

# Our Voice



## Performance Appraisals

CLO often gets asked by member programs for resources and sample policies relating to performance appraisals of staff, boards and volunteers. In this issue of OURVOICE, CLO will share information on this important topic.

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### Performance Appraisals for Staff

In general, the board reviews the Executive Director and the ED reviews all other staff. Appraisals should occur annually and be conducted in a consultative and open manner. The content of performance appraisals varies between organizations, but often contains the following:

- ⇒ A review of the extent to which all performance objectives as stated in the employee's job description or contract were met.
- ⇒ A review of the employee's areas of strength.
- ⇒ A review of the employee's areas for growth.
- ⇒ A review of the employee's professional development needs.
- ⇒ An opportunity for the employee to share any special achievements.
- ⇒ A review of any needs the employee may have to support their work (working conditions and equipment, flexible work arrangements, etc.).
- ⇒ A rating of the employee's performance for that year.

Herb Perry in the Association Consultants Report offers the following advice for board members when evaluating the Executive Director:

- ⇒ Do not involve the entire board. It is too large a group and will include directors whose contact with the Executive Director is limited.
- ⇒ Start by reviewing the organization's mission and goals together with the previous performance review, note particularly any agreed upon targets for the period under review.
- ⇒
- ⇒ Avoid assessing personality traits.



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### DOMTAR'S PAPER CHRISTMAS FOR LITERACY!

For the second year in Ontario, Domtar's *Paper Christmas for Literacy* is donating \$500 worth of paper to various not-for-profit literacy groups. Domtar has several partners in Ontario and Quebec to help with this venture. CLO is one of the partners in this province. CLO members were invited to participate and 71 of our members responded.

For CLO members alone, this means that a total of \$35,500 will be donated to literacy by Domtar. On behalf of our member agencies, CLO would like to express our gratitude to Domtar for this wonderful opportunity. Thank you for supporting literacy!

## Performance Appraisals

⇒ Confirm all decisions in writing.

### Performance Appraisals for Volunteers

Performance appraisals for volunteers are important. They provide the volunteer with acknowledgement and appreciation for their work. If problem areas exist, needed adjustments, supports and / or training can be provided. Overall, volunteers' confidence in their ability to do their job should be increased as a result of the process. Performance appraisals should also provide organizations with important information that they can use to improve their volunteer program.

Volunteers should receive a written evaluation from their supervisor (Program Coordinator, Student-Tutor Coordinator or Executive Director). The volunteer should have the opportunity for self-assessment and open communication about their performance and needs.

As volunteers are an integral part of an organization's human resource team, many similarities to staff appraisals exist. Volunteer appraisals should occur annually and could cover the same areas as a staff performance appraisal (as overviewed on page 1). However, the following questions could also be asked:



- ⇒ To best fulfill your role, do you need any additional information and training?
- ⇒ Are you happy with your current volunteer assignment?
- ⇒ Are there other areas where you would like to volunteer in our agency?
- ⇒ What is the best experience you have had while volunteering with us?
- ⇒ What changes would you like to see in our volunteer program?
- ⇒ How can we further support you as a volunteer?

### Performance Appraisals for Boards

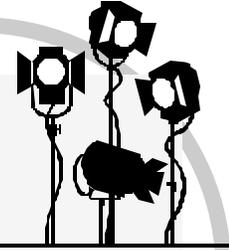
Performance appraisals for boards are usually conducted by self-assessment of individual and group performance and needs. Often, board performance appraisals occur much less often than staff or volunteer appraisals, if at all. However, having the board conduct a self-assessment can be a wonderful tool for increasing board performance AND satisfaction. Boards could consider setting up an annual process where board members individually answer the following questions, then discuss the results in a group format (or just give their individual assessments to the chair if the issues are too difficult to discuss in a group format).

Board members could ask themselves some or all of the following questions:

- ⇒ Are board members committed to the literacy agency, its mission and programs?
- ⇒ Do board members feel respected and valued by their literacy agency?
- ⇒ Do board members understand their roles and responsibilities?
- ⇒ Do board members fulfill their responsibilities and provide proper governance and oversight?
- ⇒ Do board members receive enough training and information?
- ⇒ Are board and committee meetings effective?
- ⇒ Is there good attendance at board and committee meetings?
- ⇒ Does the board function well, and have mutual respect and teamwork?
- ⇒ Is the board representative of the community its serves?
- ⇒ Do board members have all of the needed skill sets?
- ⇒ What is the best thing about being on this board?

## In the Spotlight—Success Community-Based Style “Literary Tuesday in July”

By Lee Torvi



*Literary Tuesdays in July* was so successful last summer that Renfrew County Community Upgrading Program (RCCUP) plans to make it an annual event. This extremely effective fundraiser was the inspiration of an RCCUP board member. She believed that the community would enjoy a series of dessert-and-coffee evenings featuring readings by popular authors. She was right.

