
Management Evaluation: What does Good Management Look Like?

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Evaluation - Discussion Points

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Definition of Evaluation

(Webster New World Dictionary)

■ Evaluate

1. To find the value or amount of,
2. To judge or determine the worth or quality of:
appraise.

■ Why do evaluations?

1. To motivate a person to continue good behavior
2. To motivate a person to change behavior if the behavior does not get the desired results.

“Feedback is the breakfast of champions”,
by Tom Peters

Successful Relationship Model

- Authority – What power does one have to make decisions to get things done?
- Responsibility – What tasks, jobs does the person have to perform? Has the person agreed to do these tasks?
- Accountability – Who holds the person accountable? How will the person be measured? How and when will the person be evaluated?
- Compensation – What is the total compensation (Money, vacations, “pats on the back” or ...) ?
- For success, all of these must be in alignment. When there is alignment, there is Integrity

INTEGRITY

- Integrity is saying what you are going to do, then doing what you said.
- If you find that you can not do what you said, then you let the person know immediately.
- This is Honoring Your Word
- Another definition is Planning Your Work and Working Your Plan
- Talk the Walk and Walk the Talk

Problem Solving Model

1. Define problem or opportunity
 - a. Current Situation (What's happening now?)
 - b. Desired Situation (What do you want to happen, goal?)
2. Assumptions/facts, what you think or know
3. Alternatives, a minimum of three
4. Analysis of Alternatives
5. Recommendation/Decision
6. Implementation – who, does what, when!
7. Evaluation of person and/or project

