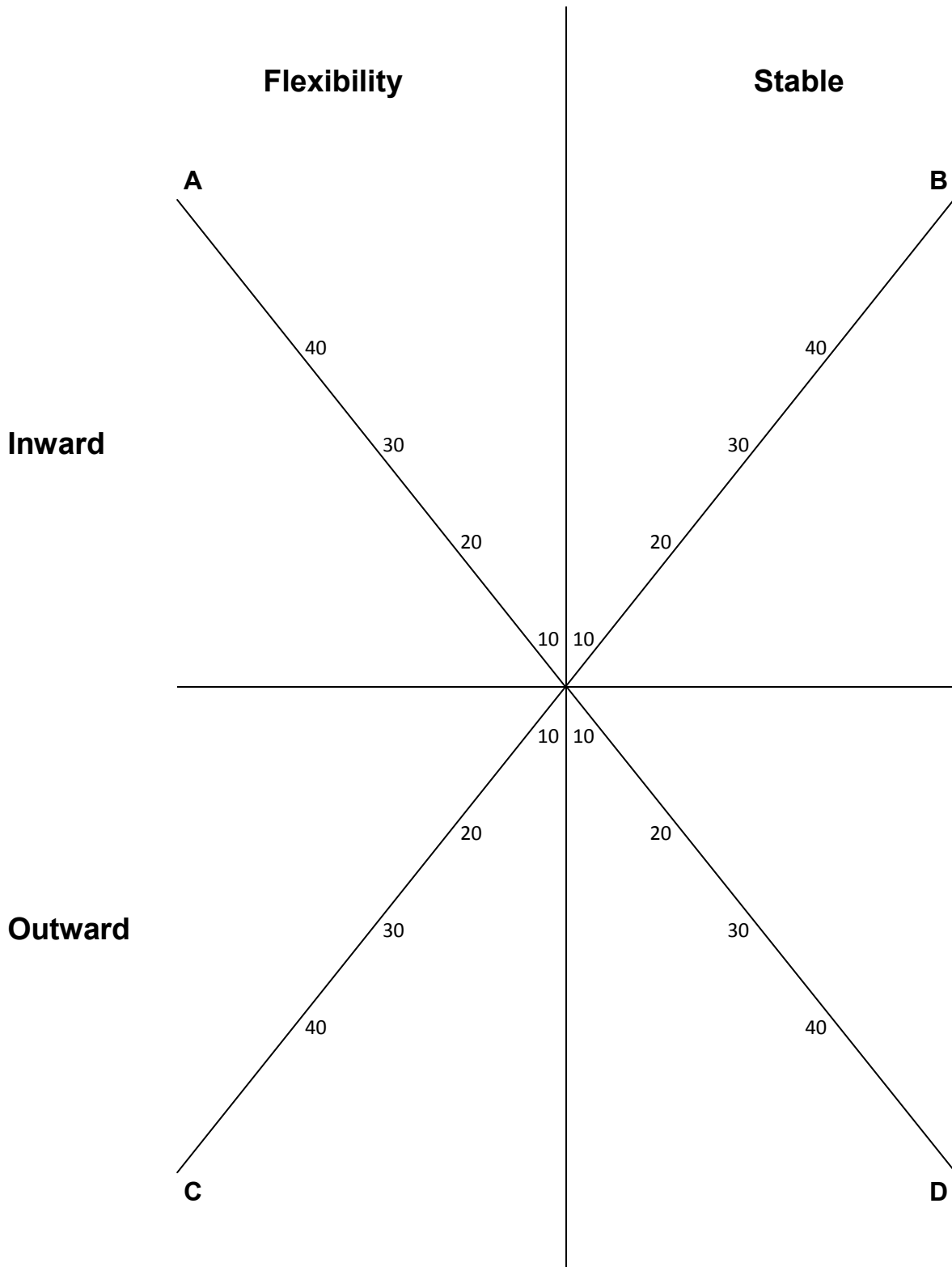<tr><td></td><td>3B</td><td></td><td>3B</td></tr>
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Drawing your cultural profile: Plot the averages on the appropriate diagonal axis. Then connect the dots.

Flexibility   **Stable**

A   B

Inward

40   40

30   30

20   20

10 | 10

10 | 10

20   20

Outward

30   30

40   40

C   D

Implement One Page Profiles for Employees to Enhance Communication, Team Work and Increase Employee Satisfaction

◊ Parts of a One Page Profile
- Picture
- Like and Admire
- Important To
- Supports

SKILLS

Annette Gunyuzlu's One Page Profile

What people like and admire about me…

I am creative, smart and honest.

I stand firmly by my principles.

I'm the idea guy. I have an opinion about everything

I am funny when I want to be.

I never hold a grudge

I am professional when I have to be.

