

DNA-People's Legal Services, Inc.
Personnel Policies & Procedures Manual
Appendix D - Performance Evaluations
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PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Executive Director Performance Evaluation

Name of Executive Director: _____ Date of Evaluation: _____

Title of Evaluator: _____ (Please complete areas relevant to you)

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
 2 - Solid, more than adequate
 1 - Needs improvement (comments required)
 DK - Don't Know (Insufficient experience in this
 area to rate)

A. The (day-to-day) administration of DNA

_____ Understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Interacts well with major ethnic and language groups among DNA's client population

_____ Effective management and leadership skills

_____ Delegates work appropriately

_____ Listens to input from staff (invited or not) about how DNA could operate more effectively

_____ Is available to the public on work days, or appropriately designates someone to do this in his/her absence.

_____ Is available to DNA staff on work days, or appropriately designates someone to be available to DNA staff in his/her absence.

_____ Responds in a timely manner to requests and needs of staff, funders, and outside entities.

_____ Acts decisively and independently to carry out DNA policies, and to implement ideas for DNA to be more effective;

_____ Effectively plans and coordinates client services

_____ Performs all duties required by DNA's by-laws or other organizational documents

Comments: _____

B. Hiring, training, supervision and discharge of staff

- _____ Maintains effective relations with DNA's staff and participating outside attorneys
- _____ Encourages professional development and enhancement of leadership skills in DNA's staff
- _____ Effectively recruits and hires litigation and support staff
- _____ Effectively oversees the coaching, motivation and discipline of litigation and support staff, as appropriate
- _____ Effectively coaches, motivates and disciplines executive staff
- _____ Assists the Board to develop personnel policies and informs the Board of the need to update policies
- _____ Ensures compliance with personnel policies
- _____ Effectively supervises the Director of Litigation [provided that an Executive Director who is not admitted to a bar will not manage or direct legal work for a jurisdiction in which he/she is not licensed. This does not preclude a Director licensed by a tribal bar association from client representation or advice in tribal court matters, nor does it preclude fiscal approval in litigation matters]
- _____ Consults with and assists advocates and lawyers on legal matters as appropriate or requested
- _____ Effectively supervises the Director of Administration
- _____ Ensures that staff with supervisory responsibilities are carrying out those responsibilities properly
- _____ Consults with the Executive Staff to plan and conduct staff training
- _____ Ensure that staff meetings are held as needed

Comments: _____

C. Assisting the Board

- _____ Works effectively with the Board
- _____ Provides assistance to the Board and its committees in the scheduling, notification, and conduct of meetings
- _____ Informs the Board on a timely basis of issues requiring Board action

_____ Ensures that the Board and its committees receive information necessary to make informed recommendations and decisions

_____ Adopts policies not inconsistent with the policies established by the Board or its Executive Committee in DNA's Personnel Policies & Procedures Manual. [A copy of all policies adopted by the Executive Director must be sent to all DNA personnel and the Board's Executive Committee at least 10 days before the policy's effective date. The Board's Executive Committee may, at any duly called meeting, modify or revoke any policy adopted by the Executive Director.]

_____ Performs other duties assigned by the Board, such as: _____

Comments: _____

D. Managing program finances

_____ Prepares draft annual budgets and monitors approved budgets

_____ Ensures that the program expenses comply with the approved budget, LSC and other grantors' guidelines, and Board directives

_____ Ensures that the Board receives quarterly financial reports

_____ Ensures that the program is audited by an independent auditor annually

_____ Informs the Board of financial problems as they arise and assists the Board on developing responses

_____ Makes final decisions on major purchases and expenditures of litigation and travel funds over \$250

_____ Appropriately signs all leases and contracts

_____ Effectively supervises Executive Staff with financial responsibilities

_____ Effectively supervises Development Director [ensuring prompt and professional preparation of funding proposals], and assists in identifying new funding opportunities and the raises additional resources to support DNA's operations

Comments: _____

E. Directing and monitoring provision of program services

- _____ Ensures the integrity and accountability of DNA's programs and operations
- _____ Develops and maintains internal reporting systems and gives quarterly reports to the Board and staff
- _____ Works with Board and staff to distribute information and develop policies, plans and priorities concerning program services
- _____ Monitors services to assure that policies are properly implemented
- _____ Conducts periodic visits to monitor field staff
- _____ Appropriately procures, maintains and oversees DNA's physical facilities and their safety
- _____ Effectively supervises Information Technology Staff and projects
- _____ Effectively supervises Purchasing Staff and projects

Comments: _____

F. Represents DNA

- _____ Commands the respect of members of the bar, the judiciary, and others in positions of authority in the community
- _____ Receives complaints and ensures appropriate and timely response
- _____ Meets and communicates with tribal governments and the client community
- _____ Coordinates with the Legal Director to ensure appropriate representation of DNA on or before bar associations and other organizations
- _____ Attends Project Director's Meetings

_____ Effectively manages DNA's relationship with LSC, including timely submission of all required material

Comments: _____

G. Areas of Improvement

List areas that DNA would benefit from the Executive Director improvement. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

H. Training Needs

Identify training needs of the Executive Director, and discuss a plan to meet those training needs:

H. Recommendation

It is / is not (circle one) recommended that the Executive Director stay on as the leader of DNA-People's Legal Services.

A salary increase of _____ is recommended, which will bring the Executive Director's salary to \$_____ per year.

Evaluation completed after the input from representatives of the following roles at DNA:

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Administrative Director Performance Evaluation

Name of Administrative Director: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Administrative Director Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Effectively provides legal counsel to DNA regarding compliance with requirements of LSC and other funders

_____ Trains all DNA personnel on regulations and requirements under DNA's grants from LSC and other grantors, including all of LSC's regulations, eligibility, case closing, timekeeping and related requirements

_____ Effectively provides legal counsel to DNA regarding all aspects of DNA's operations

_____ Drafts DNA policies as required

_____ Maintains DNA's LSC Compliance Manual, and advises Managing Attorneys and Project Directors of changes in compliance requirements

_____ Assists DNA's Development personnel and the Executive Director to choose and prepare grant proposals to LSC and other potential funders

_____ Effectively oversees the administration of grants received, specifically:

_____ Tracks reporting requirements for each of DNA's grants

_____ Works with Project Directors, where applicable, to ensure progress reporting is done on time

- _____ Where there is no Project Director, gather all required information and complete all quarterly, annual, and end-of-grant period progress reports for all DNA grants
- _____ Review litigator timeslips in Kemp's/Prime, and work with Fiscal Manager to timely complete monthly, quarterly, and annual financial reports to grantors
- _____ Work with Fiscal Manager to track spending under all DNA grants, makes budget adjustment requests to grantors where appropriate
- _____ Acts as the main DNA contact for LSC and other funders, coordinates site visits by LSC and other grantors
- _____ Assists in completion of DNA's annual audit
- _____ Works with the Director of Development and Project Directors to assure the integration of proposed projects into the overall mission and structure of DNA
- _____ Reviews accuracy and appropriateness of Community Legal Education materials on law and law-related issues
- _____ Regularly reviews case management data for accuracy, integrity, and appropriate grant coding in Kemp's/Prime or other designated database
- _____ Attends database training, and trains DNA staff on using all aspects of the database.
- _____ Works with DNA's technical staff to enhance the database to DNA's needs
- _____ Coordinates with the Fiscal Manager to identify and propose solutions to financial issues to the Executive Director
- _____ Effectively supervises, coaches, motivates, and disciplines the Purchasing Manager
- _____ Effectively supervises, coaches, motivates, and disciplines the Community Education Coordinator
- _____ Effectively supervises, coaches, motivates, and disciplines the Fiscal Manager
- _____ Effectively supervises, coaches, motivates, and disciplines the Manager of Information Systems
- _____ Acts as Executive Director in the absence of the Executive Director.

