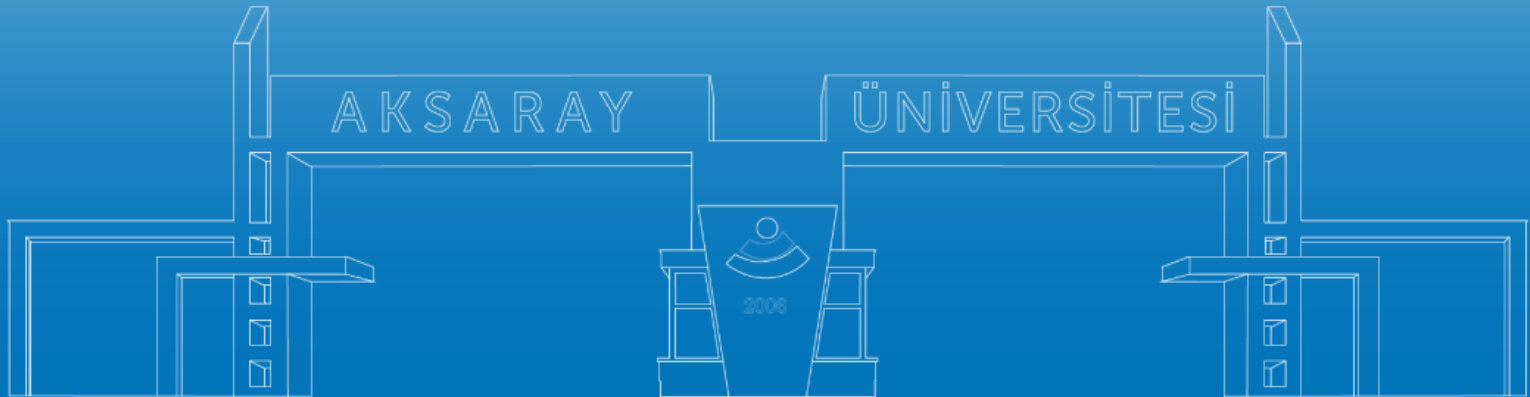




PROJECT MONITORING TOOLS

Associate Professor Hüsnü BİLİR



PLAN

- What is Project Monitoring?
- Project Monitoring Tools
 - *Observation*
 - *Employee Survey*
 - *Baseline Measurement*
 - *Benchmarking*
 - *Feedback Form/Sheet*

AIM OF THE PRESENTATION

- Stimulating participants to apply effective and deliberative techniques during sport events and volunteering periods by transferring monitoring tools to the participants.

PHASES IN THE PROJECT MANAGEMENT PROCESS

- ❑ Project monitoring comes as step four — following initiation, planning, and the beginning of execution.
- ❑ Once the project execution begins, project monitoring also commences.
- ❑ But what exactly is project monitoring?

PROJECT MANAGEMENT: 5 STEPS AND PHASES



WHAT IS PROJECT MONITORING?

□ *The Project Monitoring is the assessment or observation of the actual status and performance to ensure the project goals and targets.*



WHAT IS PROJECT MONITORING?



- Actual state of a project/programme/policy



Compare



Expected Results

PROJECT MONITORING

- ❑ Monitoring is a feedback mechanism.
- ❑ It involves tracking a project's metrics, progress, and associated tasks to ensure everything is completed on time, on budget, and according to project requirements and standards.



THE IMPORTANCE OF PROJECT MONITORING

- ❑ Goals are important for any project because they act as a guide.
- ❑ But just setting an objective isn't enough. You need to make it a point to check if you're meeting them.
- ❑ Project monitoring is all about comparing actual performance to the goals you set. If you're not hitting milestones (e.g., delivering a prototype within a specified time), the project has a high risk of failure.



KEY BENEFITS OF PROJECT MONITORING

- Ensuring that tasks are being carried out according to project requirements (quality control)
- Letting the PM make sure important deadlines are met
- Providing a thorough perspective on employee workload and capacity
- Allowing for project changes or remedies in case of problems
- Offering clear budget tracking and adherence
- Encouraging accountability from both team members and stakeholders

Milestones of Project Monitoring

- ❑ **Project Baseline Confirmation:** Before you get started with any active monitoring, the project manager will want to understand the project's scope, budget, and timeline. This provides a benchmark for success throughout the completion of the project.
- ❑ **Change Control Integration:** You must be keeping track of resource considerations (budget, timeline, etc.) throughout the monitoring process. Ensure you're creating and recording ongoing documentation and any required follow-ups regarding project changes.
- ❑ **Schedule and Cost Control:** This is where schedules and costs are monitored closely. When you think of project monitoring, this is most likely what you think of first. Deadlines are tracked and followed-up on if necessary, and budgets are consistently watched.

Milestones of Project Monitoring

- ❑ **Quality Control:** A project can be done on-time and on-budget, but if it's not what the stakeholder wants or the quality of the work is poor, it's of little value to anyone. Quality control is an essential part of the project monitoring process. This is where specific project results are looked at in comparison to established quality standards. If issues are found, changes are requested and made.
- ❑ **Performance Reporting:** This is like a report card for the project. Performance reporting consists of collecting and sharing any data related to project performance in relation to baseline goals and standards. Here you'll create and find status reports, progress notes, and future forecasts (using collected data).

PROJECT MONITORING TOOLS

Observations

**Employee
Surveys**

**Baseline
Measurement**

Benchmarking

**Feedback
Forms/Sheets**

OBSERVATION

- ❖ In project management, it is necessary to determine the work required to complete the project.
- ❖ One of the tools that are used to define and control what is included in the project is the technique called observation.
- ❖ It is a technique that provides a way of viewing individuals –usually team members– in their own environment doing their tasks as well as carrying processes that are necessary for completing the task/s.

OBSERVATION

❖ Evaluators use observation and participant observation throughout the project cycle to gather data about project inputs, outputs, and outcomes.



Planning Observations

What Data to Collect

Figure out what data to collect, whether it's looking for **events, inputs, pain points, documenting processes.**

How to Make Observations

Decide how to make observations, whether it be **passive or active.**

Time for Observing the Process

Choose **the best time** for observing the process; you'll probably want to be present at a normal time and at peak operations to understand any stressors

Method of Data Collection

Pick a method of data collection, such as **note taking, voice recording, or taking a video.**

Three Types of Observations

- ❖ **Passive Observations:** Standing back, out of the way of the activity, and not engaging in the process would be passive observation.
- ❖ The analyst will just watch and take records without asking any questions to the operator or end users.
- ❖ This can work well for processes that should be intuitive.