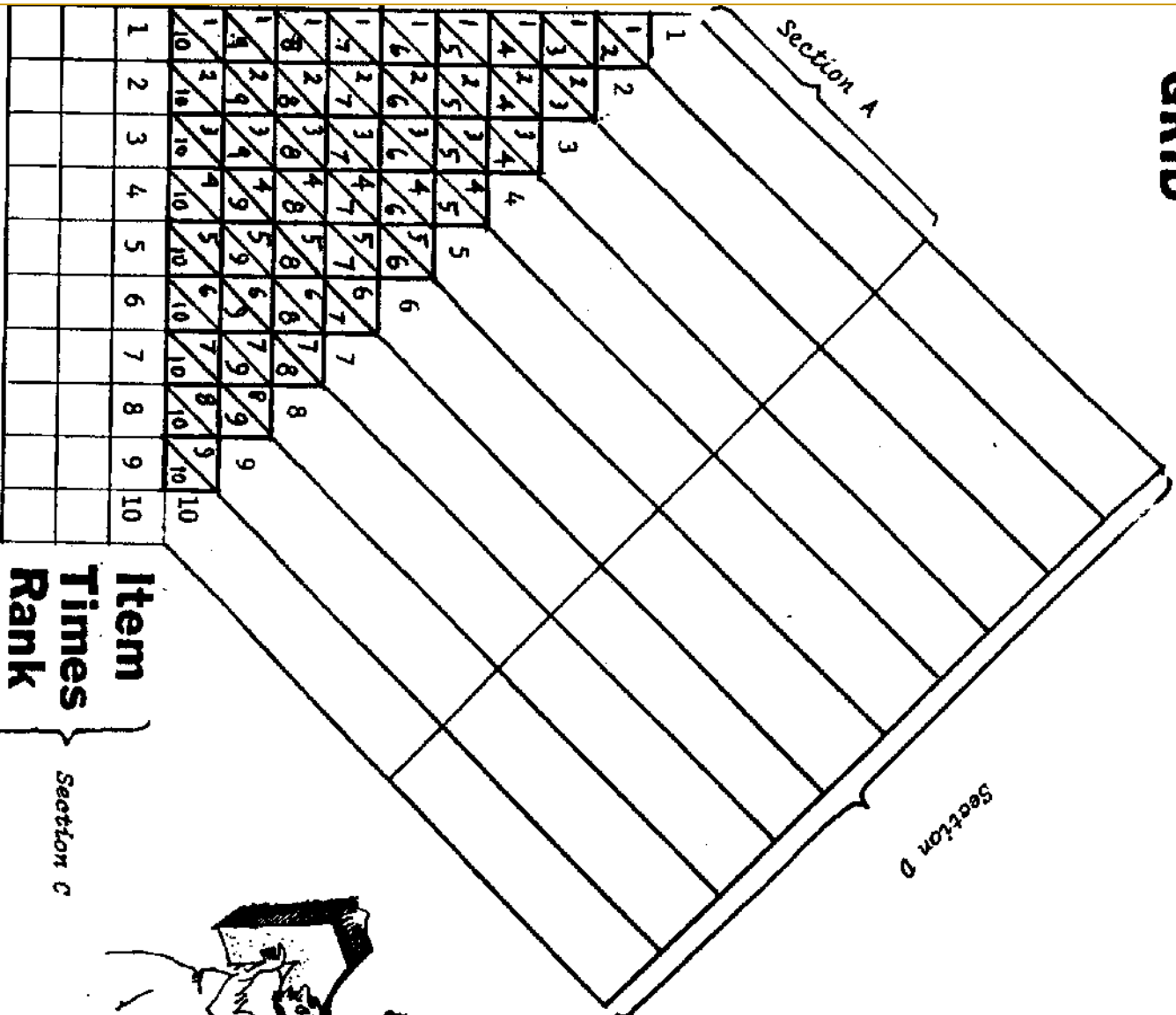
Using a Priority Grid

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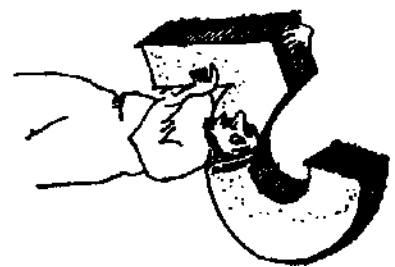
Often, one of the most difficult tasks facing co-op Boards and Committees is the selection and ranking of priorities. When structured properly, this daunting task is simplified by the use of a priority grid. A priority grid is a tool designed to make this process easier by allowing the participant to choose between two priorities at a time, ranking each choice against all priority choices.

PRIORITY GRID



Item Times Rank

Section C



Using a Priority Grid

1. Insert the items to be prioritized, in any order in Section A.
2. Then compare two items at a time, circling the one you prefer among the two in Section B.
3. Then count the number of times each item was circled and write this down in Section C. This determines the item's ranking; the item that is circled the most is #1, the next most circled is ranked as #2, etc.
4. If two items are circled the same number of times, look back in Section B to see when those two items were compared; give the item that you preferred an extra half point.
5. Then complete the rank order and enter the results in Section D.

How do you evaluate?

- Daily or Continuously
The One Minute Manager
- Self-Evaluation Process (Info from
the National Center for Nonprofit
Boards (800-883-6262))

Daily or Continuous Evaluation

- The One Minute Manager

- i. Make sure a person knows what is expected of him/her (tasks defined, jobs described, etc.)

- Make sure a person can do what is expected of him/her (have the knowledge, skills, and resources to do the tasks, jobs).***

- ii. Tell him/her when he/she does it right – **praise.**

- iii. Tell him/her when he/she does it wrong – **reprimand.**

How do you do a PRAISE or REPRIMAND?

1. Go to him/her immediately, don't wait
 2. Tell him/her exactly what they did or didn't do
 3. Tell him/her how it made you feel
 4. Pause so they can feel how you feel
 5. Tell him/her why it is good for the community for them to **continue the behavior, if praise** or **change behavior, if reprimand**
 6. Let him know that he is OK as a person
 7. Shake hands or touch in an appropriate way.
- When it is over it is over. Possibly make notes for annual evaluation

The Benefits of Evaluation

- Refresh Board's and Management's understanding of role and responsibilities
- Identify important areas of operation that need attention or improvement
- Measure progress toward existing plans, goals and objectives
- Shape the future structure and operations of the board and management

The Benefits of Evaluation

- Define the criteria for effective and successful management
- Build trust, respect, and communication among board members and with management.
- Enable management to work more effectively with board as part of a team.

Evaluation Process

- Assess Board Readiness
- Gain Board Commitment
- Appoint a Steering Committee
- Select a Facilitator
- Seat a Retreat Date
- Distribute the questionnaire and Collect Responses

Self-Evaluation Process

- Analyze and interpret the Questionnaire Data
- Establish the Retreat Agenda
- Hold a Self-Assessment Retreat
- Implement Action Plans

Summary

- An individual or a board can be motivated to positive action by providing continuous, effective feedback.
- If your organization is ready, then do the self-evaluation.

Management Evaluation Checklist

(This checklist was developed by the Midwest Association of Housing Cooperatives, a member of NAHC)

I Management Contract

Circle One

- | | | | |
|----|--|-----|----|
| 1 | Does the Board have a copy of the contract and management plan? | Yes | NO |
| 2 | Are all Board members familiar with the provisions of the contract? | Yes | NO |
| 3 | Is the contract reviewed at least quarterly to insure management compliance with all provisions? | Yes | NO |
| 4 | Does the Board have a copy of the management's fidelity bond with the co-op as additional insurer? | Yes | NO |
| 5 | Does the Management pay all expenses called for in the contract? | Yes | NO |
| 6 | Does your contract permit the Board to terminate the contract within 90 days or less? | Yes | NO |
| 7 | Does the contract provide a clear statement of services and fees? | Yes | NO |
| 8 | Is the manager on site as contracted? | Yes | NO |
| 9 | Is the contract individually tailored to the co-op's needs? | Yes | NO |
| 10 | Does the contract call for written monthly reports from managers? | Yes | NO |
| 11 | Does the manager have errors and omissions insurance? | Yes | NO |