_____ Represents the Executive Director at meetings when designated by the Executive Director.

_____ Provides quarterly reports to DNA's Board of Directors, and attends board meetings

_____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Administrative Director improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Administrative Director, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Administrative Director stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Administrative Director's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Director of Litigation Performance Evaluation

Name of Litigation Director: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Director of Litigation Duties

- _____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area
- _____ Effectively recruits litigation staff
- _____ Effectively interviews staff applicants, and makes timely hiring recommendations to Executive Director
- _____ Effectively supervises, coaches, motivates, and disciplines litigation staff
- _____ Completes performance evaluation for Managing Attorneys in a timely manner; consults with Managing Attorneys regarding litigators' performance evaluations
- _____ Effectively trains litigation staff
- _____ Supervises work of litigators in field offices, including docket control measures, case management, and case review
- _____ In consultation with Administrative Director, ensures that litigators are complying with LSC requirements
- _____ Appropriately approves use of litigation funds by litigators
- _____ Oversees library needs with the Library Technician
- _____ Effectively supervises, coaches, motivates and disciplines the Library Technician
- _____ Determines training needs for litigators

- _____ Timely and appropriate approval of litigator training requests, in compliance with DNA's training policies
- _____ Ensures that litigators meet their CLE requirements
- _____ Monitors litigator's training expenses to ensure their compliance with DNA's budget
- _____ Helps develop and write fundraising proposals
- _____ Works with Project Director(s) to assure that the project's legal work is integrated into the overall mission of DNA
- _____ Acts as Executive Director in the absence of the Administrative Director and Executive Director
- _____ Represents the Executive Director at meetings when designated by the Executive Director.
- _____ Provides quarterly reports to DNA's Board of Directors, and attends board meetings
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Director of Litigation improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Director of Litigation, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Director of Litigation stay on in that position.

A salary increase of _____ is recommended, which will bring the Director of Litigation's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Executive Secretary Performance Evaluation

Name of Executive Secretary: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Executive Secretary Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Handles all personnel correspondence from all offices, including preparation of Personnel Action Forms and other necessary forms

_____ Coordinates Central Office secretarial activities

_____ Administers secretarial exams

_____ Compiles, prepares, and mails advance materials for the Board of Directors and Board Committee meetings

_____ Attends Board and Board Committee meetings, and keeps minutes of those meetings

_____ Assists the Executive Director and Administrative Director in complying with LSC and other funding source requirements and other administrative matters

_____ Is willing to work some weekends and overtime

_____ Proficient in typing and proofreading

_____ Drafts letters, reports and other documents for the Executive Director and Administrative Director

_____ Proficient with DNA's computer systems, specifically:

_____ Proficient in using Microsoft Word

_____ Proficient in using Microsoft Outlook, including using office-wide calendars, tasks, and permanently deleting old e-mails/sent items

_____ Proficient in using Microsoft Excel

_____ Proficient in creating, editing and printing simple PowerPoint presentations

_____ Proficient in filing correspondence, reports, and other documents for the Executive Director and Director of Administration

_____ Proficient in using and maintaining copiers, shredders, telephone systems, typewriters and other office equipment; takes initiative to call for repairs when equipment is not fixable

_____ Makes travel arrangements for Executive Director and Administrative Director

_____ Completes travel expense reports for Executive Director and Administrative Director

_____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Executive Secretary improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Executive Secretary, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Executive Secretary stay on in that position.

A salary increase of _____ is recommended, which will bring the Executive Secretary's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Administrative Assistant Performance Evaluation

Name of Administrative Assistant: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Administrative Assistant Duties

- _____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area
- _____ Effectively provides assistance to the executive staff and branch offices in recruitment, evaluation, and selection of candidates for positions.
- _____ Proficiently handles all employee records in a timely manner
- _____ Effectively recruits and interviews candidates for janitorial and other support staff positions for the Central Office, and recommends selection to the Executive Director.
- _____ Appropriately coordinates job advertisement with appropriate advertising publishers.
- _____ Assists in evaluation of non-professional staff
- _____ Coordinates training program with executive staff and Managing Attorneys, and maintains employee training plans and files
- _____ Assists supervisors in developing performance reviews and ensures that employees are evaluated annually
- _____ Assists in securing equipment, services, and supplies needed by the executive staff
- _____ Reviews and approves invoices, travel claims and other requests for reimbursement, to ensure their accuracy and proper authorization

- _____ Reviews all invoices and bills, determines whether billing is proper and appropriate before authorizing payment
- _____ Assists with LSC grant renewal reporting and other statistical reports as required
- _____ Assists in the administration of DNA's benefits programs, and communicates benefits information to employees
- _____ Maintains and safely stores Petty Cash Account box for administrative staff
- _____ Reimburses executive staff for purchases of less than \$25 in a timely manner
- _____ Assures that receipts or invoices are obtained for all Petty Cash purchases and reports purchases to Accounting with a request to replenish account
- _____ Proficient with DNA's computer systems, specifically:
 - _____ Proficient in using Microsoft Word
 - _____ Proficient in using Microsoft Outlook, including using office-wide calendars, tasks, and permanently deleting old e-mails/sent items
 - _____ Proficient in using Microsoft Excel
 - _____ Proficient in creating, editing and printing simple PowerPoint presentations
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Administrative Assistant improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Administrative Assistant, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Administrative Assistant stay on in that position.

A salary increase of _____ is recommended, which will bring the Administrative Assistant's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.
Director of Development Performance Evaluation

Name of Development Director: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Director of Development Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Proficient with computer systems, specifically:

_____ Proficient in using Kemp's/Prime database

_____ Proficient in using Microsoft Word

_____ Proficient in using Microsoft Outlook, including using office-wide calendars, tasks, and permanently deleting old e-mails/sent items

_____ Proficient in using Microsoft Excel

_____ Proficient in using fund-raising software

_____ Proficient in conducting grant source, foundation, and prospect research over the internet

_____ Effectively identifies program needs, then identifies and pursues new funding sources to help fulfill those needs

_____ Has a plan for educating the public and the legal community about DNA's

services, mission and accomplishments

- _____ Effectively communicates and disseminates information about DNA's services, mission and accomplishments to both legal professionals and our client community
- _____ In cooperation with the Community Education Coordinator, plans, produces, and distributes development publications and materials, including newsletters, annual reports, fundraising solicitations and related materials
- _____ Effectively manages and expands DNA's fundraising activities to include giving through direct mail, electronic mail, telephone and internet campaigns.
- _____ Appropriately organizes fundraising events
- _____ Effectively plans, organizes, and coordinates corporate fundraising efforts
- _____ Effectively plans, organizes, and coordinates foundation fundraising efforts
- _____ Effectively plans, organizes, and coordinates government fundraising efforts
- _____ Researches new income sources
- _____ Effectively manages the preparation of grant proposals
- _____ Notifies office and project staff of grant opportunities
- _____ Works with appropriate project directors or other staff to develop and track grant proposals
- _____ Manages donor-related correspondence for the Executive Director, Board of Directors, and client advisory committees, including writing appeal letters and supervising donor acknowledgment, recognition and stewardship systems
- _____ Works with Executive Director to develop short- and long-term fundraising strategies
- _____ Keeps informed the Executive Director and DNA staff about development activities
- _____ Monitors development expenses to ensure their compliance with DNA's budget
- _____ Recruits, hires, trains, evaluates and supervises development staff
- _____ Effectively supervises, coaches, motivates, and disciplines development staff

_____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence

_____ Effectively works with other staff members in the office

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Director of Development improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Director of Development, and discuss a plan to meet those training needs: _____

D. Recommendation

It is / is not (circle one) recommended that the Director of Development stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Director of Development's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Development Assistant Performance Evaluation

Name of Development Assistant: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines.