I care very much about the services we provide

What's important to me…

I am a smoker. I like to smoke. I want to smoke. Smoking is great.

My personal privacy is essential.

Color, style and bling.

My grand child Lilli. And family too I guess.

My reputation as fair and honest.

Having a creative outlet—even if I need to make one up—is a good thing.

Coffee. Lots of coffee.

How to support me well at work…

Show me what you mean. I learn faster when I can see it.

Don't try to save me from the evils of cigarettes smoking.

When I start going off on one of my rants (and I will) it's OK to interrupt.

Ask questions if you don't understand what I'm talking about.

Let me know you are hearing me (look at me, nod, smile, grunt or something)

Talk to me when you feel something I have directed is unfair or impossible. I am open to negotiation within reason.

Never– Ever lie to me

I really admire someone who can admit a mistake and learn from it.

If I am not talking– you're probably in trouble

Notes:

	Notes:
Why we use One Page Profiles	

Why we use One Page Profiles

◊ Your team can learn the best ways to support you, so that you can do your best work.

◊ Help to recognize and celebrate each others individuality, contributions and diversity.

◊ Your talents and gifts will be recognized and your supervisor can match you to opportunities to share your talents and skills.

◊ Your personality characteristics can be used to get the best fit with people receiving supports.

◊ The more you know about your team members, the better the team can work together.

◊ Knowing this information can help to have difficult conversations.

One Page Profiles for Employees

◊ Power dynamics between employees and supervisors—confusing assertiveness with aggression.

◊ Power over versus power with.

◊ Trickle-down effect of satisfaction—happy employees increases the happiness of the people receiving supports.

Implementation

◊ Seasoned employees—Refer to pages 9 and 10 for *Team Building Using One Page Profiles* to support seasoned employees in developing their One Page Profiles.

◊ New hire—Refer to pages 11 through 14 for *Developing Your One Page Profile* to support new hires in developing their One Page Profiles.

◊ Seasoned employees vs new hire buy in.

What we have Learned

◊ Confuse assertiveness with aggression.

◊ Confuse feedback with criticism.

◊ People crave open communication to resolve conflicts.

◊ People want to feel appreciated.

◊ Created a space to have difficult conversations.

◊ People are willing to be vulnerable.

What we Still have to Figure Out

◊ How to effectively share and utilize the profiles, so that the effort was not an empty ritual?

◊ How to incorporate the profiles into business practices, i.e. evaluations and positive corrective action?

Team Building Using One Page Profiles

Purpose

We believe that all people should be supported in a manner that works for each person. We are all unique. However, we all have things that are important to us, gifts and talents, and ways that we would prefer to be supported. We all need support in our lives. One Page Profiles will help you to share this information with others so that we can get to know each other better and support each other well.

Objectives

- ◊ Every employee to develop a One Page Profile.
- ◊ Everyone who interacts with a certain employee to have access to their One Page Profile.

Materials

- ◊ Brown paper bags—1 per person
- ◊ Color paper—3 colors, cut into pieces approximately the size of business cards
- ◊ Color 1—labeled 'Like and Admire'
- ◊ Color 2—labeled 'Important To'
- ◊ Color 3—labeled 'Best Support'
- ◊ Assortment of markers and pens
- ◊ Developing Your One Page Profile
- ◊ One Page Profile for each person in the programs chain of command
- ◊ _____'s Draft One Page Profile

Procedure

1. Greet participants. Give location of rest rooms, smoke areas, etc. Discuss any working agreements that you would like to establish.
2. Introduce the team building exercise and give an overview by explaining that:
   - ◊ Conventional team building exercises are often a Band-Aid and rarely address the issues underlying the team's dysfunction.
   - ◊ The most successful team building exercises address cultural changes.
   - ◊ One Page Profiles are a tool that supports cultural change and allows colleagues to get to better know and understand each other.
3. Show the One Page Profiles for each person in the chain of command as examples of completed profiles and to demonstrate our commitment to using One Page Profiles.
4. Explain the Developing Your One Page Profile packet to participants by letting them know that the questions are meant to get them thinking about what is 'Important To' and how to 'Best Support' them. Remind them that the more honest they are while completing the packet, the better One Page Profile they will have and in turn will receive better supports from their supervisor and colleagues.
5. Explain that participants are to complete the Developing Your One Page Profile after the meeting when the demands of the program allow.
6. Give each supporter a brown paper bag and some markers. Ask them to write their names on their bag and to decorate them however they would like.
7. Explain the 'Guess, Ask, Write' process used in person centered planning. We make respectful guesses about what is 'Important to' and how we believe we should 'Best Support' each other. This process of developing One Page Profiles addresses the 'Guess' and 'Ask' phases of planning.