Types of Observations

- ❖ **Active Observations:** When the analyst gets involved in the process in some way, this is active observation.
- ❖ This can be in the form of asking questions between actions or even taking an “apprentice” style role to get inside the action.
- ❖ You can use active observations to really get inside a process.

Participant Observations

- ❖ Observation allows the evaluator to see what is happening in the project.
- ❖ In contrast, participant observation refers to when evaluator participates as he or she observes, participating in project activities.
- ❖ As a participant, the evaluator gains a more in-depth understanding of project activities.

Participant Observation

- Participant observation gives us a unique understanding of the research or project community, as you get an intuitive understanding about the culture from participating in it.



Participant Observation

For evaluators, this includes what is culturally appropriate, what projects might work, how a project is working during its implementation, and what the impact of the project is.

Participant observation involves getting close enough to people so that they feel comfortable telling us about their lives.

Sports Fans in Different Cultures



The Benefits of Observations



**GETTING
RELIABLE DATA
AND
INFORMATION**



**MAKING A FULL
ASSESSMENT OF
THE
ENVIRONMENT**



**REASONABLY
LIGHT ON COSTS**



**CLEAR
STATISTICAL
OUTCOMES**

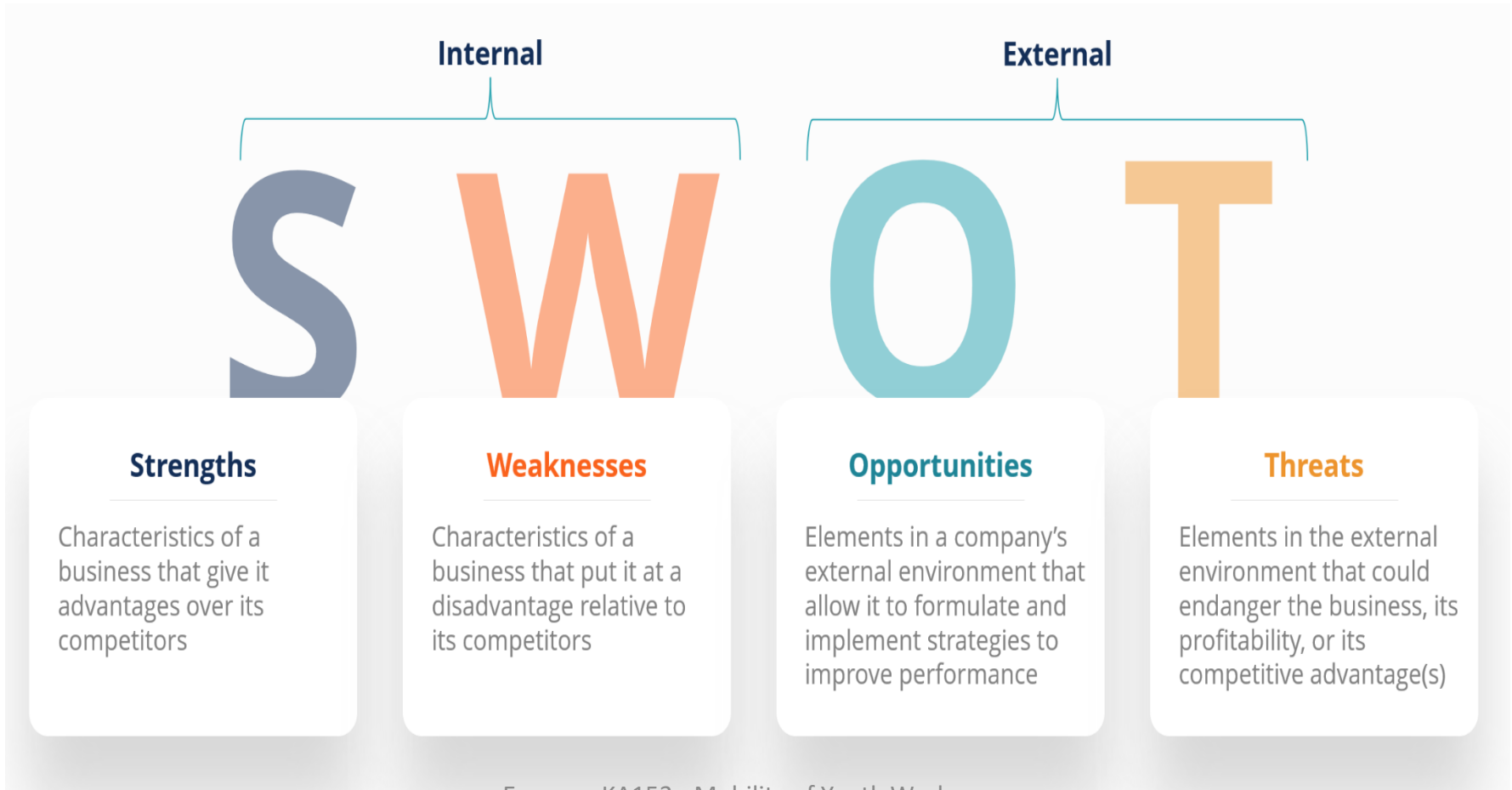
Some Things to be Wary of

Not all exceptions can be captured

Follow-up interviews will need to be carried out

There's a possibility of analyst bias

SWOT Analysis



EMPLOYEE SURVEY



- An employee survey is defined as a type of survey questionnaire to obtain opinions and reviews, and evaluate employee mood and morale, a degree of engagement.
- Employee surveys are meant to improve your business productivity by gathering information about the way your employees think about your company's processes, ethics, and mission.

EMPLOYEE SURVEY

- Today, 50-75% of organizations are determined to use employee surveys and implement changes suggested by employees to keep them engaged regularly and ultimately succeed.
- The average response rate to employee surveys is only 30%, while to get an accurate assessment of the climate of your organization, the response rate should be closer to 70%.



Benefits of the Employee Surveys

A carefully designed and conducted employee survey can reveal a **great deal of information about employee perceptions** that management can use to improve the workplace.