_____ Organizational skills

_____ Securing financial support for DNA's grant funded program activities by Preparing and submitting grant proposals to existing and new grant funders.

_____ Works collaboratively with DNA staff to create and submit grant Proposals.

_____ Distribute information about grants and funders' requirements to DNA Staff, to facilitate compliance with funders' requirements.

_____ Manage all grant proposal development from project concept to Proposal submission.

_____ Maintain grant files and database of grant information, such as funders' Contact information, grant award letters and/or contracts, correspondence And proposals and budgets and award amounts.

_____ Communicate relevant grant funding opportunities to appropriate DNA staff.

_____ Collaboratively develop project ideas with interested staff; prepare Summaries of project ideas that can be developed into grant

Proposals when appropriate.

_____ Maintain calendar of grant RFPs and submission deadlines.

_____ Identify new grant funding opportunities; distribute information to DNA staff.

_____ Establish program goals in collaboration with Director of Development.

_____ Prepare regular status and progress reports.

_____ Assist with development and fundraising activities, including:

_____ Database maintenance ó data entry, creating and running queries and Reports.

_____ Annual fund ó planning; reporting; establishing benchmarks; preparing Correspondence and materials; identification, cultivation, solicitation and stewardship activities.

_____ Communications ó internal and external.

_____ Marketing ó develop, distribute and update materials, including Newsletter.

_____ Volunteer recruitment, management and stewardship.

_____ Oversee additional development program components as appropriate, Depending on professional interests and demonstrated skills and abilities.

_____ Performs other duties assigned.

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Development Assistant improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Development Assistant, and discuss a plan to meet those training needs: _____

F. Recommendation

It is / is not (circle one) recommended that the Development Assistant stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Development Assistant's salary to \$ _____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Fiscal Manager Performance Evaluation

Name of Fiscal Manager: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Fiscal Manager Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Proficient with computer systems, specifically:

_____ Proficient in using P_____ Accounting software

_____ Maintains DNA's financial data and grant reports on the computer

_____ Proficient in using Microsoft Word

_____ Proficient in using Microsoft Outlook, including using office-wide calendars, tasks, and permanently deleting old e-mails/sent items

_____ Proficient in using Microsoft Excel

_____ Effectively identifies program needs, and proposes solutions to these needs to the Executive Director

_____ Performs accounting activities, including the verification, recording, audit, analysis and reporting of financial transactions

_____ Performs accounting activities relative to costs, billings, payment of vendor accounts and reconciliation of vendor invoices, budgets, and funding

- _____ Prepares or supervises the preparation of periodic financial reports and forecasts for DNA and its programs, and distributes these to staff
- _____ Prepares quarterly reports for DNA's Board of Directors and its Budget & Audit Committee
- _____ Attends DNA Board of Directors and the Budget & Audit Committee meetings
- _____ Assists outside auditors in their review of financial conditions and transactions
- _____ Knows, and complies with federal accounting procedures
- _____ Trains and supervises the Assistant Fiscal Managers with responsibilities concerning the Attorney Trust, General, Petty Cash, and Payroll accounts
- _____ Recruits, hires, trains, evaluates and supervises accounting staff
- _____ Effectively supervises, coaches, motivates, and disciplines accounting staff
- _____ Ensures accounting staff's adherence to DNA's Accounting Manual
- _____ Supervises the training of field office secretaries in the maintenance of the Attorney Trust and Petty Cash accounts
- _____ Consults with the Executive Director and other executive staff regarding budgetary matters
- _____ Periodically reviews DNA's Accounting Manual, and proposes changes to it
- _____ Effectively works with other staff members throughout DNA
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____
- _____
- _____
- _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Fiscal Manager improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Fiscal Manager, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Fiscal Manager stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Fiscal Manager's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Assistant Fiscal Manager Performance Evaluation

Name of Asst Fiscal Manager: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Assistant Fiscal Manager Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Proficient with computer systems, specifically:

_____ Proficient in using P_____ Accounting software

_____ Maintains DNA's financial data and grant reports on the computer

_____ Proficient in using Microsoft Word

_____ Proficient in using Microsoft Outlook, including using office-wide calendars, tasks, and permanently deleting old e-mails/sent items

_____ Proficient in using Microsoft Excel

_____ Effectively identifies program needs, and proposes solutions to these needs to the Fiscal Manager

_____ Knows, and complies with federal accounting procedures

_____ Manages the Attorney Trust Account, specifically:

_____ Receives transmittals from field offices and deposits money

transmitted

- _____ Prepares checks and transmittals as requested by field offices
- _____ Prepares monthly disbursements and receipts journals
- _____ Reconciles bank statement of attorney trust accounts
- _____ Keeps current the field office's Attorney Trust Accounts
- _____ Assists and trains field office Trust Account clerks as requested
- _____ Prepares and compiles time sheets
- _____ Prepares payroll and accounts payable checks
- _____ Assists in timely preparation of monthly, quarterly, and annual accounting reports
- _____ Keeps attendance records on all employees
- _____ Effectively works with other staff members throughout DNA
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____
- _____
- _____
- _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Assistant Fiscal Manager improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the

improvement: _____

C. Training Needs

Identify training needs of the Assistant Fiscal Manager, and discuss a plan to meet those training needs: _____

D. Recommendation

It is / is not (circle one) recommended that the Assistant Fiscal Manager stay on in that position.

A salary increase of _____ is recommended, which will bring the Assistant Fiscal Manager's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Accounting Clerk Performance Evaluation

Name of Accounting Clerk: _____

Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Accounting Clerk Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Provides high quality legal services to DNA clients; specifically:

_____ Reports to the immediate supervisor of her/his unit.

_____ Collects timesheets.

_____ Assist with processing payroll.

_____ Update attendance records.

_____ Process Accounts payable.

_____ Balance travel expenses.

_____ Balance payroll quarterly reports.

_____ Balance employee statistics.

_____ Process tax payments.

_____ Distribute personal telephone expense to staff.

_____ Make bank deposits.

_____ General secretarial work.

_____ Prepare files for upcoming fiscal years.

_____ Filing and storing of files.

_____ Is familiar and complies with DNA's policies and procedures.

_____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Accounting Clerk improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Accounting Clerk, and discuss a plan to meet those training needs:

F. Recommendation

It is / is not (circle one) recommended that the Accounting Clerk stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Accounting Clerk's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.

