

**KINNA-AWEYA LEGAL CLINIC**  
**Policy 2.9 STAFF EVALUATION - Appendix D**  
**EVALUATION PROCEDURE**  
**DIRECTOR OF ADMINISTRATION**  
**AND CO-ORDINATOR OF LEGAL SERVICES**

**EVALUATION TEAM:**

The Evaluation Team shall be comprised of one member selected from the Board and one member selected by the staff of the Kinna-aweya Legal Clinic for the sole purpose of evaluating the Director of Administration and the Co-ordinator of Legal Services. Each position shall be evaluated annually.

At the first meeting of the Board following January 1<sup>st</sup> of each year, the Board will select a Board member as a representative on the Evaluation Team.

The staff will select a member from among the staff for the Evaluation Team. The name of the staff person will be submitted to the Board at their first meeting following January 1<sup>st</sup> each year.

The Evaluation Team shall commence the evaluation process on or about March 1<sup>st</sup> of each year and complete and submit their report to the board on or before April 15<sup>th</sup> of each year.

The Board in approving this procedure directs that all staff and Board members will cooperate fully with the Evaluation Team. The Board further directs that the Evaluation Team may use the facilities and support staff of the clinic as is necessary to fulfill their mandate.

All information provided to the Evaluation Team will be considered confidential and the Evaluation Team will not include the names of their sources when compiling their report. Names of sources will not be released without written permission from the person providing the information.

It is expected that the Evaluation Team will include the factual basis for any comments recorded whenever possible. It is not expected that the Evaluation Team will include any unsubstantiated, subjective, trivial or irrelevant comments when compiling their report. The Evaluation Team is given the responsibility to determine the objective reality of any situation, to the best of their ability, and report that information fairly and

honestly to the Board of Directors. This responsibility includes a duty not to withhold any information which is clearly relevant and ought to be included in their report.

The Board of Directors is interested in an honest, fair report for the purpose of ensuring that the clinic is managed in the best and most efficient manner possible. The Board recognizes that the Evaluation Team may, in the course of discharging their duties, be required to include negative or critical comments in their report and the Board expects this type of information to be presented in a clear and fair manner. The Board ensures that the Evaluation Team will not suffer any negative repercussions as a result of a fair and honest report and, in fact, the Board directs that, in the clinic's best interests, constructive criticism is expected. The Board takes full responsibility to ensure that anyone being evaluated has a fair opportunity to respond to any critical comments and that any action taken as a result of the evaluation report will be appropriate and fair.

### **EVALUATION PROCESS**

- The Director of Administration and the Co-ordinator of Legal Services shall each complete an Annual Progress Report to be submitted to the Evaluation Team on or before March 1<sup>st</sup> of each year.
- The Evaluation Team will complete a Performance Review Worksheet and arrange consultation sessions with appropriate persons as outlined on the Worksheet commencing on or about March 1<sup>st</sup> of each year.
- Upon completion of above, the Evaluation Team will present both the Annual Progress Report and Performance Review Worksheet for the Director of Administration and Co-ordinator of Legal Services to the Board no later than April 15<sup>th</sup> of each year.
- A copy of each worksheet shall be provided to the person being evaluated as soon as it has been completed.
- The Director of Administration and Co-ordinator of Legal Services shall meet with the Board as soon after the completion of the above is deemed necessary.
- The Board of Directors shall take appropriate action, if necessary.

Approved by the Board of Directors  
May 10, 1990

**KINNA-AWEYA LEGAL CLINIC**  
**PERFORMANCE REVIEW WORKSHEET**  
**CO-ORDINATOR OF LEGAL SERVICES (C.L.S.)**

**NAME:**

**COMMENCED EMPLOYMENT:**

**COMMENCED AS C.L.S.:**

**PERIOD COVERED BY REVIEW: FROM:**

**TO:**

**REVIEW CONDUCTED BY:**

**(STAFF)**  
**(BOARD)**

The Co-ordinator of Legal Services is responsible for all matter affecting the delivery of legal services by the Kinna-aweya Legal Clinic. The Co-ordinator of Legal Services is directed to take any and all steps necessary to ensure the efficient and effective delivery of quality legal services and to meet the goals and objectives of the Legal Clinic.

**Section I**

**Legal Work:**

**Casework/Case Management**

- interviewing skills
- information gathering
- issue identification
- file opening/closing records and procedure
- ensures the office's tickler system complies with Law Society of Upper Canada requirements
- use of tickler
- financial eligibility questionnaire, exception reports
- diarization, follow up, including file review follow up (planning and organization generally)
- regular personal file reviews
- use of file docket, legal disbursement records, documenting file activity generally
- use of appointment book

- use of precedent letters, precedent materials
- closing of completed files; rollover or splitting of appropriate files
- implementation of training
- oral/written communication skills and reading ability
- informal or formal advocacy skills
- research skills (if required)
- case conferences – requested when appropriate/prepared well
- problem solving skills
- exercises good judgment
- assumes responsibility
- meets deadlines
- able to work alone/as a team
- reliability/skills application generally
- appropriateness of size and mix of caseload