Organization responsiveness to employee feedback leads to **higher retention rates, lower absenteeism, improved productivity, better customer service and higher employee morale.**

The organization can send a positive message to employees that **their opinions are valuable.**

Managers can gain insights into issues affecting their departments or business units that allow them to **manage more effectively.**

Common Types of Employee Surveys



EMPLOYEE
SATISFACTION
SURVEYS



EMPLOYEE
ENGAGEMENT
SURVEYS



EMPLOYEE
CULTURE
SURVEYS



360° FEEDBACK
SURVEYS



Employee Satisfaction Survey

- Also known as employee morale survey, this survey is used to gather opinions that the management and human resources can use to build a positive environment for the employees.
- These surveys include questions that are crucial for the growth of an organization, such as employee loyalty, aspects of the organization that motivate them, and the scope of growth or training opportunities.

Employee Engagement Survey

- Employee engagement survey is implemented when an organization intends to monitor factors that contribute to its workforce performance.
- The survey questions can give the management a peek into an employee's perspective on changes in the organization, their motivation to be productive, how closely do they relate to the work culture and mission, etc.

Employee Culture Survey

- Also known as culture alignment survey, usually used in situations such as mergers and acquisitions or when there are structural changes in an organization.
- This survey is generally used to understand how an employee is involved in the organization's culture and growth.

360° Feedback Survey

- Feedback from the organization's staff is important. But in some cases, additionally, feedback from other sources such as supervisors, senior management, clients, etc., can be gathered using a 360° feedback survey.
- A 360-degree feedback survey gives multiple perspectives about an employee's performance based on which decisions about training, change of workload, and other factors that can further enhance an employee's performance can be made.
- 360-degree feedback surveys are instrumental in understanding the strengths and weaknesses of each staff member.

3 Key Principles of Employee Surveys

Keep it short and simple

Avoid "Double-barreled" Items

Ensure Anonymity and Confidentiality of Responses

Keep it Short and Simple

- Survey questions should be simple and short, using terminology familiar to all employees.
- Do not go after lengthy sentences or questions.
- Keep it to the point and easy to understand.



Avoid "Double-barreled" Items

- A survey question should not be "double-barreled"—two topics that are grouped into one question, even though they may be related.
- An example: "The pay and benefits are excellent at this company." Employees' responses may not yield useful information because they may think pay is great but not benefits, or vice versa, leaving leadership with no clear follow-up plan.

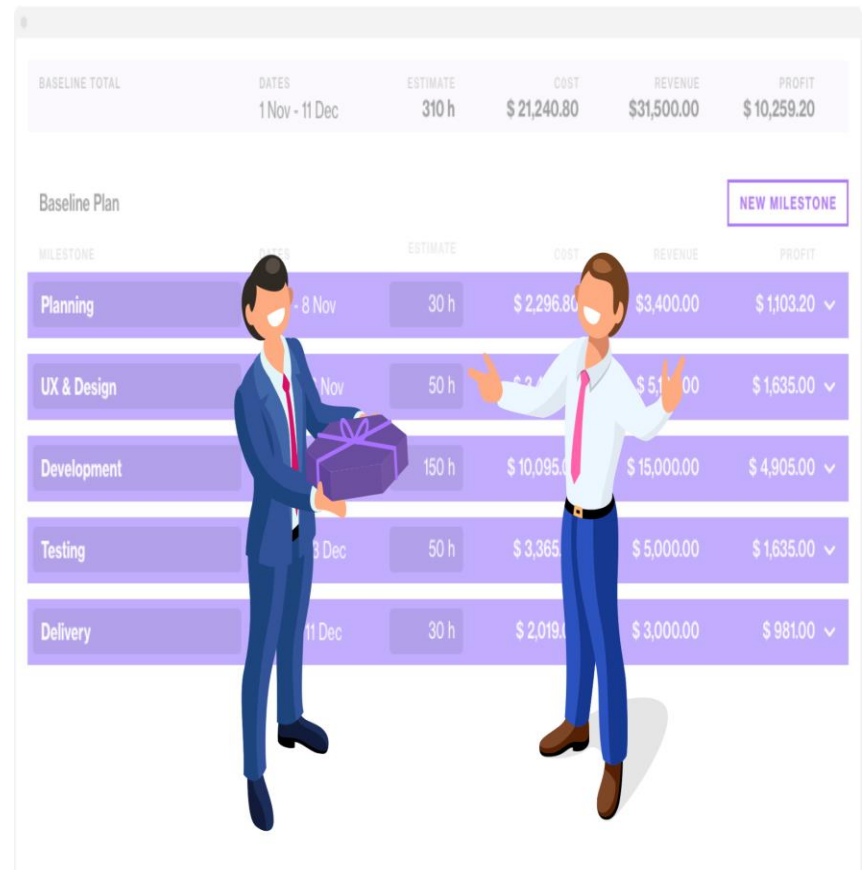
Ensure Anonymity and Confidentiality of Responses

- Leadership should advise employees from the outset that survey responses will be reported in aggregates only and kept confidential to ensure that everyone feels comfortable providing honest answers to the questions.



BASELINE MEASUREMENT

- ✓ In project management, before the project execution and monitoring start, it is essential to establish a baseline with clearly defined requirements, an accurate cost structure, and planning estimates.
- ✓ All this must be completely defined and documented before the actual activities of the project begin.



BASELINE MEASUREMENT

- The project baseline is an “instant photo” of the project taken at its initial moment.
- The goal of the project baseline is to see how far actual results have deviated from the initial reference plan.
- This allows you to assess the performance of your project over time.
- For example, let’s say your project is on target to finish in six weeks. Is that good or bad? If your schedule baseline has a four-week completion, you can tell that there is a problem, and your team may need to adjust speed up your progress.

What is it Used for?



PMB is generally used in controlling the scope, schedule and cost throughout the project.



The actual progress, measured through predefined indicators, is compared against the baseline.



The indicators used for this performance measurement are defined in the scope, schedule, and cost management plans.