Manager of Information Technology Performance Evaluation

Name of IT Manager: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. IT Manager Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Manages DNA's technology infrastructure, including computers and telecommunications

_____ Administers DNA's local-area and wide-area networks

_____ Administers DNA's case management database

_____ Trains and supervises the Information Systems Technician(s)

_____ Recruits, hires, trains, evaluates and supervises IT staff

_____ Effectively supervises, coaches, motivates, and disciplines IT staff

_____ Ensures all DNA staff's adherence to DNA's IT Policies

_____ Periodically reviews DNA's IT Policies, and proposes changes to it

_____ On an ongoing basis, assesses technology needs in all DNA offices

_____ Evaluates software, hardware and network installations to determine the extent to which computer resources meet DNA's current and future needs

- _____ Develops and implements DNA's IT plan, soliciting staff input at all states of plan formation
- _____ Ensures that DNA's staff receives appropriate training in computer hardware, operating systems, and applications
- _____ Develops a comprehensive training program, soliciting staff's input on their training needs
- _____ Ensures that DNA's data is secure and that backup of all data is performed regularly
- _____ Provides technical support for program, administrative and financial activities in central and field offices
- _____ Maintains a system whereby computer problems in the field offices are responded to and resolved promptly
- _____ Willingness to travel on a regular basis to all DNA offices
- _____ Is working toward a Microsoft Certified Systems Engineer certificate or other industry-recognized certification
- _____ Monitors technology as it relates to law firm management, identifying products and applications that will enhance productivity and facilitate program and office administration
- _____ Identifies, maintains, and enhances applications to meet the needs of legal, administrative, and development staff, including word processing, scheduling, e-mail and messaging, internet access, legal research, document production, case management, timekeeping, accounting, fundraising, and security
- _____ Works with Development Director to identify possible funding sources for DNA technology upgrades, and assists in developing grant proposals
- _____ Works with Development Director to identify possible funding sources for other uses of technology that directly benefit DNA's clients, and assists in developing grant proposals
- _____ Tracks IT expenses, to ensure that they are adhering to DNA's IT budgets in various grants
- _____ Effectively works with other staff members throughout DNA
- _____ Is available to the public and DNA staff on work days, or appropriately designates

_____ someone to do this in his/her absence
Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the IT Manager improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the IT Manager, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the IT Manager stay on in that position.

A salary increase of _____ is recommended, which will bring the IT Manager's salary to \$ _____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Information Systems Technician Performance Evaluation

Name of IT Technician: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Information Systems Technician Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Maintains, repairs and keeps up DNA's PCs and network systems

_____ Ensures that users and offices are following standard procedures development the IT Department, including using IT Department forms to report computer problems, backup of systems, antivirus protection and general care of computers

_____ Participates in regular meetings with IT Manager to discuss scheduling and maintenance of project deadlines

_____ Assists IT Manager to manage DNA's technology by identifying appropriate technologies for PC, network, and application upgrades

_____ Provides computer support and training for DNA staff on new and updated computer hardware, operating systems, and applications

_____ Maintains a database of all DNA PCs, including the identification number and user, a description of the hardware, software and repair history of each PC

_____ Maintains shop workbench in good working order

_____ Establishes and maintains an inventory for computer repairs

- _____ Coordinates with the Manager of Information Systems and Purchasing Manager regarding the purchase, tagging, and delivery of new computer equipment
- _____ Maintains a system by which new equipment is recorded by ID number, user, office and machine, in order to facilitate the maintenance of machines and/or the return of defective equipment
- _____ Willingness to travel on a regular basis to all DNA offices
- _____ Is working toward an A+ Certification or other industry-recognized certification
- _____ Effectively works with other staff members throughout DNA
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Information Systems Technician improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Information Systems Technician, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Information Systems Technician stay on in that position.

A salary increase of _____ is recommended, which will bring the Information Systems Technician's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.

Help Desk/Content Coordinator

Name of Help Desk Content Coordinator: _____

Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)

2 - Solid, more than adequate

1 - Needs improvement (*comments required*)

DK - Don't Know (Insufficient experience in this area to rate)

A. Primary Responsibility – Help Desk

_____ Help Desk Software ó Spiceworks

_____ Full inventory of CPU's to determine if upgrades are needed for workstations Or servers.

_____ Full inventory of printers to determine if replacements or service is needed.

_____ Software ó Full inventory of software used in the enterprise to determine if Upgrades are needed and for compliance

_____ NELL

_____ NativeLegalNet

_____ Recording in English and Navajo

_____ Hardware ó printers, CPU's etc, with Mike

_____ Reprogramming of Auto-Attendant ó Update

_____ Rightfax ó Support

_____ Unified Messaging ó Support

_____ Instant Messaging ó Support

_____ Long Distance reporting. Mike to Help Desk

_____ Window Rock phone system ó Propaganda on hold. Mike to Help Desk
Same as Window Rock
Duplicate all of the NELL call processors to the Flagstaff phone system

_____ NELL Advertising campaign (IT staff and community education)

_____ Effectively works with other staff members throughout DNA

_____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Help Desk/Content Coordinator improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Help Desk/Content Coordinator, and discuss a plan to meet those training needs: _____

D. Recommendation

It is / is not (circle one) recommended that the Help Desk/Content Coordinator stay on in that position.

A salary increase of _____ is recommended, which will bring the Help Desk/Content Coordinator's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Library Technician Performance Evaluation

Name of Library Technician: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Library Technician Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Receives requests and places orders for library books and materials

_____ Maintains logs regarding requests for books, noting whether the requests have been filled, denied, or are on hold

_____ keeps the requesting party informed about the status of requests

_____ Checking and responding to e-mail on a daily basis

_____ Issues receiving reports for purchased materials

_____ Arranges timely payment by Accounting when receipts for purchase order are received

_____ Maintains subscriptions to periodicals

_____ Supervises orderly use of the Window Rock library, shelves materials and updates in Window Rock

_____ Responds in a timely manner to staff requests for copies of materials

_____ Monitors library purchases to ensure compliance with the budget

- _____ Works with all Managing Attorneys/Advocates and Office Managers to keep field office libraries current
- _____ Trains Office Managers on how to properly maintain field office libraries
- _____ Maintains an inventory of library materials in all offices
- _____ Works with Westlaw, Lexis and/or other on-line legal research providers to ensure that DNA's service is cost-effective, and serves the needs of DNA Litigators (particularly tribal law materials)
- _____ Performs on-line and manual legal research for DNA Litigators, ensuring that all citations are Shepherdized
- _____ Writes coherent research memorandums with research results for Litigators
- _____ Works with tribal law material providers to stay up-to-date with available materials, so that when requests for books and other materials are made, s/he knows where the materials are available (hard-copy or on-line) and how much those cost, so that timely decisions can be made
- _____ Attends regular DNA Administration meetings
- _____ Meets regularly with Administrative Director to manage workload
- _____ Effectively works with other staff members throughout DNA
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations
- _____ Keeps accurate records of time spent on each matter on which s/he works in Kemp's/Prime database
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Library Technician improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Library Technician, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Library Technician stay on in that position.

A salary increase of _____ is recommended, which will bring the Library Technician's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Purchasing Manager Performance Evaluation

Name of Purchasing Manager: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Purchasing Manager Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Manages multiple projects and meets deadlines

_____ Organizational skills

_____ Receives requests and places orders for supplies not available through Caddo Solutions, and for equipment

_____ Obtains bids for bulk purchases and purchases of capital items and forwards the bids to the Director of Administration

_____ Maintains logs regarding requests for extraordinary supplies and equipment, noting whether the requests have been filled, denied, or are on hold

_____ keeps the requesting party informed about the status of requests

_____ Issues receiving reports for purchased materials

_____ Arranges payment by Accounting when receipts for purchase order are received

_____ Maintains an inventory of supplies and equipment, and initiates orders for additional supplies

_____ Maintains a list of all equipment and performs an annual inventory of DNA equipment for every office

_____ Responsible for equipment rental

- _____ Monitors supply and equipment purchases to ensure compliance with the budget
- _____ Operates and replenishes the Window Rock postage scale and meter, prepares outgoing mail for mailing, and picks up and distributes incoming mail
- _____ Monitors the physical plant of all DNA properties and arranges for any necessary repairs
- _____ Works with Administrative Director to assess the needs of DNA's physical space and ensure their efficient operation
- _____ Effectively works with other staff members throughout DNA
- _____ Is available to the public and DNA staff on work days, or appropriately designates someone to do this in his/her absence
- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____
- _____
- _____
- _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Purchasing Manager improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Purchasing Manager, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Purchasing Manager stay on in that position.