(Procedure continued)

8. Explain to participants that when writing what they 'Like and Admire' about their colleagues, under NO circumstances should they write anything that could be perceived as a negative or considered sexual harassment! What participants 'Like and Admire' about each other should be written on pieces of color 1 paper and deposited into the person's bag.

9. Explain to the supporter that respectful guesses about what is 'Important To' their colleagues should be written on pieces of color 2 paper and deposited into the person's bag.

10. Explain to the supporter that respectful guesses about how to 'Best Support' their colleagues should be written on pieces of color 3 paper and deposited into the person's bag.

11. Ask participants if there are any questions regarding the exercise. Address any questions.

12. Allow participants enough time to go around to write and deposit the papers into each others bags or have the materials available so that people can work at their leisure. Be sure to set deadline.

13. Explain to participants that by using the information from the Developing Your One Page Profile packet and the information gathered by their colleagues, they can now complete a draft of their One Page Profile.

14. Give participants a deadline by when you would like to receive their finished One Page Profiles.

15. Post all completed One Page Profiles somewhere that is accessible to all participants and send a copy of each One Page Profile to your supervisor to maintain a copy.

SKILLS

What people like and admire about me…

What's important to me…

How to support me well at work…

What people like and admire about me…

What’s important to me…

How to support me well at work…

Developing Your One Page Profile

What Others Like and Admire About Me…

Reputations can often precede us and this section gives a glimpse at the bigger picture of who you are. This section is a positive 'proud' list of qualities, strengths, talents and characteristics; it reflects what others value and appreciate about you. Make it clear and avoid using words such as 'usually' or 'sometimes.' Be positive.

What do you like and admire about yourself?

What do others value about you?

What are the positive contributions that you make?

What are your gifts and talents?

What do others see in you and what do you want others to look for?

What is Important to Me…

This section is a summary of what really matters to you... not a list of likes and dislikes. This section needs to have enough detail that someone who does not know you could understand what matters to you.

What is really important to you?

What hobbies do you enjoy?

Do you have possessions that are important to you?

Who is important to you?

Why did you choose this job?

What motivates you to do things you do?

What do you hope to accomplish?

Are there things you want to avoid, cannot tolerate, or would choose not to do?

What is your rhythm or pace of life?

Do you have any important rituals?

How to Best Support Me…

This section is what others need to know to ensure you are receiving the best supports possible, understand your needs, boundaries and where help is needed/desired or where others cannot be helpful. It is also what others can do to make your time more positive and productive and specific areas you want to identify for support.

Have you ever had a boss that you did not clique with? What did this person do or not do?

What supports are helpful to you?

What supports are not helpful to you?

What are things others have done, or do, that annoys you?

What do others need to know to make time at work fun and productive?

Are there 'buttons' that get pushed that could be avoided or handled differently?

Are there areas where you need specific supports or help but have not asked for in the past?

Are there areas where you would like to grow and what supports would help you?

How do you like to be recognized?

How do you like others to show you their appreciation?

How do you like to receive feedback?

Tips for Developing a One Page Profile

Be sure to give enough detail that people will not have to guess at what you are trying to say.

Instead of saying…	Say this...
Having fun	I enjoy harmless practical jokes and time to sit and relax with people over lunch or coffee.
Being organized	Having a "to-do" list for each day. Checking things off as they are completed brings me great joy!
Having control at lunch	Being able to take as long as I want to eat and choosing when I am done.
Stay positive	It helps me when people look for solutions and not problems. I find it very draining if I am the only optimist.
If you see I'm feeling...	Make sure people reading your One Page Profile would be able to identify how you are feeling by describing what they would observe when you are feeling this certain way...

How to Hire Using One Page Profiles and the Matching Skill

◊ Hiring practices—can you see the forest through the trees?

◊ There are 3 powerful reasons why every effort should be made to determine what a good match looks like and why every effort should be made to act on the information. The quality of the match is –

- One of the most powerful determinants of quality of life for people who are dependent on others for support;
- The single greatest determinant of turnover among those paid to provide services;
- Related to the frequency with which issues of abuse and neglect occur – the better the match the fewer issues of abuse and neglect.

◊ Matching Skill

- Personality Characteristics
- Shared Interested (Nice to Have)—labeled as 'Nice to Have' but are essential
- Supports
- Required Skills to provide the Supports required

◊ Using individual One Page Profiles/Matching Form to create a program Matching Form

- Top 3 personality characteristics
- Top 3 shared interests
- Any relevant supports

◊ Refer to page 18 for examples of matching profiles

Notes:

Sample Matching Forms

Supports Needed	Skills Required

Matching for _____   Pcd pg 7

PERSONALITY CHARACTERISTICS

NICE TO HAVE (SHARED INTERESTS)