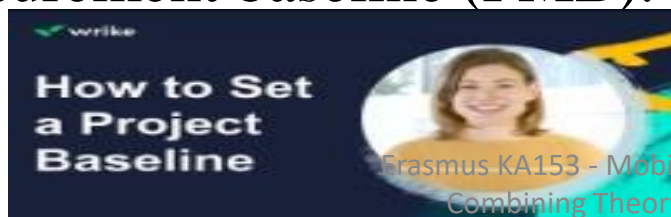
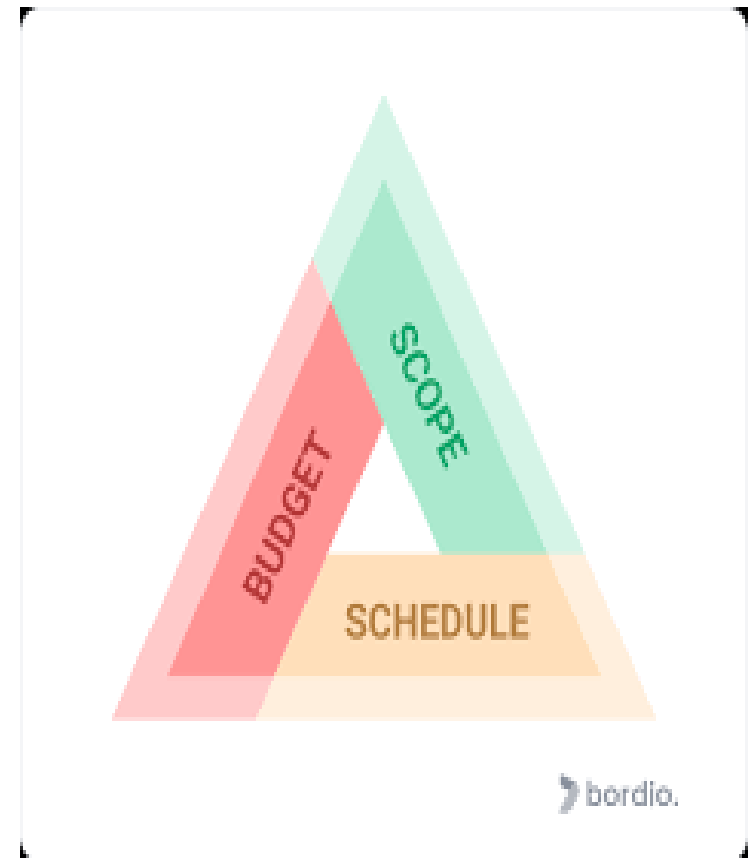
They can include, for instance, milestones, percentage of completed work or budget consumed.

Why are Project Baselines Important?

- ✓ The results of performance measurement inform the project manager as well as the stakeholders about the progress of a project as a whole and/or its components.
- ✓ Analyzing the performance of a project helps identify issues and obstacles in the project execution/delivery.
- ✓ If you analyze actual performance versus baselines for every project, you can see which areas typically under- or over-perform. Then, you can use that knowledge to make better estimates for future projects.

Performance Measurement Baseline

- A project baseline typically has three components: schedule, budget, and scope.
- Often, these three baselines are separately monitored, controlled, and reported to ensure each is on track.
- When fully integrated, it may be referred to as a performance measurement baseline (PMB).



Project Scope Baseline

- ✓ The Project scope baseline includes two steps:
 - ✓ **Project scope statement** which includes the work that will be done throughout the project and requirements of the work as well.
 - ✓ **Work Breakdown Structure** shows the hierarchy of the activities, components, and work packages that will help to complete the overall project work.

Project Schedule Baseline

- ✓ Project schedule baseline describes the agreed on the schedule of the project.
- ✓ It includes start and end dates of each activity.
- ✓ It provides milestones in the project, and the duration of the project and completion date of the project can be checked from the schedule baseline.

Project Budget Baseline

- ✓ Project budget baseline is the budget allocated to project activities (based on cost estimates).
- ✓ It provides time-phased cost budget.
- ✓ The amount of money that will be spent throughout the project is detailed with the dates that payments will take place and amount that will be paid.

Can a Performance Measurement Baseline be Changed?

- ✓ The project baseline can be changed, but it is not an easy process.
- ✓ If a baseline changes too frequently and there are too many deviations from it, this can be considered misleading.
- ✓ Deviations from the project baseline are often due to incomplete or incorrect risk identification.
- ✓ If the project's performance does not meet the baseline, the project manager should consider taking further action.
- ✓ The PMB needs to be updated only if changes of the scope, timeline or budget become necessary. Once the respective change requests have been approved, they need to be reflected in the 3 baselines and subsequently in the performance measurement baseline.

Example of a Project Measurement Baseline

- ✓ You will create a social media campaign to coincide with the launch of a new sport product for para-athletes. You are allotted a project budget, and your goal is to build brand awareness and encourage early sales of the product.
- ✓ Your project baseline could look something like this:
 - ✓ **Scope/deliverables: 500 direct sales**
 - ✓ **Schedule: One month**
 - ✓ **Budget: 100,000 Euro**
- ✓ In this project baseline example, you must first outline all the tasks needed to improve your conversion rate and achieve the end goal of 500 sales. This would include plans for social media posts for various platforms with detailed copy and design briefs.
- ✓ You can then map out your schedule in a content calendar, including optimized dates and times for each post.
- ✓ Finally, create a detailed budget to divide your costs across various sectors, e.g., *Pay per Click (PPC)* fees for Facebook ads.

BENCHMARKING

- ❑ Benchmarking is the comparison of planned or actual processes, practices, and operations to other comparable organizations. It is often done to identify best practices that can be implemented within the organization to generate improvement of their project management venture.
- ❑ The dimensions that are measured during benchmarking usually involve time, cost and quality.



BENCHMARKING



- ❑ In the process of benchmarking, management identifies the best firms in their industry, or in another industry where similar processes exist, and compare the results and processes of those studied (the "targets") to one's own results and processes.
- ❑ In this way, they learn how well the targets perform and, more importantly, the business processes that explain why these firms are successful.
- ❑ According to *Bain & Company's* 'Management Tools and Trends', benchmarking is one of the top 10 management tools that has remained consistent since 1993.