### **Legal Education/Law Reform**

- this involves preparation and presentation to a group generally
- communication and public speaking skills
- may involve a community organizing or development activity
- preparation of written material for distribution i.e. pamphlet

### **Supervision/Training**

- this will not include group training which will be evaluated as it occurs
- the E.T. will compile this topic based on input from those persons supervised or trained individually – the following will be addressed: regularity of file reviews; quality of file reviews – are clear instructions given and tasks divided clearly; is follow up prompt and reliable; is the supervisor accessible; are training needs identified, discussed and acted upon
- are appropriate files transferred to the supervisor
- use of file review check list
- hearing preparation – is appropriate assistance given
- able to communicate openly/honestly
- provides constructive criticism

## **Section II**

### **Human Relations:**

#### **Relationship with Clients:**

- able to communicate
- inspires confidence
- manages clients appropriately

#### **Relationship with Support Staff:**

- support staff input should be obtained and summarized by Evaluation Team
- clear instructions, deadlines
- courteous

#### **Relationship with Legal Staff:**

- able to work as a team (relating to legal work not role as C.L.S.)

## **Section III**

### **Commitment/Attitude to Job:**

#### **Personal Development:**

- goals/objectives are set and appropriate action taken

#### **Time Management:**

- appropriate techniques are identified and used to allow for efficient, effective use of time

#### **Reliability:**

- basically can be depended upon to handle work, follow through, achieve results within appropriate time frame

## **Section IV**

### **Relationship with Board:**

NOTE: In this section the E.T. will consult with senior board members and the chair to evaluate the C.L.S. and consider the following:

#### **Reporting to the Board at regular meetings**

- attends board meetings if possible
- thorough reporting
- clear and understandable summaries
- well prepared
- provides board with necessary material
- open/honest communications
- takes initiative when appropriate and consults with board when appropriate
- provides monthly statistics report to Board (file opening, summary advice, native/non-native, etc.) and reports quarterly to LAO

#### **Implementation of Board policies**

- reporting back on implementation
- follows up on directions of Board
- identifies for Board areas in which policy decisions are required

#### **Assists Board committees as required**

- i.e. hiring committees, salary committee

## **Section V**

### **CLINIC SERVICES**

NOTE: E.T. may consult with clinic staff, board members, and any interested parties in considering the following:

#### **Maintaining quality of legal services.**

- monitoring the services provided
- monitoring tickler system
- monitoring results clinic obtains for clients
- maintains trust account in accordance with Law Society standards

### **Determining appropriateness of services provided.**

- monitoring needs of target community
- implementing clinic policy
- prioritizing services required based on client/community needs, available funds and human resources
- ensures accessibility of legal staff to clients
- ensures compliance with financial eligibility guidelines

### **Relationship with staff.**

- assigns tasks to clinic staff
- supervises staff
- directs staff
- provides leadership
- consults through staff meetings and appropriate individuals
- assigns appropriate staff to priority tasks
- delegates appropriately
- monitors workload to ensure fair, equitable and well balanced distribution
- allows development of staff
- facilitates learning and provides challenges
- sets standards of performance for individual staff members
- evaluates staff fairly, honestly and openly
- development of evaluation procedure
- assumes responsibility
- availability for consultation
- monitors supervision provided by staff lawyers
- ensures that all files (including those of other staff lawyers) are regularly reviewed
- ensures that all staff have adequate training
- sets performance and training goals for all staff

## **Section VI**

### **Relationship with Director of Administration:**

NOTE: E.T. shall consult with D.O.A. in considering the following:

Keeps D.O.A. informed of all matters affecting the administration of the clinic.

- consultation as required
- is available as required
- co-operates in information sharing and planning
- able to work as member of management team

## Section VII

### Inter-Clinic and LAO Relationships

NOTE: The E.T. will consult with appropriate individuals at LAO and involved in other organizations while considering:

#### Relationship to LAO

- represents Kinna-aweya Legal Clinic appropriately
- co-operates in all reporting systems as required
- acts as a resource person
- co-operates in information sharing and planning

#### Northern Region Clinics' Association

- represents the interests of the Kinna-aweya Legal Clinic
- assists other clinics in their development
- advocates on behalf of North as appropriate

#### Inter-Clinic Groups

- network involvement
- Clinic Resource Office involvement
- Resource person for other regional associations

### EVALUATION TEAM SIGNATURES:

\_\_\_\_\_  
**BOARD MEMBER**

\_\_\_\_\_  
**STAFF MEMBER**

**Date Worksheet Completed:** \_\_\_\_\_

**Date Copy given to C.L.S.:** \_\_\_\_\_



**Kinna-aweya Legal Clinic**  
**Director of Administration**  
**Performance Review Worksheet**

**Name:**

**Job Title:** **Director of Administration**

**Length of Employment:**

**Period Covered by Review: From:** **To:**

**Reviewed conducted by:** **(Staff)**  
**(Board)**

The Director of Administration is responsible for the day-to-day operation of the clinic and is accountable on all matters to the Board of Directors. This responsibility extends to the administration of the office, personnel matters, the quality, type, and level of clinic services. As well, it includes liaison with other clinics and member agencies, etc.