A salary increase of _____ is recommended, which will bring the Purchasing Manager's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.

Community Legal Education Coordinator - Performance Evaluation

Name of Comm. Legal Educ. Coord: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Community Legal Education Coordinator Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Provides high quality legal services to DNA clients; specifically:

_____ Reports to the immediate supervisor of her/his unit.

_____ Recruitment.

_____ Hiring, training, evaluation, promotion and supervision of Administrative Assistant-Community Education.

_____ Plans, produces and distributes preventive law materials; With the assistant of DNA's legal staff and following Review by the Director of Administration. Preventive Law materials include DNA newsletter, brochures, posters, Video and audiotapes, web sites, and newspaper Articles.

_____ Coordinates community legal education activities, Addressing the need for program outreach. Conducts Presentations, workshops, and trainings for chapters, Schools, service providers and other community Organizations. Promotes DNA services and conducts Community outreach and education by radio, television, Internet, newspaper and other media.

_____ Responsible for media relations and program promotion, Issuing press releases and other informational Materials with Executive Director's approval.

_____ Help Managing Attorneys and Project Directors to Organize their office's community legal education Activities, providing support, materials and other Assistance.

_____ Working with the Director of Development, produces And distributes DNA public relations and fundraising Materials.

_____ Serves as the liaison between DNA and the program's Agency representatives and advisory committees. Provides training and conducts presentations for Representatives and committee members. Assists the allocation of resources by surveying client community to determine actual needs.

_____ Keeps the Executive Director and DAN staff informed of Community Legal Education activities.

_____ Monitors Community Legal Education expenses to Ensure their compliance with DNA's budget and policies.

_____ Performs other duties as assigned.

_____ Is familiar and complies with DNA's policies and procedures.

_____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Community Legal Education Coordinator improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Community Legal Education Coordinator, and discuss a plan to meet those training needs: _____

D. Recommendation

It is / is not (circle one) recommended that the Community Legal Education Coordinator stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Community Legal Education Coordinator's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.

Community Legal Education Administrative Assistant - Performance Evaluation

Name of Community Legal Education Administrative Assistant: _____

Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Community Legal Education Administrative Assistant Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Provides high quality legal services to DNA clients; specifically:

_____ Reports to the immediate supervisor of her/his unit.

_____ Develops content for DNA's touch-screen computer kiosks.

_____ Assist in designing and publishing of posters and brochures for DNA and its projects.

_____ Assists in community outreach to and education for DNA's client community in English and/or Navajo or Hopi.

_____ Typing, editing and filing correspondence, reports and memoranda.

_____ Is familiar and complies with DNA's policies and procedures.

_____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Community Legal Education Administrative Assistant improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Community Legal Education Administrative Assistant, and discuss a plan to meet those training needs: _____

D. Recommendation

It is / is not (circle one) recommended that the Community Legal Education Administrative Assistant stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Community Legal Education Administrative Assistant's salary to \$ _____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.

Clerk Performance Evaluation

Name of Clerk: _____

Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Clerk Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Provides high quality legal services to DNA clients; specifically:

_____ Reports to the immediate supervisor of her/his unit.

_____ Responsibility for filing of all documents and paperwork and file maintenance.

_____ Covering the typing and word processing requests of the members of the unit the clerk is assigned to.

_____ Answering telephones and taking messages as needed.

_____ Other duties as assigned.

_____ Is familiar and complies with DNA's policies and procedures.

_____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Clerk improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Clerk, and discuss a plan to meet those training needs: _____

F. Recommendation

It is / is not (circle one) recommended that the Clerk stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Clerk's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Managing Attorney/Advocate Performance Evaluation

Name of Managing Attorney/Advocate: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. The (day-to-day) management of the office

_____ Understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Effectively serves as liaison between the office and staff, other offices, and DNA administration

_____ Attends managing attorney/advocate meetings and reports back to branch office employees on matters discussed at the meetings.

_____ Elicits and listens to input from staff (invited or not) about DNA's policies and operations, and communicates staff comments to DNA administration.

_____ Knows, and ensures all office employees are familiar with DNA's policies and procedures.

_____ Knows, and ensures all office employees are familiar with the provisions of the LSC Act and LSC regulations

_____ Knows, and ensures all office employees are familiar with the provisions of other funding sources and their requirements.

_____ Adopts office policies not inconsistent with the Personnel Policies & Procedures manual or policies established by the Board, its committees, or by the Executive Director.

_____ When such office policies are adopted, provides a copy of it/them to all field office staff and the Administrative Director at least 10 days before the policy's effective date.

_____ Conducts effective GCA meetings

_____ Is available to the public on work days, or appropriately designates someone to do this in his/her absence.

_____ Is available to DNA staff on work days

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Hiring, training, supervision and discharge of staff

_____ Encourages professional development and enhancement of skills in field office staff

_____ Effectively interviews new staff applicants, and makes timely recommendations regarding new hiring to Executive Director

_____ Effectively oversees the coaching, motivation, and discipline of litigation and support staff

_____ Completes performance evaluations for all staff members in a timely manner

_____ Effectively delegates duties to the Office Manager.

_____ Implements and maintains docket control of attorneys and advocates, including regular review of case lists.

Comments: _____

C. Litigator Duties

- _____ Demonstrates a commitment to the ideals of legal services and the rights of the poor
- _____ Within 1 year after starting work, became admitted to the state bar in which they will be practicing
- _____ Provides high quality legal services to DNA clients; specifically:
 - _____ Understands and analyzes legal issues presented in a case
 - _____ Spots legal issues, even if client doesn't articulate them
 - _____ Writes letters which are useful and understandable to the client
 - _____ Effectively writes pleadings and briefs
 - _____ Verbally conveys complex legal issues to the client in an understandable way
 - _____ Makes effective and coherent arguments in court
 - _____ Makes appropriate objections in court
 - _____ Appropriately preserves issues for appeal
 - _____ Negotiates appropriate settlements
 - _____ Respects clients' decisions
 - _____ Maintains a professional manner with adverse parties/counsel
 - _____ Maintains and appropriate caseload
 - _____ Is familiar with relevant jurisdictions' Statutes of Limitations
- _____ Exercises independent judgment in handling cases within bounds of his/her ethical responsibilities
- _____ Is familiar, and complies with the provisions of the LSC Act and LSC regulations, specifically:
 - _____ Does not handle cases (s)he knows are prohibited by LSC (such as abortion, assisted suicide, fee-generating cases, cases outside of DNA's priorities, cases outside of DNA employment, evictions)

related to drug convictions etc).