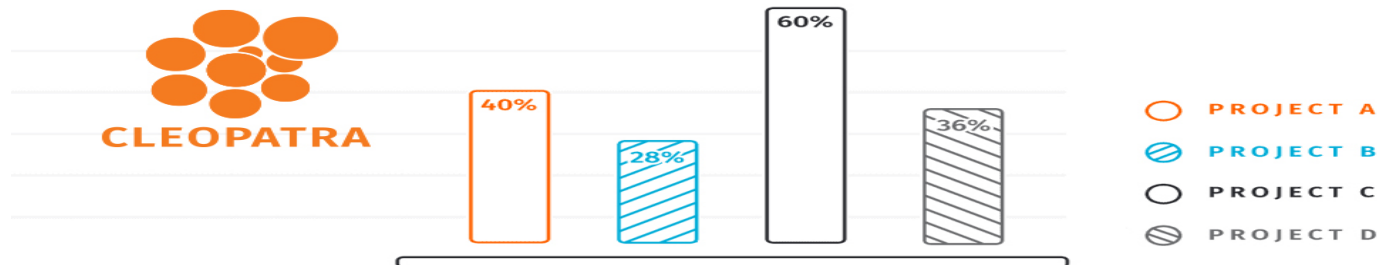
Benchmarking Methods



Available techniques for benchmarking involve surveys, quantitative research, marketing research, process mapping, financial analysis and review cycles.



All of these are necessary to determine novel practices that can be adapted to the organization.



Benefits of Benchmarking in Project Management

Assessment

- Project managers and team members get the performance feedback necessary to succeed in their role and make the right decisions.

Accountability

- Using benchmarking improves collaboration with stakeholders and holds project teams accountable to results.

Identify process gaps

- The practice sheds light on potential risks and problems with the process. Businesses can address these issues, so they aren't a hurdle in future projects.

Continuous improvement

- Benchmarking ensures that decision-makers are aware of what's working and what's not, so that they can make improvements.

Project Management Benchmarking Metrics

Budget performance

Client satisfaction

Degree of project risk

Employee satisfaction

Number of scope changes

Projects completed

Project cost

Project quality

Returns on investment

Schedule performance

Erasmus KA153 - Mobility of Youth Workers -

Confronting Theory and Practice for

Volunteering in Sport

Limitations of Project Benchmarking

- ❑ A lack of internal data gathering and analysis capabilities.
- ❑ A lack of technical expertise and infrastructure to determine accurate performance metrics.
- ❑ Misuse of data, especially if it is biased or it's not transparent. That can lead to inaccurate comparisons and assumptions in favor of specific outcomes rather than actual performance.
- ❑ Projects that vary by scope and process, meaning what you learn from benchmarking one project might not apply to future endeavors.

FEEDBACK FORMS/SHEETS

- ❖ After the successful completion of a project, it requires feedback from stakeholders/customers in the company.
- ❖ While this is crucial in ensuring quality delivery, it becomes essential to improve inner procedures that collect feedback from individual contributors.
- ❖ This inner questionnaire on project feedback is an important component of what is called ‘Project Closure Activities.’
- ❖ For better and improved feedback, feedback report templates are available to make the process easier and faster.

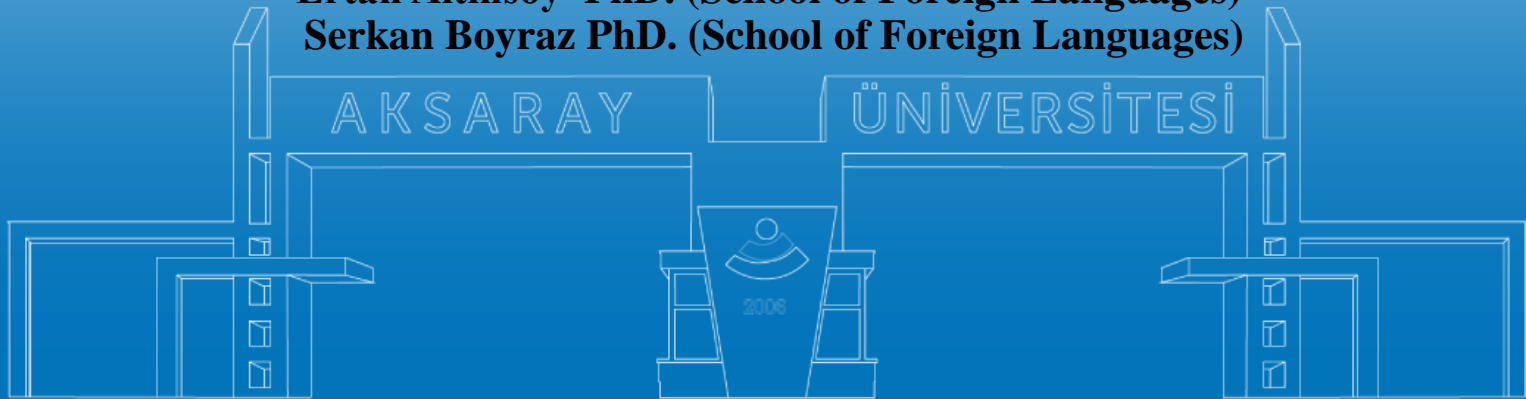


Erasmus KA153 - Mobility of Youth Workers -
Combining Theory and Practice for
Volunteering in Sport



PROJECT CYCLE MANAGEMENT (PCM) EVALUATION PROCESS

Ertan Altınsoy PhD. (School of Foreign Languages)
Serkan Boyraz PhD. (School of Foreign Languages)



By the end of this training you will be able to:

- Define what evaluation is,
- Realize why evaluation is necessary to evaluate progress
- familiar the with popular performance evaluation methods.

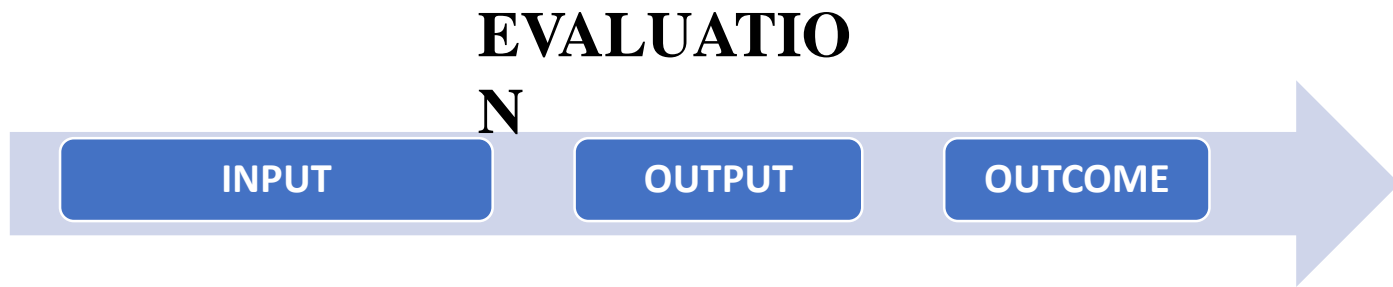
DEFINITIONS:

Volunteering involves all forms of voluntary activity in any location, whether formal or informal, full-time or part-time, occurring regularly or sporadically.”