Management Evaluation Checklist

(This checklist was developed by Vernon Oakes)

II Management Manages Employees

Circle One

- | | | | |
|----|--|-----|----|
| 1 | Does the agent hire, pay, supervise, train, evaluate and when necessary discharge the employees that work for the project? | Yes | NO |
| 2 | | Yes | NO |
| 3 | | Yes | NO |
| 4 | | Yes | NO |
| 5 | | Yes | NO |
| 6 | | Yes | NO |
| 7 | | Yes | NO |
| 8 | | Yes | NO |
| 9 | | Yes | NO |
| 10 | | Yes | NO |
| 11 | | Yes | NO |

Management Evaluation Checklist

(This checklist was developed by the Midwest Association of Housing Cooperatives, a member of NAHC)

III Management Reports

Circle One

- | | | | |
|---|--|-----|----|
| 1 | Are management reports up-to-date? | Yes | NO |
| 2 | Do the Board members receive the manager's monthly reports at least three days before meetings? | Yes | NO |
| 3 | Does the Board receive monthly reports on finances, vacancies, move-outs, move-ins, delinquency and maintenance? | Yes | NO |
| 4 | Does the Board read reports before meetings? | Yes | NO |
| 5 | Does the Board receive monthly reports on actions and status of Board directives? | Yes | NO |
| 6 | Is the manager responsible for the content of the reports? | Yes | NO |
| 7 | Does the report give contacts and sales of units? | Yes | NO |
| 8 | Does the manager make a presentation on the reports to the Board? | Yes | NO |
| 9 | Do Board Members understand the monthly reports? | Yes | NO |

Management Evaluation Checklist

(This checklist was developed by the)

VI Communications

Circle One

- | | | | |
|----|--|-----|----|
| 1 | Is the Board President the only official communicator with the manager between meetings? | Yes | NO |
| 2 | Do individual Board members abstain from making special requests of management? | Yes | NO |
| 3 | | Yes | NO |
| 4 | | Yes | NO |
| 5 | | Yes | NO |
| 6 | | Yes | NO |
| 7 | | Yes | NO |
| 8 | | Yes | NO |
| 9 | | Yes | NO |
| 10 | | Yes | NO |

Management Bonus for HUD Property

Operations and Administration

	Description of Task	Measure	Bonus Measure	Penalty
1	Management Operating Review	Satisfactory	0.10% Unsatisfactory	-0.10%
2	Files in order	97% or more of Current files are in order	0.05% less than 97%	-0.05%
3	Waiting List is managed to HUD's standards	It is	0.10% it isn't	-0.10%
4	Certifications and Recertifications	Complete and accurate 97% of certifications	0.10% less than 97% certifications	-0.10%
5	Monthly Reports to property and agencies	Complete and accurate 95% of the time	0.10% less than 95% of the time	-0.10%
6	Collections (considering Vacancy and Delinquency)	Collect 95% or Higher of Approved Rent Roll	0.10% Collect less than 95% of Approved Rent Roll	-0.10%
7	Expenses Not including Capitol Improvement or Mortgage	Actual Expenses less than 105% of Budget	0.10% Actual Expenses more than 105% of Budget	-0.10%

Management Bonus for HUD Property

Facilities Maintenance

	Measure	Bonus	Measure	Penalty
8	REAC Inspection Score 80 or higher	0.10 %	score less than 80	- 0.10%
9	Work Orders - Normal 98% or more completed within 5 days	0.05 %	less than 98% completed in 5 days	- 0.05%
10	Work Orders - Emergency 95% or more completed within 1 day	0.05 %	less than 95% completed in 1 day	- 0.05%
11	Vacant Unit Ready for Occupancy Complete Turn within 7 Days	0.10 %	Complete Turn in more than 7 Days	- 0.10%

Management Bonus for HUD Property

Financial Planning and Analysis

	Measure	Bonus Measure	Penalty
12 Detailed budget complete by Nov. 15, of each year	Completed with Board input	0.05% Not complete or no board input	-0.05%
13 Insurance, Reserve Analysis, and Utility Review	Completed	0.10% Not completed	-0.10%

Education/Training

14 Each site staff member is being certified	Each staff member is making progress	0.05% Each staff member is not making progress	-0.05%
15 The board and members are being trained	Yes through NAHC, PAHC, CAI or other	0.05% No	-0.05%
		1.20%	-1.20%