_____ Keeps timely and accurate timeslips in Kemp's/Prime for each matter on which s(he) is working

_____ Keeps accurate records in Kemp's/Prime of activities and updates on cases and other matters

_____ Closes files in a timely manner

_____ Obtains Retainer Agreements from clients

_____ Obtains Statements of Facts from clients when (s)he represents the petitioner

_____ Ensures that client has verified they are a US Citizen, or are otherwise eligible aliens

_____ Reviewed client's income and asset information, and brings it to the Managing Attorneys' attention if (s)he knows it's incorrect

_____ Is familiar, and complies with the provisions of other funding sources

_____ Takes part in DNA trainings, and maintains required CLEs in her/his relevant bar

_____ Complies with case reviews by Litigation Director and/or other senior attorneys

_____ Complies with docket control policies

_____ Takes part in office intake

_____ Takes part in Do It Yourself Legal Clinics

_____ Effectively delegates work to support staff

_____ Takes direction and constructive criticism well

_____ Attends Chapter, Village, school board, community group and client advisory group meetings, and otherwise helps provide community legal education.

_____ Performs other duties assigned, such as: _____

Comments: _____

D. Areas of Improvement

List areas that DNA would benefit from the Managing Attorney/Advocate improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

E. Training Needs

Identify training needs of the Managing Attorney/Advocate, and discuss a plan to meet those training needs: _____

F. Recommendation

It is / is not (circle one) recommended that the Managing Attorney/Advocate stay on in that position.

A salary increase of _____ is recommended, which will bring the Managing Attorney/Advocate's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Project Director Performance Evaluation

Name of Project Director: _____ Date of Evaluation: _____

Name of Project: _____ Funding Sources: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Project Director Duties

- _____ Demonstrates a commitment to the ideals of legal services and the Rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area.
- _____ Effectively heads a project that is financially self-sustaining
- _____ Assists to identify potential grant funding, and assists in writing grant proposals, in coordination with the Director of Development
- _____ Creates the mission, goals, and objectives for the project each year
- _____ Plans, directs, and coordinates activities of the project to ensure that the goals and objectives are accomplished within prescribed time frames and funding parameters
- _____ Reviews project proposals or plans to determine time frame, funding limitations, procedures for accomplishing project goals/objectives, staffing requirements, and allotment of available resources to various phases of the project
- _____ Arranges for recruitment, hiring, and assignment of project personnel, in consultation with the Executive Director, effectively interviews new staff applicants, and makes timely recommendations regarding new hiring to Executive Director
- _____ Effectively oversees the coaching, motivation, and discipline of litigation and support staff
- _____ Completes performance evaluations for all project staff members in a timely

manner

_____ Creates, maintains, and reviews the sound fiscal management of project budget and funds

_____ Ensures compliance with all funding source requirements, including reporting requirements

_____ Ensures compliance with DNA's policies and procedures by project personnel

_____ Prepares project reports for management, advisory boards, Board of Directors, client communities and others

_____ Coordinates project activities with activities of governmental and other community agencies

_____ Identifies and meets the training needs of project staff

_____ Attends management and litigation meetings

_____ Performs other duties as assigned, such as: _____

Comments: _____

Depending upon Project Director's other duties, this performance evaluation gets attached to that other performance evaluation. For example, if the Project Director is also a Litigator, this form is attached to the Litigator Performance Evaluation.

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Project Coordinator Performance Evaluation

Name of Project Coordinator: _____ Date of Evaluation: _____

Name of Project: _____ Funding Sources: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Project Coordinator Duties

- _____ Demonstrates a commitment to the ideals of legal services and the Rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area.
- _____ Effectively provides high quality legal services to DNA clients in a specialized area of law
- _____ Effectively provides client assistance in a specialized area
- _____ Effectively provides legal education to the community and other groups
- _____ Exercises independent judgment in handling cases within the bounds of ethical responsibilities
- _____ Drafts worthwhile goals or areas of specialization for the project
- _____ Successfully ensures that goals are met in a timely manner
- _____ Makes meaningful reports to the Executive Director and the Board on the progress of the project's goals
- _____ Ensures that grant and funding requirements are met, and keeps organized records for the grantor/funding source.
- _____ Competently coordinates with field offices to establish a system whereby cases in the project's area are referred to the project for representation or co-counseling
- _____ Attends litigation meetings

- _____ Takes part in relevant training
- _____ Complies with case review and docket control policies
- _____ Keeps accurate records of time spent on each matter s/he works on
- _____ Attends Chapter, Village, school board, community group and client advisory group meetings, and otherwise helps provide community legal education
- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations
- _____ Performs other duties as assigned, such as: _____

Comments: _____

Depending upon Project Coordinator's other duties, this performance evaluation gets attached to that other performance evaluation. For example, if the Project Coordinator is also a Litigator, this form is attached to the Litigator Performance Evaluation.

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Project Administrator - Performance Evaluation

Name of Project Administrator: _____

Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Project Administrator Duties:

_____ Demonstrates a commitment to the ideals of legal services and the Rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area.

_____ Provides high quality legal services to DNA clients; specifically:

_____ Reports directly to the Project Director.

_____ Communicates proficiently in English, especially in writing.

_____ Tracks and summarizes financial statements.

_____ Drafts reports and grant applications.

_____ Conducts public meetings, organizes public comments and suggestions, and synthesizes input into project goals and priorities.

_____ Tracks cases and work performed to meet contracts and grant conditions.

_____ Insures prompt billing of contracts and processing of contract and grant payment.

_____ Uses the computer operating systems and the internet, learns the data-keeping systems quickly and effectively.

_____ Other duties as assigned.

- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Project Administrator improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Project Administrator, and discuss a plan to meet those training needs: _____

D. Recommendation

It is / is not (circle one) recommended that the Project Administrator stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Project Administrator's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL

DNA-People's Legal Services, Inc.

Volunteer Lawyer Program Coordinator - Performance Evaluation

Name of Volunteer Lawyer Program Coordinator: _____

Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Volunteer Lawyer Program Coordinator:

_____ Demonstrates a commitment to the ideals of legal services and the Rights of the poor; understands and is sensitive to the needs of clients, Including problems unique to DNA's service area.

_____ Provides high quality legal services to DNA clients; specifically:

_____ Responsible to the Volunteer Lawyer Program Supervising Attorney.

_____ Recruits private attorneys in the community to assist DNA clients on a pro bono bases.

_____ Maintains PBI entries in PRIME data base, updating attorney Information, entering PBI attorney time.

_____ Attends general case acceptance meetings for potential volunteer lawyer program cases.

_____ Coordinates the Volunteer Lawyer Program Divorce Clinic. Prepares self-help packets as needed for the clinic. Reviews Documents and generates child support worksheets as needed. Coordinates meeting time with volunteer lawyer to review client's documents.

_____ Does eligibilities and conflict checks on potential VLP cases.

_____ Finds private attorneys who will mentor with DNA attorneys On certain type of cases.

_____ Assists the volunteer attorneys in drafting letters, drafting pleadings, assisting clients with filing of documents in court. Assist volunteer attorney in preparing materials needed for any communication education events.

_____ Generates PBI reports as needed by the Director of Development, Development Assistant and/or Director of Administration.