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SKILLS

Matching for _____

Personality Characteristics

Shared Interests

Supports Needed	Skills Required

Matching Profiles for People Living at 742 Evergreen Terrace

SKILLS
Matching for Fred Flintstone

Personality Characteristics

- Soft spoken
- Comfortable with self image
- Respects person space
- Detailed orientated
- Gentle and calm

Shared Interests

- Coin collecting
- Record players—music—oldies
- Food Network
- Star Trek

Supports Needed	Skills Required
Sensory support	• Limit physical contact • Complete Autism training • Will not over stimulate
Communication	• Limit talking • Get straight to the point

SKILLS
Matching for Jane Jetson

Personality Characteristics

- Fun—not afraid to be silly and dance around
- Soft spoken
- Gentle
- Can read body language
- Comfortable with self image

Shared Interests

- Barney and The Wiggles
- VHS tapes
- Seeing self
- Dolls
- Animals

Supports Needed	Skills Required
Communication	• Lean basic sign language

Job Posting for 742 Evergreen Terrace

Skills

Job Posting Announcement

Posting Date: 08/21/2015
Application Deadline / Posting Removal Date: 12/31/2015
Position Posting Number: EBG8212015

Position: Direct Support Professional - Residential Services
Pay Level: 7
Status: Active
Employment Classification: Full Time
Hours per Pay Period: 40
Location: 742 Evergreen Terrace, Springfield
Work Schedule: Schedule will vary.

Position Reports To: Melvin Peebles

Job Posting Information:
General Requirements: Valid PA Driver's License. Ability to relate to and work with people. Ability to learn and apply concepts of Person Centered Thinking and applicable regulations. Completion of First Aid and CPR Certification within six months of employment. Completion of medication training prior to administering medication. Completion of annual medication training refresher course. Ability to become computer literate and learn and use applicable computer literature. Cooking/Cleaning. Other applicable requirements in accordance with human service regulations. High School Diploma or GED equivalent. Provides day-to-day variety of everyday living services and care for individuals with disabilities using person centered thinking with respect for individuals' rights.

742 Evergreen Terrace, Springfield Specific Requirements: Learn basic sign language.

A person who would work well here would have the following personality characteristics:
- Soft spoken
- Comfortable with self image
- Detail orientated

A person who would work well here would have the following interests:
- Old music and record players
- Children's cartoons
- Star Trek

	Notes:
Adapt the Person Centered Thinking Skill, the Donut, to Write Policies, Procedures and Processes that Reinforce an Organizational Culture of Accountability and Learning.	

Adapt the Person Centered Thinking Skill, the Donut, to Write Policies, Procedures and Processes that Reinforce an Organizational Culture of Accountability and Learning.

◊ Current policy writing principles
  – Minimize risk
  – Define process and protocols
  – Written for 20% but affect all

Simplify Policy Writing by Believing that Your Employees are Inherently Good and Trustworthy

◊ Below is Skills' Dress Code Policy
◊ Problems with the policy are bolded, italicized and underlined.

POLICY

All Skills of Central PA, Inc. (Skills) employees are expected to wear clothing that is appropriate for their job and work site. As a representative of Skills, it is essential that each employee project a professional and positive image of our organization. Appropriate attire, appearance, grooming and personal hygiene standards must be followed to project a proper image to the people we support, their families, agencies, vendors, visitors, guests and coworkers.

PROCEDURE

1. Good grooming and personal hygiene practices are required by all employees. All employees must maintain a clean and odor-free appearance.
2. Hair, beards and mustaches must be neatly trimmed. For staff who are preparing meals, long hair must be pulled back or a hair net must be worn. Hand washing is required by all employees following the use of restroom facilities.
3. Fingernails, including artificial fingernails and nail extenders, must be well manicured and trimmed to a conservative length.
4. Attire must be proper and appropriate for the workplace as determined by the Vice President or Director. The wearing of certain apparel is prohibited since it may detract from our professional image or pose a safety risk. Examples of unacceptable attire are: Clothing with stains, holes, tears or frayed edges; clothing that is too tight or too revealing; muscle shirts, halters, spaghetti-straps, open-weave, tube, midriff and tank tops, scrubs; ***open-toed shoes or sandals for direct support, housekeeping or dietary staff; and "flip-flops" for all staff.***
5. ***Slip-resistant footwear (i.e., sneakers) must be worn on the job by direct support staff to minimize the possibilities of slip and fall accidents/injuries.***
6. Clothing with objectionable, offensive or obscene pictures, slogans, or expressions is not permitted.
7. Do not wear expensive and/or dangling jewelry that can be pulled by people we support or that can potentially become caught in equipment or machinery.
8. Skirts, skorts, culottes and capris may be worn. Length is to be no shorter than at or slightly above the knee.

9. *Shorts and jeans may be worn by direct support staff only.* The length of shorts is to be no shorter than at or slightly above the knee.