DEFINITIONS:

Evaluation involves analysing the information you have collected to answer questions about how well the volunteer programme is doing, and to identify any gaps and improvements you can make.

DEFINITIONS:



EVALUATION PROCESS:

INPUT: time, money, and resources that enable you to operate your volunteer program.

OUTPUT: quantitative measures such as facts, figures and statistics (HARD DATA)

OUTCOMES: changes that the volunteer programme has made to the organisation and its members, and includes qualitative impacts such as enabling clients to develop new skills and boost their confidence (SOFT DATA)



Outputs and outcomes are measured by performance indicators, which help you assess how well your volunteering programme is doing.

WHY TO EVALUATE PROGRESS?

- Monitor where the volunteering program is at,
- Reflect on the quality of the current program,
- measure to what extent you are meeting any specific aims of your volunteer programme
- identify the impact that volunteers have on your organisation, both in terms of their contribution and their economic value

WHY TO EVALUATE PROGRESS?

- Identify areas in your volunteer programme that may need improvement
- Discuss volunteer success and build self-esteem,
- Build credibility within the community,

TYPES OF EVALUATION

- Self Evaluation
- Behavioral Checklist
- 360 Degree Feedback
- Ratings Scale
- Evaluation by Objectives

TYPES OF EVALUATION

Self Evaluation

- an opportunity for the volunteer to judge his or her own performance based on predetermined criteria and questions that you provide
- **Purpose:** to take an honest look at own performance and areas of improvement

TYPES OF EVALUATION

Self Evaluation

- essential for recognising the strengths and weaknesses of volunteers and lead to quality improvement of their skills, respectively to their work.
- relies on improving the achievements in the organisation's own objectives through the professionalisation of decision-making

TYPES OF EVALUATION

Self Evaluation

Evaluation is considered self-evaluation if volunteers evaluate only their own role in the process that is evaluated.

Self Evaluation (Samples)



STUDENT SELF-EVALUATION OF VOLUNTEER/WORK EXPERIENCE

Student: _____

Program: *Graduation Transition Plan*

Placement: _____

Job Description: _____

Dates of Employment

From: _____

To: _____

Total Hours: _____

Please rate yourself by circling the number which best describes your performance for each of the criteria.

4	Outstanding	3	Good
2	Fair	1	Needs improvement
N/A (not applicable)			

GENERAL WORK SKILLS YOU HAVE DEVELOPED

<u>Personal and Social Aptitudes</u>					
Acceptance of constructive criticism	4	3	2	1	NA
Appearance	4	3	2	1	NA
Punctuality	4	3	2	1	NA
Attendance	4	3	2	1	NA
Courtesy (with public & workers)	4	3	2	1	NA
Dependability and responsibility	4	3	2	1	NA
<u>Work Qualities and Habits</u>					
Effort (initiative, eagerness, effectiveness)	4	3	2	1	NA
Dexterity (speed, accuracy, organization)	4	3	2	1	NA
Follow through (completing tasks, projects)	4	3	2	1	NA
<u>Communication Skills</u>					
Verbal (speaking clearly)	4	3	2	1	NA
Listening (able to follow directions)	4	3	2	1	NA
Questioning (asking appropriate questions)	4	3	2	1	NA
Non-verbal (eye contact, body language)	4	3	2	1	NA
Written (writing clearly, concisely, & legibly)	4	3	2	1	NA

Specific Work Skills Learned During Volunteer/Work Placement

What have you learned from this experience that you can or will apply in the future?

Student Signature: _____

Date: _____

Self Evaluation (Samples)



Name& Surname: Date:

1. What have you enjoyed most about volunteering?
2. What did you find most challenging / what would you do differently?
3. Was the estimated time to accomplish your volunteer work realistic?
4. Did the Friends provide adequate orientation, training, supervision and resources for you to accomplish your job?

Comments and suggestions for improvement:

5. Were other volunteers and staff receptive and appreciative of your volunteer work?

Comments:

6. I would rank my performance as:
 - o Superior, exceeding expectations
 - o Excellent, met expectations
 - o Needing improvement, did not meet expectations

Comments to explain above answer:

7. What type of work and time commitment do you desire for next year? (i.e., same position, new challenges, departure, etc.)
8. What suggestions do you have for ways to improve the volunteer program?
9. How likely are you to recommend the volunteer program to others?
 - o Very likely
 - o Somewhat likely
 - o Not very likely

10. Other comments, suggestions, etc.



TYPES OF EVALUATION

Self Evaluation




WORKSHOP

TYPES OF EVALUATION

Self Evaluation

WORKSHOP

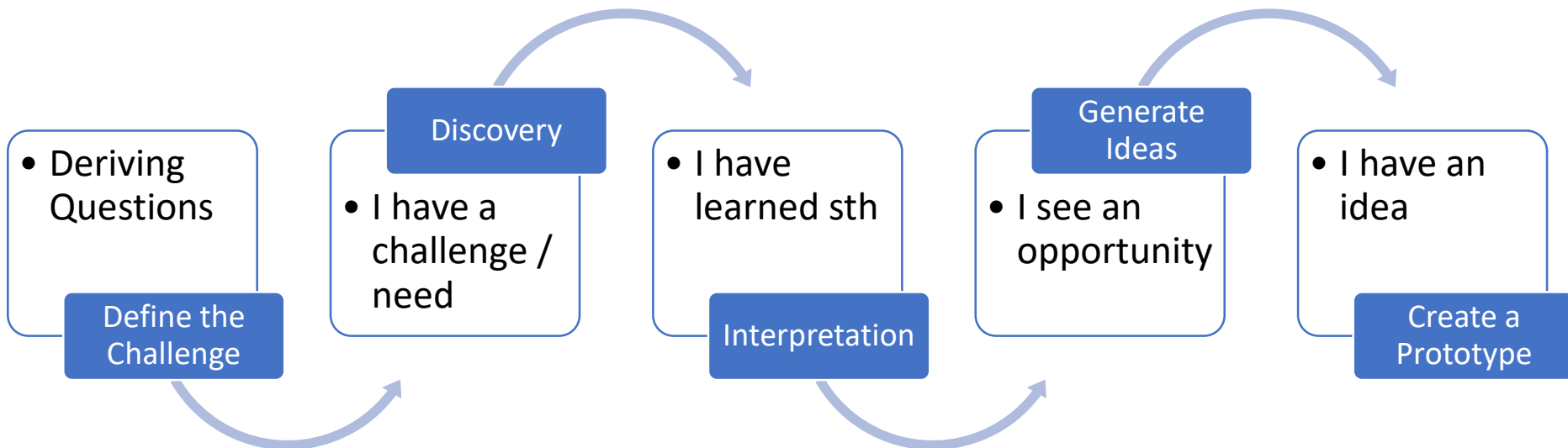
MODEL

DISCOVER	DEFINE	DEVELOP	DELIVER
SKILL DESCRIPTION 	ELEMENTS 	ASSESSMENT GUIDE 	QUALITY CRITERIA
Capabilities	Action indicative skill/ behaviour	Indicators	How well?