_____ Coordinates the annual Awards Luncheon.

_____ Coordinates non-attorney volunteers, i.e., clerical Worker, volunteer social worker.

_____ Other duties as assigned.

_____ Is familiar and complies with DNA's policies and procedures.

_____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the VLP Program Coordinator improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the VLP Program Coordinator, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the VLP Program Coordinator stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the VLP Program Coordinator's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Litigator Performance Evaluation

Name of Litigator: _____ Date of Evaluation: _____

Job Title (circle one) Tribal Court Advocate Advocate Trainee Staff Attorney

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Attorney/Advocate Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Within 1 year after starting work, became admitted to the state/tribal bar in which they will be practicing

_____ Provides high quality legal services to DNA clients; specifically:

_____ Understands and analyzes legal issues presented in a case

_____ Spots legal issues, even if client doesn't articulate them

_____ Writes letters which are useful and understandable to the client

_____ Effectively writes pleadings and briefs

_____ Verbally conveys complex legal issues to the client in an understandable way

_____ Makes effective and coherent arguments in court

_____ Makes appropriate objections in court

_____ Appropriately preserves issues for appeal

_____ Negotiates appropriate settlements

- _____ Respects clients' decisions
- _____ Maintains a professional manner with adverse parties/counsel
- _____ Maintains and appropriate caseload
- _____ Is familiar with relevant jurisdictions' Statutes of Limitations
- _____ Exercises independent judgment in handling cases within bounds of his/her ethical responsibilities
- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:
 - _____ Does not handle cases (s)he knows are prohibited by LSC (such as abortion, assisted suicide, fee-generating cases, cases outside of DNA's priorities, cases outside of DNA employment, evictions related to drug convictions etc).
 - _____ Keeps timely and accurate timeslips in Kemp's/Prime for each matter on which s(he) is working
 - _____ Keeps accurate records in Kemp's/Prime of activities and updates on cases and other matters
 - _____ Closes files in a timely manner
 - _____ Obtains Retainer Agreements from clients
 - _____ Obtains Statements of Facts from clients when (s)he represents the petitioner
 - _____ Ensures that client has verified they are a US Citizen, or are otherwise eligible aliens
 - _____ Reviewed client's income and asset information, and brings it to the Managing Attorneys' attention if (s)he knows it's incorrect
- _____ Is familiar, and complies with the provisions of other funding sources
- _____ Takes part in DNA trainings, and maintains required CLEs in her/his relevant bar
- _____ Complies with case reviews by Litigation Director and/or other senior attorneys

- _____ Complies with docket control policies
- _____ Takes part in office intake
- _____ Takes part in Do It Yourself Legal Clinics
- _____ Participates in and positively contributes to GCA meetings
- _____ Provides constructive input to Managing Attorney about DNA's policies and operations
- _____ Is available to the public on work days, or appropriately designates someone to do this in his/her absence.
- _____ Effectively works with other staff members in the office
- _____ Effectively delegates work to support staff
- _____ Takes direction and constructive criticism well
- _____ Attends Chapter, Village, school board, community group and client advisory group meetings, and otherwise helps provide community legal education.
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Litigator improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Litigator, and discuss a plan to meet those training needs:

F. Recommendation

It is / is not (circle one) recommended that the Litigator stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Litigator's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Paralegal Evaluation

Name of Paralegal: _____
Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Paralegal Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Provides high quality legal services to DNA clients; specifically:

_____ Reports to Managing Attorney.

_____ Works closely with litigators to gain knowledge of legal practice.

_____ Performs legal research and prepares tribal, state and Federal court pleadings.

_____ Conducts client interviews and investigates cases. Handles Cases in administrative settings with supervision of a licensed attorney.

_____ Takes part in office intake.

_____ Complies with case review and docket control policies.

_____ Keeps accurate records of time spent on each matter on which he/she is working.

_____ Helps provide community education.

_____ Performs other duties as assigned.

- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Paralegal improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Paralegal, and discuss a plan to meet those training needs:

F. Recommendation

It is / is not (circle one) recommended that the Paralegal stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Paralegal's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Legal Secretary Performance Evaluation

Name of Legal Secretary: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Legal Secretary Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Cheerfully receives visitors and callers to the DNA office

_____ Maintains DNA's sign-in sheet for visitors and callers seeking information and/or legal assistance

_____ Provides visitors and callers with as much information as possible (such as intake times, information about Do It Yourself Legal Clinics, availability of telephone intake, and referrals to brochures, self-help forms, DNA's kiosk, and websites), without engaging in the Unauthorized Practice of Law

_____ Tracks information/referrals given on DNA's sign-in sheet, and regularly enters information/referrals given to visitors as "Other Services" in Kemp's/Prime

_____ Maintains a clean, welcoming, and informational waiting area

_____ Proficient in typing and proofreading

_____ Drafts pleadings and discovery requests, including cite-checking; takes the initiative to locate and use prior similar pleadings/discovery

_____ Drafts letters to clients or others

_____ Proficient with DNA's computer systems, specifically:

_____ Proficient in running conflict checks in Kemp's/Prime

- _____ Enters accurate and complete eligibility slips in Kemp's/Prime
- _____ Enters accurate and complete client information in Kemp's/Prime
- _____ Enters accurate and complete closing information in Kemp's/Prime
- _____ Proficient in using Microsoft Word
- _____ Proficient in using Microsoft Outlook, including using office-wide calendars, tasks, and permanently deleting old e-mails/sent items
- _____ Proficient in using Microsoft Excel
- _____ Proficient in using Shipstream Postage system
- _____ When computer systems are down, notifying the IT Department and working cooperatively with them to restore systems
- _____ Proficient in using and maintaining copiers, shredders, telephone systems, typewriters and other office equipment; takes initiative to notify the Office Manager, or in his/her absence, call for repairs when equipment is not fixable
- _____ Makes travel arrangements for litigation staff
- _____ Completes travel expense reports for litigation staff
- _____ Effectively and efficiently prepares and maintains client files
- _____ Effectively interprets for staff and clients as needed
- _____ Willingly substitutes for absent support staff
- _____ Willingly makes copies for litigators
- _____ Proficiently uses dictation equipment
- _____ Gives each litigator a printed list of open cases every Monday
- _____ Effectively maintains the office's tickler system, specifically:
 - _____ Keeps an office-wide calendar available to all staff
 - _____ Dockets court hearings on that calendar as Notices of Hearing arrive
 - _____ Dockets staff appointments on that calendar

- _____ Insists that all staff enter their schedules on the office-wide calendar
- _____ When tickler forms are used, distribute these in a timely manner
- _____ When an office-wide tickle system is used, keep files neatly
- _____ Prepares and mails outgoing mail
- _____ Picks up incoming mail, and documents from the court
- _____ Accurately keeps incoming mail log
- _____ Accurately distributes incoming mail
- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:
 - _____ Alerts Managing Attorney/Advocate to cases (s)he knows are prohibited by LSC (such as abortion, assisted suicide, fee-generating cases, cases outside of DNA's priorities, cases outside of DNA employment, evictions related to drug convictions etc).
 - _____ When requested, enters accurate timeslips in Kemp's/Prime for litigators
 - _____ Updates Kemp's/Prime client record notes with work (s)he does on a case, or conversations with clients
 - _____ Closes files in a timely manner after receiving it from litigator
 - _____ Checks to ensure Retainer Agreements are signed by clients
 - _____ Checks to ensure Statements of Facts from clients when DNA represents the petitioner
 - _____ Ensures that client has verified they are a US Citizen, or are otherwise eligible aliens
 - _____ When checking client's income and assets, brings information about potentially over-income or over-asset clients to the Managing Attorneys' attention

- _____ Is familiar, and complies with the provisions of other funding sources
- _____ Takes part in DNA trainings; takes initiative to get oneself trained in additional legal secretarial skills
- _____ Participates in and positively contributes to GCA meetings
- _____ Provides constructive input to Managing Attorney about DNA's policies and operations
- _____ Is available to the public and litigators on work days, or appropriately designates someone to do this in his/her absence
- _____ Effectively works with other staff members in the office
- _____ Cheerfully receives assigned work from litigators, and completes that work accurately and in a timely manner
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Legal Secretary improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement: _____