10. *Corporate Office and Regional Office staff may wear jeans and sneakers on Fridays or when working on a project that demands casual clothing (e.g., file purges, heavy cleaning). Corporate Office and Regional Office staff may also wear jeans and sneakers the day before a holiday.*

11. *Management staff may wear jeans while performing direct support, employment services, adult training or vocational training duties.*

12. *Jeans and sneakers are not permitted to be worn by Corporate Office and Regional Office staff when they are meeting with visitors or representing Skills at an internal or external function. Corporate Office and Regional Office staff are not permitted to wear shorts, sweatpants/sweat suits or jogging suits of any type.*

13. Employees representing our organization in public settings, such as meetings, seminars or schools, are expected to dress in business attire (i.e., no jeans, shorts or casual clothing).

14. Employees inappropriately dressed for work in violation of this policy will be counseled and sent home by management staff to change into proper attire. The employee will be required to use personal or vacation time or time off without pay for the period they are absent from work.

15. Skills reserves the right to determine the acceptable standards of personal appearance. Violations of this policy will be cause for disciplinary action, up to and including termination of employment.

Notes:

Punitive versus learning policies

◊ Do your policy writing principles align with your organizational culture and values?

◊ Learning policies, procedures and processes support talented people to get more done and to innovate

◊ Punitive policies, procedures and processes wastes time and energy trying to punish mistakes that can be recovered and learned from (does not negatively affect a person's health, safety and happiness)

◊ Perceived or actual need of supervisors' approval

	Learning	**Punitive**
Outcome	Earning trust and agreement to change	Compliance
Focus	On problem	On employee
Responsibility	Employee	Supervisor
Time	Future—moving forward	Past
Communication	Two-way	One-way
Environment	Collaborative	Authoritarian
Effects	Engagement	Avoidance

Review of the PCT Donut and Charles Handy's Doughnut

◊ Core responsibilities – Contains all the things which must be done in that job or role if you are to succeed.

◊ Judgement and creativity – Opportunities to make a difference, to go beyond the bounds of duty, to live up to your full potential.

◊ Not your responsibility – Added by Michael Smull to identify areas that are not the responsibilities of staff.

Examples of Policies, Procedures and Process That Use the Donut

◊ Skills' draft of a Positive Corrective Action and Progressive Discipline Policy

Notes:

POLICY STATEMENT

It is the policy of Skills to take a fair, consistent and proactive approach to corrective action and progressive discipline to employees, up to and including termination. Whenever possible, preventative actions will be taken with the intention of correcting deficiencies in the areas of attendance, performance, behavior or conduct with employees and to identify and provide the supports needed for the employee to be successful.

PROCEDURE

CORE RESPONSIBILITIES	JUDGEMENT AND CREATIVITY
Preventative actions are required when absenteeism, potential performance, behavior or conduct concerns become apparent. Supervisors must initiate positive corrective action with an employee to correct or improve employment related problems or behaviors and to identify, discuss, recommend and implement appropriate supports and correction action. Counseling with employees will be documented on a *Summary of Counseling/Coaching* form. Coaching is documented on a *Summary of Counseling/Coaching* form and an *Employee Action Plan*.	Determine which preventative action is the most appropriate and will provide the employee with the best support possible by discussing the issue with the employee to see where they are struggling: Counseling – help the employee understand organizational policies, procedures, or standards, and to realize how their actions affect the organization and the people supported. Coaching – share professional development and positive feedback with the employee. Offer guidance and resources based on the employee's needs and update their one page profile, as needed. Follow up with the employee regularly to discuss progress and to offer additional guidance if necessary.

Excerpt from Skills' Current Corrective Action/Progressive Discipline Policy

Notes:

POLICY

It is the policy of Skills of Central PA, Inc. (Skills) to administer a fair and consistent process of corrective action and progressive discipline for any employee who violates organizational procedures or who fails to meet expected standards of job performance or behavior. Employees must comply with all applicable local, state and federal regulations, including, but not limited to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all other employment-related legislation. The primary intent of this policy is to focus on resolving problems via counseling and corrective action and to emphasize that any corrective action taken is not intended as a form of punishment. All staff are employees at-will. Therefore, both the employer and employee retain the right to terminate the employment relationship at any time and for any reason.

PROCEDURE

1. Progressive discipline will be initiated with an employee when it is necessary to address employment related problems and to discuss, recommend and implement appropriate corrective action.
2. When a supervisor observes or becomes aware of work-related behavior that is unacceptable in the area of performance, conduct, attitude, safety, honesty, following proper procedures, attendance, excessive absenteeism, improper or excessive call-offs, missed time clock-ins and/or clock-outs, or any other employment issue, corrective action will be taken.