TYPES OF EVALUATION

Self Evaluation

WORKSHOP THE PROCESS



TYPES OF EVALUATION

Self Evaluation

WORKSHOP-Stage 1:SKILLS DESCRIPTION-CAPABILITIES/DISCOVER

Challenge: to identify their skills by using self-evaluation and group comparison: identifying current skills by reflecting on your past and current performance as a volunteer and in comparison with the experiences of other volunteers

INSTRUCTIONS (Use the given template)

Form a circle, and then follow the guidelines below:

- Take some minutes to think about a situation where as a volunteer you actively engaged in solving a problem or performing a specific task and identify the skills you have used and the ones that you could have used.
- One by one share them with the group.
- Note the same things for the other volunteers,
- Comment on the skills that your peers used or could have used in the situation they described.

TYPES OF EVALUATION

Self Evaluation

WORKSHOP-Stage 2:ELEMENTS/DEFINE

Evaluate your current skills

You have already identified a list of skills emerged from your previous experiences. Now, have a look at the set of skills below:

1. CONFLICT RESOLUTION
2. RESPECT
3. ACTIVE AND PASSIVE COMMUNICATION
4. CRITICAL THINKING
5. EMPATHY AND ALTRUISM
6. INTERCULTURAL UNDERSTANDING
7. DIGITAL COMPETENCE
8. ADAPTABILITY
9. TEAM WORKING
10. ASSESSMENT AND RECOGNITION OF ONE'S SKILLS
11. TIME MANAGEMENT
12. PROBLEM-SOLVING
13. TAKING INITIATIVE
14. ORGANIZATIONAL SKILLS

TYPES OF EVALUATION

Self Evaluation

WORKSHOP-Stage 2:ELEMENTS/DEFINE

Evaluate your current skills

See if the skills you have identified coincide and/or fit with those on the list, insert them using the skills number in the 14 skills column of THE TEMPLATE GIVEN and discuss together the reason why you have inserted the skill you have identified under on the 14 skills. Afterwards, individually proceed with the self-evaluation of Exercise 2.

TYPES OF EVALUATION

Self Evaluation

WORKSHOP-Stage 2:ELEMENTS/DEFINE

Evaluate your current skills

- With a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) volunteers discuss strong and weak aspects in their skills and work, and also their main opportunities and threats. The main goal is to enhance or keep the strengths and eliminate the weaknesses and threats that create weaknesses.
- Complete the table of Template 2 by using the skills listed above by either inserting them in the table or using them as your main reference in answering the open questions.

TYPES OF EVALUATION

Self Evaluation

WORKSHOP-Stage 3:ASSESSMENT GUIDE/DEVELOP

Future skills for volunteering

- Select the skills that you think are most appropriate and complete the given table by ticking with an X the degree of competence he/she should have Note that the table describes a “good” volunteer, not a “perfect” one. A good volunteer already has relevant skills but has always things to improve. On this stage volunteers can develop a plan for achieving and training the future skills they need to develop

TYPES OF EVALUATION

Self Evaluation

WORKSHOP-Stage 4:QUALITY CRITERIA/DELIVER

Future skills for volunteering (Use Template 3)

- On the left column make a list of the skills for your future profile. On the right, score from one to ten each skill or competence, depending on how important it could be in relation to the work you are analysing. Once the document is done with the punctuation, match all the scores to get a line connecting the dots with a pen. This line represents the future skills you need for this activity or organization.

TYPES OF EVALUATION

BEHAVIORAL CHECKLIST

A behavioural checklist is a quantitative and subjective analysis - conducted by the leader or manager - of how closely an volunteer's behaviors align with voluntary work requirements.

TYPES OF EVALUATION

BEHAVIORAL CHECKLIST

In these reviews, the manager or leader responds to a list of carefully worded yes-or-no questions that relate to desired behaviors. Each question is given a weighted value, and the answers are then measured to see where they fall within predefined grading criteria

BEHAVIORAL CHECKLIST (Samples)



Erasmus+



VOLUNTEER PERFORMANCE EVALUATION

Name: _____

Supervisor: _____ Date: _____

Volunteer Vision Statement: We celebrate the unique contributions of our volunteers who join us as steadfast ambassadors of XYZ Organization and leaders in providing [services].

The purpose of this evaluation is to help our volunteers work to their greatest potential and to help XYZ better involve volunteers in participating in their success at XYZ.

Please assess the above named volunteer by considering the following competencies and key behaviors. [This statement can be directed toward either staff or a volunteer who does a self-assessment.]

Please rate each item as Excellent, Good, Fair, or Poor, and feel free to include your comments in the appropriate section.

	EXCELLENT	GOOD	FAIR	POOR	COMMENTS
1. Adheres to XYZ's policies					
2. Adheres to XYZ's policies					
3. Desires to grow and learn					
4. Displays integrity					
5. Displays appropriate enthusiasm and/or attitude					
6. Follows instructions					
7. Gives and takes feedback well					
8. Handles difficult situations effectively and appropriately					
9. Handles difficult people [visitors, volunteers, staff] effectively and appropriately					
10. Leads when appropriate					
11. Conducts him/herself in professional manner at all time					
12. Manages time efficiently					
13. Quality of work performed					
14. Punctuality/Attendance					
15. Respectfulness					
16. Respects confidentiality					
17. Responsiveness					
18. Self-motivated					
19. Shares XYZ's mission					
20. Concern for participants [clients, visitors, customers, etc.]					
21. Willing to help where needed					

Thank you for completing this evaluation. Please return it to XXXXX by XXXX date. The results will be shared with the volunteer and staff partners.