**Section I**

The Evaluation Team will consult with senior staff and board members to evaluate the following:

**Administration**

- reports on activities and the budgetary status of the clinic to Board and LAO as required
- reviews daily correspondence (LAO and general) and channels or responds appropriately
- informs Board and staff on all essential matters of operation
- assists with the orientation of new Board/staff members
- schedules Board meetings when required
- prepares draft agenda for Board meetings and provides appropriate materials to the Board
- ensures Board minutes are accurately recorded and distributed
- ensures Board policy and procedure manual is maintained and updated
- assists Board committees as required
- organizes and attends Annual General Meeting, Area Community Meetings and prepares related information packages and distributes

- attends staff meetings and follows up on staff concerns
- maintains and reviews personnel policies and procedures regularly and revises, updates or adds policies as required
- supervises financial management and budgeting on a day-to-day basis
- participates in the budgeting and planning process
- reviews and responds appropriately to all complaints received and informs appropriate persons (Board, staff, LAO)
- attends meetings with Legal Aid Ontario as required

### **Financial Management:**

- ensures completion of all financial reports for the proper financial management of the clinic
- ensures clinic bills are paid promptly
- ensures accurate records are kept of all payable and receivables for general/legal disbursement accounts
- ensures prompt reimbursement to staff for expenses incurred on clinic business
- approves expenditures
- ensures reimbursement by staff for personal use of clinic facilities, i.e. personal mileage, telephone, postage, photocopy, etc. where appropriate
- ensures that all travel expenses to be reimbursed from other sources are requested and received
- supervises Bookkeeper
- prepares preliminary and annual funding application budget
- maintains personnel files for all clinic employees
- ensures semi-monthly payroll for all employees is calculated correctly and proper deductions are made and remitted as required
- ensures annual T4 records are prepared accurately
- maintains clinic bank accounts, deposits and signatory requirements
- maintains petty cash fund
- ensures adherence to the clinic's funding conditions including reporting requirements and attends meetings of Legal Aid Ontario staff and any other meetings as directed

### **Personnel Management:**

- implements, administers and monitors all Board personnel policies
- reviews monthly staff time sheets
- participates in hiring of clinic staff and termination process
- informs Board of employee performance and any discipline to deal with employee performance problems as appropriate
- assists Board in conducting annual performance evaluations of all staff
- prepares support staff evaluations
- monitors accumulation of overtime by staff

**General Comments:**

- exercises good judgment
- assumes responsibility
- meets deadlines
- able to work alone/as a team
- reliability/skills application generally
- able to communicate openly/honestly

**Section II****Relationship with Support Staff:**

- clear instructions, deadlines
- courteous
- input from support staff should be obtained and summarized by Evaluation Team

**Relationship with Legal Staff:**

- able to work as a team
- consults with staff through meetings or individually as appropriate
- keeps staff informed of administrative matters

**Section III****Commitment/Attitude to Job:****Personal Development:**

- goals/objectives are set and appropriate action taken

**Time Management:**

- appropriate techniques are identified and used to allow for efficient, effective use of time

**Reliability:**

- basically can be depended upon to handle work, follow through, achieve results within an appropriate time frame

## **Section IV**

### **Relationship with Board:**

In this section, the Evaluation Team will consult with senior Board members and the chair to evaluate the Director of Administration and consider the following:

### **Reports to the Board at regular meetings:**

- attends Board meetings
- thorough reporting
- clear and understandable summaries
- well prepared
- open/honest
- provides Board with necessary material
- takes initiative when appropriate and consults with Board when appropriate

### **Implementation of Board policies:**

- reporting back on implementation
- follows up on directions of Board
- identifies for Board areas in which policy decisions are required

### **Assists Board Committees as required:**

- i.e. hiring committees, salary committee

## **Section V**

### **Clinic Services:**

Evaluation Team will consult with Board members, and any interested parties, and the Co-ordinator of Legal Services with respect to the following:

- consults with Board of Directors and Co-ordinator of Legal Services to establish priorities among Clinic services based on client needs, available funds and human resources
- liaises with other organizations and the general public as directed
- represents legal clinic appropriately in the community
- performs public relation duties as required

## **Section VI**

### **Relationship with Co-ordinator of Legal Services:**

NOTE: The Evaluation Team shall consult with the Co-ordinator of Legal Services in considering the following:

#### **Keeps the Co-ordinator of Legal Services informed of all matters affecting the legal services of the clinic.**

- consultation as required
- is available as required
- co-operates in information sharing and planning
- able to work as member of management team

## **Section VII**

### **Relationship with Clinic Services staff:**

NOTE: The Evaluation Team will consult with appropriate individuals at the Clinic Services office while considering the following:

- represents the Kinna-aweya Legal Clinic appropriately
- responds quickly to requests from LAO
- co-operates in all reporting systems as required

### **EVALUATION TEAM SIGNATURES:**

\_\_\_\_\_  
**BOARD MEMBER**

\_\_\_\_\_  
**STAFF MEMBER**

**Date Worksheet Completed:** \_\_\_\_\_

**Date Copy given to D.O.A.:** \_\_\_\_\_