Lisa's Story

Lisa has worked for Skills for 21 years and is described by her co-workers and supervisors as being a dedicated hard-worker who is always willing to help others and takes great pride in her work. Lately, people have been noticing a change in Lisa's behavior and performance. She has been missing clock-ins and clock-outs, missing deadlines and never seems fully present when participating in meetings and trainings.

Based on the two versions of Skills Corrective Action Policy, what should you do as a supervisor? Does it matter why?

The rest of the story… Lisa is the primary caregiver for her parents who have been having escalating medical problems over the last few months.

Design an Employee Evaluation Using the Person Centered Thinking Skill What's Working and What's Not Working, to Improve Employee Development and Reinforce Your Values as an Organization.

◊ What's Working and What's Not Working
- This is an analytic tool that supports you in looking at a snapshot in time from multiple perspectives. It is a way to analyze a situation so that you capture what is working or making sense within that situation as well as what is not working.

◊ Use your organizations values to simplify your employee evaluation process

◊ Complete a 360 degree evaluation

◊ Create outcomes for employees to grow
- To enhance area where the employee already has strengths and passion
- To improve on areas where the employee is struggling

◊ Opportunity to update One Page Profiles

Notes:

SKILLS OF CENTRAL PA, INC.
Performance Evaluation

Employee Name _____ **Region** _____ **Date of Hire** _____

Position Title _____ **Evaluation Completion Date** _____

PURPOSE

Skills of Central PA, Inc. believes that its success is ultimately based on its employees and their ability to maximize their potential. Therefore, it is Skills' policy that all employees have the opportunity to have their work performance formally reviewed. The purpose of a formal employee evaluation is for the employee and supervisor to collaboratively evaluate the employee's job performance.

Central to the evaluation process for all personnel is the employee action planning process where the employee and the supervisor select the areas in which the employee's job performance can be enhanced and then collaboratively develop an Employee Action Plan.

In addition to the formal annual review process, the supervisor should participate in informal reviews throughout the year in order to provide recognition as well as feedback on areas that can be improved upon. This is critical so that the results of the formal process can be best utilized by the employee and so that "surprise" is not a part of the review process. The formal evaluation process should focus on the employee's performance during the prior twelve months as it relates to:

- their main job duties and responsibilities;
- action steps agreed upon in the Employee Action Plan for the previous year; and
- contributions the employee has made to the overall organization.

INSTRUCTIONS/TIMELINE

Three weeks prior to the evaluation due date, the Performance Evaluation forms will be distributed to the employee in order to allow time for both the employee and supervisor to prepare for the evaluation meeting. At the time of scheduling, the employee should ask any questions he/she may have about how to complete the Self-Evaluation. The Performance Evaluation meeting will be scheduled one week prior to the actual evaluation due date. The employee and supervisor should be prepared for the evaluation meeting by bringing the completed Self-Evaluation and a draft of the Performance Evaluation, respectively. The meeting should be reflective of a mutual discussion of the employee's performance over the prior year and a collaboration to complete the Employee Action Plan.

* Employee Signature: _____ Date: _____

Person Completing Evaluation: _____ Date: _____

Additional Signature (One level up): _____ Date: _____

* *Employee's signature indicates that the employee has participated in completion of the Performance Evaluation and agrees with the Employee Action Plan.*

Section 1 — Performance Evaluation Criteria

1. **Person Centered Philosophy and Practice**
   - Recognizes and respects the person's choices
   - Promotes independent decision making by people supported
   - Supports the person to explore meaningful ways to contribute to his/her community
   - Uses "Person First" language
   - Promotes the mission of the person centered organization through daily practice and performance on the job

2. **Job Knowledge**
   - Understands all aspects of the responsibilities for the specific position held
   - Carries out specific duties with proficiency
   - Recognizes the parameters of the position (knowing what to do and what not to do)

3. **Building Relationships**
   - Is a Team Player and works towards the goals of the group
   - Responds positively to requests and follows through
   - Is realistic, tactful and professional in all interactions
   - Presents self in a manner that compliments the Mission Statement and Values of the organization
   - Actions promote improvement/growth for the organization and quality of life of people supported
   - Personal relationship are friendly, helpful and professional
   - Tolerant of others' working styles and accepting of differing opinions
   - Actively/constructively participates in meetings
   - Offers and accepts constructive criticism
   - Accepts all assignments willingly, even those job tasks that may be less desirable
   - Shows dedication to the department and organization
   - This section should also contain any direct compliments/concerns about the employee from people we support, co-workers or outside advocates

4. **Health/Safety/Security**
   - Ensures a safe workplace environment
   - Follows company and department safety rules
   - Attends annual safety trainings
   - Provides a safe, caring environment for the people we support
   - Adheres to confidentiality requirements for release of information regarding staff and people we support