C. Training Needs

Identify training needs of the Legal Secretary, and discuss a plan to meet those training needs:

F. Recommendation

It is / is not (circle one) recommended that the Legal Secretary stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Legal Secretary's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Office Manager Performance Evaluation

Name of Office Manager: _____ Date of Evaluation: _____

Name of Evaluator: _____, Managing Attorney

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Office Manager Duties

- _____ Prepares all personnel forms at field office
- _____ Ensures that time sheets are completed by all field staff, and submitted in a timely manner to Accounting
- _____ Tracks needed supplies in the office and orders supplies; ensures that purchases of supplies are within the office's annual supply budget
- _____ Works with Purchasing Manager on supply budget, and on any office purchases outside of the supply budget
- _____ Keeps current records of office property
- _____ Maintains postage meter balance, and requests funds to replenish it
- _____ Completes bi-annual Litigation Report and forwards to the Central Office on a timely basis (list of all clients for whom office litigators represented the petitioner from January-June and July-December of each year)
- _____ Compiles statistical information and submits on a timely basis to the Central Office as requested
- _____ Collects notary and copying fees and transmits them to the Central Office
- _____ Maintains and safely stores Petty Cash box, reimburses staff for purchases of less than \$25, assures that receipts or invoices are obtained for all Petty Cash purchases, and reports to Accounting, with a request to replenish the account
- _____ Maintains Attorney Trust Account, including both the client trust and litigation books. Issues and records all checks. Prepares monthly disbursements and

receipts journal, and bi-weekly transmittals to Accounting.

_____ Maintains office's library (receiving updates and integrating them into the existing materials, discarding outdated materials, marking new materials as DNA property, appropriately shelving materials, and insisting that Litigators returned borrowed items from the library area, works with Managing Attorney to assess library needs, and requests purchases of those materials)

_____ Exercises general supervisory authority over legal secretaries and receptionists

_____ Performs other duties as assigned, such as: _____

Comments: _____

Depending upon Office Manager's other duties, this performance evaluation gets attached to that other performance evaluation. For example, if the Office Manager is also a Legal Secretary, this form is attached to the Legal Secretary Performance Evaluation.

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Receptionist Performance Evaluation

Name of Receptionist: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Receptionist Duties

_____ Demonstrates a commitment to the ideals of legal services and the rights of the poor; understands and is sensitive to the needs of clients, including problems unique to DNA's service area

_____ Cheerfully receives visitors and callers to the DNA office

_____ Maintains DNA's sign-in sheet for visitors and callers seeking information and/or legal assistance

_____ Provides visitors and callers with as much information as possible (such as intake times, information about Do It Yourself Legal Clinics, availability of telephone intake, and referrals to brochures, self-help forms, DNA's kiosk, and websites), without engaging in the Unauthorized Practice of Law

_____ Tracks information/referrals given on DNA's sign-in sheet, and regularly enters information/referrals given to visitors as "Other Services" in Kemp's/Prime

_____ Maintains a clean, welcoming, and informational waiting area

_____ Proficient with DNA's computer systems, specifically:

_____ Proficient in running conflict checks in Kemp's/Prime

_____ Enters accurate and complete eligibility slips in Kemp's/Prime

_____ Enters accurate and complete client information in Kemp's/Prime

_____ Enters accurate and complete closing information in Kemp's/Prime

_____ Proficient in using Microsoft Word

- _____ Effectively and efficiently prepares and maintains client files
- _____ Effectively interprets for staff and clients as needed
- _____ Voluntarily substitutes for absent support staff
- _____ Cheerfully receives assigned work from litigators, such as making copies, sending faxes, and drafting simple letters or pleadings, and completes that work accurately and in a timely manner
- _____ Prepares and mails outgoing mail
- _____ Picks up incoming mail, and documents from the court
- _____ Accurately keeps incoming mail log
- _____ Accurately distributes incoming mail
- _____ Is familiar and complies with DNA's policies and procedures.
- _____ Is familiar and complies with the provisions of the LSC Act and LSC regulations, specifically:
 - _____ Alerts Managing Attorney/Advocate to cases (s)he knows are prohibited by LSC (such as abortion, assisted suicide, fee-generating cases, cases outside of DNA's priorities, cases outside of DNA employment, evictions related to drug convictions etc).
 - _____ When requested, enters accurate timeslips in Kemp's/Prime for litigators
 - _____ Updates Kemp's/Prime client record notes with work (s)he does on a case, or conversations with clients
 - _____ Ensures that client has verified they are a US Citizen, or are otherwise eligible aliens
 - _____ When checking client's income and assets, brings information about potentially over-income or over-asset clients to the Managing Attorneys' attention
- _____ Is familiar, and complies with the provisions of other funding sources
- _____ Takes part in DNA trainings; takes initiative to get oneself trained in additional receptionist/legal secretarial skills

- _____ Provides constructive input to Office Manager or Managing Attorney about DNA's policies and operations
- _____ Is available to the public and litigators on work days, or appropriately designates someone to do this in his/her absence
- _____ Effectively works with other staff members in the office
- _____ Trains new secretarial staff in switchboard and receptionist duties
- _____ Takes direction and constructive criticism well
- _____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Receptionist improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Receptionist, and discuss a plan to meet those training needs:

F. Recommendation

It is / is not (circle one) recommended that the Receptionist stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Receptionist's salary to \$_____ per year.

Evaluation completed after the input from the following DNA staff:

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)

PERSONAL AND CONFIDENTIAL
DNA-People's Legal Services, Inc.
Custodian Performance Evaluation

Name of Custodian: _____ Date of Evaluation: _____

Name/Title of Evaluator: _____

Each rating should be on a scale of: 3 - Outstanding, clearly a strength (comments appreciated)
2 - Solid, more than adequate
1 - Needs improvement (*comments required*)
DK - Don't Know (Insufficient experience in this area to rate)

A. Custodial Duties

- _____ Works cooperatively with DNA staff
- _____ Understands and follows DNA's confidentiality requirements
- _____ Understands and follows oral and written instructions
- _____ Effectively sweeps, dusts, strips, seals, mops, waxes and polishes floors
- _____ Vacuums and shampoos rugs
- _____ Washes windows and walls
- _____ Empties and cleans waste receptacles, and takes trash to disposal areas
- _____ Cleans light fixtures, replaces light bulbs and fluorescent tubes
- _____ Dusts and polishes woodwork, desks, shelves, file cabinets, tables and other furniture
- _____ Cleans restrooms and replenishes toilet tissue, paper towels and soap
- _____ Moves furniture or equipment as needed
- _____ Observes, checks, and reports unauthorized personnel in and around buildings
- _____ Secures building after cleanup
- _____ Provides constructive input to Office Manager about building/grounds needs, and on office policy

_____ Attendance is good, appropriately designates someone to do duties in his/her absence

_____ Takes direction and constructive criticism well

_____ Performs other duties assigned, such as: _____

Comments: _____

B. Areas of Improvement

List areas that DNA would benefit from the Custodian improving upon. This should include no more than 3 areas of improvement, and should include a plan to achieve the improvement:

C. Training Needs

Identify training needs of the Custodian, and discuss a plan to meet those training needs:

D. Recommendation

It is / is not (circle one) recommended that the Custodian stay on in that position in the _____ DNA office.

A salary increase of _____ is recommended, which will bring the Custodian's salary to \$ _____ per year.

Evaluation completed after the input from the following DNA staff: _____

(Signature of Evaluator)

(Date signed)

RECOMMENDATION APPROVED BY:

Executive Director

(Date signed)