*Literary Tuesdays* started by partnering with a local restaurant owner. (His business is usually slow on Tuesday evenings.) He agreed to provide his restaurant, take reservations from people who planned to attend, serve dessert and coffee/tea and give us \$5 of the \$10 that each person paid to attend. We contacted four Ottawa Valley authors, Mary Cook, Elizabeth Hay, Frank Cosentino and Mary Jane Maffini, who all agreed to come to do a reading and promote their books while supporting our literacy program. We promoted the event in our newsletter, in local newspapers and through word of mouth. Each evening, desserts were served at 7:00 p.m. while we gave a welcome and a brief introduction of our literacy program. Then we introduced the guest author who took over from there. Each evening brought a full house and as people left, at about 9:30 p.m., they often asked if we would run this event again. We promised we would.

*Literary Tuesdays* was effective in many ways. It was fairly easy to do. The restaurant gained business. The community gained an enjoyable summer evening activity. The authors promoted their work. RCCUP's fundraising committee raised about \$600. (Next summer we intend to move to a larger restaurant). Best of all, we thoroughly enjoyed ourselves. You might like to try it too in your community.



### Helpful Resources

In recognition of the importance of the hiring and evaluation process for all not-for-profits and of the requests for information received by CLO, as one of this year's "members-only" benefits, CLO will be purchasing and circulating a copy to every organizational and associate member of "*Hiring and Performance Appraisal of the Executive Director: A Self-Guided Workbook*".

A new CLO resource is our fabulous *Professional Development Planning Tool*. If you would like to receive an e-copy of this document, please email CLO. You can also find it in CLO's "*Skills for the Future: A Training Resource for Literacy Practitioners*", on pages 342-357.

While surfing the web, be sure to check out "*Developing Human Resources in the Voluntary Sector*" at [www.hrvc.ca](http://www.hrvc.ca). This site provides a wide variety of human resource information for not-for-profit organizations in Canada. It contains information on hiring, supervising, motivating and evaluating staff. It also has a "*Good HR Practices Tool Kit*" and an "*HR Planning Guide*".



**CLO's 10th Anniversary Conference will be held on October 20-22, 2004 at Fern Resort in Orillia**

**CLO is proud to announce our new Board of Directors**

- Joyce Bigelow (Sharbot Lake)
- Linda Conley (Picton)
- Laurie DesLauriers (Napane)
- Jan Goatcher (Ottawa)
- Heather Hufton (Peel)
- Sheila Marshall (Timmins)
- Margaret Maynard (Beamsville)
- Joan Robinson (Toronto)
- Valerie Sadler (Hamilton)
- Penny Smith-Jensen (Dryden)
- Brendan Tarry (Burlington)
- Denise Tremblay (Iroquois Falls)

**CLO's Staff**

- Joan Beaudry—Administrative Assistant
- Jette Cosburn—Co-Executive Director
- Joanne Kaattari—Co-Executive Director
- Vicki Trottier—Family Literacy

## CLO News!

- ⇒ At CLO's Annual General Meeting on September 26, 2003, a full slate of 12 directors was elected to CLO's board of directors. All regions of Ontario are represented.
- ⇒ We are proud to announce our new executive: Jan Goatcher (Co-Chair); Val Sadler (Co-Chair); Margaret Maynard Treasurer); Joyce Bigelow (Secretary).
- ⇒ CLO wants to sincerely thank our three retiring board members Betty Ffrench, Dan McGibbon and Lee Torvi for their commitment and service to CLO.
- ⇒ CLO's annual conference was held on September 25-26, 2003 at Horseshoe Resort. The theme was "The Use of Technology in Community Literacy Agencies". Participant evaluations were overwhelmingly positive with participants appreciating both the workshops and the opportunity to network and share information.
- ⇒ Watch for a written summary of the conference workshops to arrive in your mailbox in January 2004.
- ⇒ At our AGM, CLO was extremely proud to launch "Skills for the Future: A Training Resource for Literacy Practitioners". This 10-chapter, 411-page resource manual is chock full of resources and information for every literacy practitioner. We are receiving rave reviews about it.
- ⇒ Irene Wilmot from the London Community Schools Association sent us this email: "I wanted to let you know how much I enjoyed reading the "Skills for the Future" manual. It's one of the resources which I will refer to on an ongoing basis. Thank you for taking the time to do this for those of us on the 'front line'. I think the manual sums up things so well and it's logically laid out and very user friendly. "
- ⇒ In 2003-2004, CLO received funding from the National Literacy Secretariat for two new projects: "Online Training in Foundational Family Literacy—Phase Two" and "Raising the Bar and Celebrating Success" (CLO's AGM and Conference 2004).
- ⇒ Since CLO received fewer projects than usual, we were sad to lose the services of our long-time staff member, Lindsay Kennedy. Lindsay is still active in literacy and is continuing her work on updating the Adult Literacy Educator course for Project Read. Thank you, Lindsay!

*CLO gratefully acknowledges its funder: the Ministry of Training, Colleges and Universities.*



*OURVOICE is published three times per year by CLO. Writing and desktop publishing by Joanne Kaattari.*