5. **Documentation/Communication**
   - Shares information appropriately
   - Properly documents information
   - Completes required documentation (timesheets, communication logs, forms, etc.) in a timely manner
   - Amount of information provided is appropriate
   - Uses Chain of Command and "need to know" procedures
   - Record-keeping is clear, concise, accurate and legible
   - Verbal communication is appropriate, respectful, relevant and understandable

6. **Planning / Organizational Skills / Adaptability / Flexibility**
   - Able to plan schedule in a way that works for everyone (supervisor, co-workers, people supported)
   - Able to plan ahead but able to adapt to the unexpected
   - Able to readily adapt to organizational changes, changes in people supported, licensing changes, etc.
   - Organized and able to meet deadlines
   - Adapts to team decisions that may differ from own ideas or beliefs

7. **Training Goals/Learning/Growth**
   - Provides training to support individual/staff needs
   - Meets program yearly training requirements
   - Expand job knowledge/cross training of staff
   - Attends training seminars

8. **Cost Awareness**
   - Has some knowledge/understanding of program budget
   - Respects company equipment and property
   - Offers ideas for cost efficiency to Supervisor
   - Uses common sense when purchasing with Skills money i.e., coupons, sales, repair vs. buy new
   - Makes sound decisions in regards to the money belonging to people supported

Section 2 — Performance Evaluation

Person-Centered Philosophy and Practice	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Job Knowledge	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Building Relationships	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Health/Safety/Security	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4..	4.

Section 2 — Performance Evaluation

Documentation/Communication	
What's Working	**What's Not Working/Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Planning/Organizational Skills/Adaptability/Flexibility	
What's Working	**What's Not Working/Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Training Goals/Learning/Growth	
What's Working	**What's Not Working/Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Cost Awareness	
What's Working	**What's Not Working/Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Section 3 — Employee Action Plan

A critical part of every evaluation is the development of the Employee Action Plan (goals) for the employee. Employee Action Plans do not necessarily imply that the employee has a performance issue or need, but can also be a means to assist the employee to further develop a skill to advance his/her career or identify how the employee could be a mentor or role model for other employees.

The Employee Action Plan should be a collaborative effort between the employee and the supervisor. It should encourage career growth that applies to the employee's particular position, sharing a particular skill, or interest in career advancement. Specific action steps should be developed to help the employee reach their goal. The "By Whom" section can be the supervisor (i.e. providing the employee something he/she needs to meet the action step) or the employee (actions the employee needs to take to achieve the action step). "By When" refers to the date by which the action step is to be completed. The number of Action Plan Items should be based on the individual employee but there should be at least one (1) Action Plan Item assigned. There should be no more than three (3) Action Plan Items in the Employee Action Plan. When developing an Employee Action Plan, it is important to consider the following factors:

- **Use a Team Approach** — Take into account the ideas of all who contributed to the evaluation.
- **Be specific** — Goals need to be specific and should include specific tasks or steps needed to move towards completing the goal. Make sure the tasks are broken into manageable parts.
- **Assign timelines** — Place timeframes/deadlines on each individual task and the overall action plan.
- **Schedule Review Time** — Be sure to schedule future times to review progress towards the action plan. Reviews can be completed through face-to-face meetings, phone contacts or emails, depending on the nature of the action plan.

Please use the Progress/Other Comments section (page 6) to track progress on Action Plan(s) and to record additional information about employee performance throughout the year.

ACTION PLAN:

Action Steps	By Whom	By When
1.		
2.		
3.		

ACTION PLAN:

Action Steps	By Whom	By When
1.		
2.		
3.		

ACTION PLAN:

Action Steps	By Whom	By When
1.		
2.		
3.		

Comments:

Section 3 ─ Employee Action Plan

Progress/Other Comments (Please use this section to track progress on Action Plans and to record additional information related to employee performance throughout the year).

Performance Self-Evaluation

Person-Centered Philosophy and Practice	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Job Knowledge	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Building Relationships	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Health/Safety/Security	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Performance Self-Evaluation

Documentation/Communication	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Planning/Organizational Skills/Adaptability/Flexibility	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Training Goals/ Learning/Growth	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Cost Awareness	
What's Working	**What's Not Working / Supports Needed**
1.	1.
2.	2.
3.	3.
4.	4.

Performance Evaluation Tracking (Optional) = This tracking form may be used to track employees you supervise by listing their names and making the months in which Action Steps are due and/or completed.

	Name	Completion of Action Steps											
		Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
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29													
30													
31													
32													

Name: _____

SKILLS
Wendy's One Page Profile

What people like and admire about me…

- My ability to be forthright
- My sense of humor
- My ability to step back from a situation and see the larger context
- My ability to contemplate all options
- My enthusiasm
- My willingness to change and do things differently

What's important to me…

- To work in a team environment where everyone is valued, engaged, and empowered.

- To receive open and honest communication even if it is something I may not want to hear. I value honesty.