Self Evaluation (Samples)

Name& Surname: Date:

1. What have you enjoyed most about volunteering?
2. What did you find most challenging / what would you do differently?
3. Was the estimated time to accomplish your volunteer work realistic?
4. Did the Friends provide adequate orientation, training, supervision and resources for you to accomplish your job?

Comments and suggestions for improvement:

5. Were other volunteers and staff receptive and appreciative of your volunteer work?

Comments:

6. I would rank my performance as:
 - o Superior, exceeding expectations
 - o Excellent, met expectations
 - o Needing improvement, did not meet expectations

Comments to explain above answer:

7. What type of work and time commitment do you desire for next year? (i.e., same position, new challenges, departure, etc.)
8. What suggestions do you have for ways to improve the volunteer program?
9. How likely are you to recommend the volunteer program to others?
 - o Very likely
 - o Somewhat likely
 - o Not very likely

10. Other comments, suggestions, etc.

TYPES OF EVALUATION BEHAVIORAL CHECKLIST

WORKSHOP

- Make a group of 6 people each of whom from different nationality
- Imagine your group is an organization or an NGO helping those with disabilities and you have volunteers working for your organization.
- Brainstorm on the soft skills that you want your volunteers to attain and create a list of criteria as basis for your checklist.
- Create the behavioral checklist as the final step.
-

TYPES OF EVALUATION

360 Degree Feedback

- known as multi-source or multi-rater feedback assessment.
- is used to evaluate multiple volunteers and the effectiveness of the program.
- **Purpose:** help the volunteer develop and more fully realize his or her potential and to help the organization more effectively involve its volunteers

TYPES OF EVALUATION

360 Degree Feedback

Benefits

- The ability to enhance communication between volunteers and organization.
- Volunteers gaining a clearer understanding of their roles.
- A stronger program.
- More effective use of leader and agent skills.
- Increased prestige of volunteer leaders.
- **Improve retention of volunteers and volunteer leaders**

TYPES OF EVALUATION

360 Degree Feedback

How to Implement

Step 1: Defining what to Evaluate and Measure

- Define what you hope to accomplish with the program or activity

TYPES OF EVALUATION

360 Degree Feedback

How to Implement

Step2: Designing the Instrument Tool

- Develop a well-constructed instrument tool that targets a specific audience.
- Construct more than one evaluation instrument with specific questions on areas to measure.
- Generate questions written specifically to the evaluation level being assessed.
- Create appropriate response scales according to what you are trying to measure

TYPES OF EVALUATION

360 Degree Feedback

How to Implement

Step 3: Gathering Data

- In order to have a high rate of participation, offer the instrument tool in several different formats, such as newsletters, e-mail, and Internet. The instrument should include some open-ended questions to ensure that it is brief, yet comprehensive.

TYPES OF EVALUATION

360 Degree Feedback

How to Implement

Step 4: Analyzing Data and Summarizing Results

- Results can be evaluated using a simple excel spreadsheet or a commercial statistical software package. The evaluator should be able to generate basic data analyses needed to measure the results of the assessment.



TYPES OF EVALUATION

360 Degree Feedback

Sample

[PCM\360_degree_evaluations.pdf](#)

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- one of the most frequently used performance evaluation methods,
- lists desired traits and behaviors for each role, then rates volunteers on each of those on a numbered scale,
- provides an objective, quantitative picture of volunteer performance,
- gives a quick, subjective representation of perceived performance for core competencies

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **Advantages**
- Easy to understand and use,
- Quantifying behaviors makes the appraisal system easier,
- Inexpensive to develop

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **Disadvantages**
 - Subjectivity of different evaluators
 - Different types of biases
 - Difficult to understand employees' strengths



TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **How to use effectively**
- **1. Define your desired outcomes**
 - What do you want to measure?
 - What are your goals?
 - How will this data help the organization work towards the overall goals?

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **How to use effectively**
- **2. Try to use questions that are as objective as possible**
- Do you think the employee is excited to be at your organization? 
- How effective is the volunteer in their role? 

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **How to use effectively**

- **3. Use behavioral questions**

- For each role you want to use the graphic scale for, define the key desired behaviors,
- Go through each role, list the desired behaviors, and then create questions that help measure these behaviors most appropriately
- Eg: Should the volunteers be a team player? Should they be innovative and creative? Should they be friendly and personable ?

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **How to use effectively**

- **4. Get answers to reflect the questions**
 - Once you've determined your questions, the next step is to create appropriate answers for them
 - Eg: Does the volunteer deliver work on time and adhere to deadlines?
 - “late,” “on schedule,” and “ahead of schedule.”

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- How to use effectively

- **5. Combine it with other performance evaluation methods**
 - helps minimize limitations,
 - provides a more accurate insight into an volunteer's performance

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **Sample**

Performance Criteria	Rating				
	1	2	3	4	5
Productivity			X		
Quality		X			

1. Unsatisfactory
2. Below expectation
3. Satisfactory
4. Above average
5. Outstanding

TYPES OF EVALUATION

GRAPHIC RATINGS SCALE

- **Sample**

	Extremely poor	Bad	Average	Good	Excellent
Teamwork	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attention to detail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to meet deadlines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Initiative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

TYPES OF EVALUATION

Management by Objectives (MBO)

- one of the best methods for the judgment of a volunteer's performance, where the managers/leaders and volunteers set a particular objective and evaluate their performance periodically
- depends on accomplishing the goal rather than how it is accomplished

TYPES OF EVALUATION

Management by Objectives (MBO)

- employees from all levels participate together to fulfill the common organizational objective,
- tries to optimize the use of available resources to attain the defined objective
- provides a dynamic work environment as it allows freedom to attain the objective with the defined resources
- is goal oriented
- enhances job satisfaction in individual employees

TYPES OF EVALUATION MBO Process



TYPES OF EVALUATION MBO (Workshop)

- Make a group of 6 individuals. Each group is a sports organization providing service for physically disabled people. 2 people in the group are managers or leaders of the group and the others are the volunteers
- Each group will set their own MBO following the steps provided in the process and present to the audience.

TYPES OF EVALUATION MBO (Workshop)

- END OF THE PRESENTATION
- THANK YOU FOR YOUR ATTENTION