- To be challenged with problems and play a part in the solution.

- To have the right tools to complete my job – software, hardware, etc.

- I like diversity of my job – writing, reviewing, team meetings, public speaking, program development.

- To be organized in an electronic format rather than paper.

- To work with individuals who are not defined by typical boundaries (that is not my job) or

How to support me well at work…

- Realize many days feels like a busy ER – a week goes by in a blink of an eye – I need some reasonable expectation of turnaround times.
- I like emails which allow me to quickly respond and to track open items or if it cannot wait call my cell – many times I am out of the office. Don't give me assignments in the hallway etc. – we can talk about an item but then send me a brief email as a follow-up.
- To slow me down when I get ahead of myself.
- To give me open and honest feedback and criticism.
- I rarely close my door but when I do please allow me quiet time and only infringe if absolutely necessary.
- Give me items in finished format – proofed, formatted appropriately, etc.
- Appreciate that I do not sometimes pickup on subtle hints – you may need to be explicit.
- Laugh with me.
- Remind me to share what is in my head.

Contact Information—(814) 238-3245 ext. 324—wpardee@skillsgroup.org

GREAT THINGS ABOUT JOSH

- *Passionate about sharing learning.*
- *Dedicated to work, department, colleagues and the people who receive supports.*
- *Thoughtful.*
- *Always willing to help others and accept new responsibilities.*
- *Respectful of different perspectives.*
- *Observant—notices details.*

- *Direct and honest in a mostly tactful manner.*
- *Makes a fashion statement—good or bad is a matter of perspective. :-)*
- *Can sense and defuse a tense situation.*
- *Dynamic presenter—adapts to meet the needs of an audience.*
- *Creative & eccentric*
- *Can make people laugh*

THINGS IMPORTANT TO ME
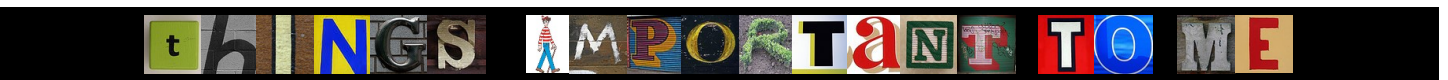
- Having fun at work—I enjoy light hearted humor and harmless practical jokes.
- Celebrating failures—failures are learning opportunities and reinforce a learning culture.
- Language—I model respectful, People First Language but I will never correct the language of others unless asked.
- Having clear responsibilities and deadlines.
- Knowing I have the support of my colleagues and supervisor.
- Ensuring my actions are always aligned with Skills' values, mission and vision.
- Completing quality work of which I am proud and that will make a positive difference in the lives of the people we employ and the people who receive supports.
- Having open lines of communication with my colleagues, team and supervisor and clear communication with senior management.
- Being able to share my learning and being able to learn from others.
- Making people smile and doing small things to help people have good days at work.
- Helping others find the fun!

HOW TO SUPPORT ME
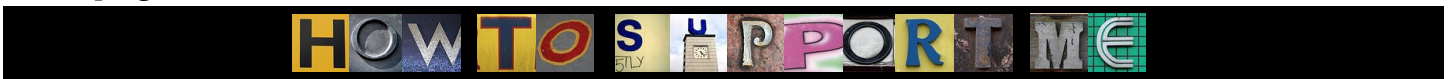
- ◊ I appreciate direct, honest and constructive feedback—it is how I grow as a person and trainer.
- ◊ E-mail is my preferred means of communication—**please give a detailed subject**.
- ◊ I do not generally ask for help. If I ask for help, please provide any support you can as I am struggling to stay above water.
- ◊ I process ideas by playing "Devil's Advocate" and asking questions. I am not arguing with you, I am trying to see a different perspective and help you to do the same.
- ◊ I am easily distracted **aww... shiny**... If you see that I am focused on something please do not interrupt me.
- ◊ Be on time and prepared to start and end meetings and trainings on time.
- ◊ Follow up with me in a timely manner or let me know when you will be able.
- ◊ Make sure I write to-do items down in my little black book.
- ◊ If we have a conversation while I am not at my desk, please follow-up our conversation with an email.
- ◊ If my humor offends you, please let me know, so I can learn the boundaries of our working relationship.
- ◊ I am passionate about sharing my learning with others. If I come across as "lecturing," "preaching" or "standing on a soap-box" please let me know. That is not my intent.
- ◊ I am not fluent in the language of 'politics' or 'diplomacy.' I do not intend to be disrespectful. I am just advocating my belief of what constitutes the best moral and ethical practices.
- ◊ I do not do well when I have to wait. Do not tell me you have news (good or bad) and then tell me I have to wait to hear it.
- ◊ Have a positive attitude and HAVE FUN!

Contact Information—(814) 472-1031 ext. 104—jzernick@skillsgroup.org