



Professional Career Systems in Housing Management

Participant's Workbook



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February, 1979

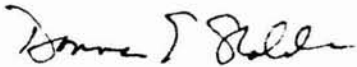
The research forming the basis for this workshop was conducted pursuant to Grant #H-2225G between the U.S. Department of Housing and Urban Development and Temple University. Statements and information contained in this workshop are those of the grantee who assumes sole responsibility for its accuracy and completeness.

FOREWORD

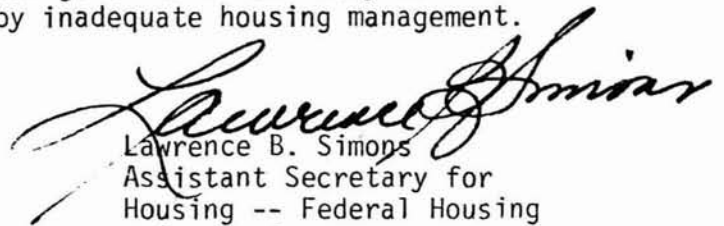
This workbook is one of eighteen in a housing-management curriculum developed by HUD in conjunction with Temple University. It is not easy. The workshops, for which this and the other workbooks are texts, will not be what we used to call Mickey Mouse sessions. And that, of course, is all to the good. Your time is valuable, and you are learning for a purpose. Any course you take should repay the efforts you must put in.

We believe that the workshops will do exactly that. At the end, after putting your new learning to practical use, you should feel not only a sense of satisfaction because of your enhanced competence, but you should also think of yourself as a housing-management professional, capable of dealing skillfully and humanely with anything the job throws at you.

Your instructor has a text similar to this one (with all the answers supplied) and a guide to conducting the workshops. The guide is a good one, stressing that the participants should be encouraged "to explore, risk, share, and feel." We hope you will. From there, and with your help, we can go on to reduce many of the serious problems brought about by inadequate housing management.



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PREFACE

Each workbook in this series presents a number of learning objectives targetted to a selected area of management. Successful completion of the learning objectives presented in each workbook provides a series of building blocks to buttress the spectrum of skills required of a housing manager.

In preparing these workbooks, an attempt has been made to incorporate the range of knowledge that housing managers might be required to draw upon. Likewise, an attempt has been made to reflect the present state-of-the-art of housing management. Inevitably, whatever is captured in print reflects a body of knowledge and practice up to the point of publication. Therefore, the students and instructors making use of these workbooks will want to keep alert to new developments that should be integrated into the workbook material. Furthermore, like any attempt to codify knowledge in a particular field, the material presented in these workbooks is open to differences of interpretation and emphasis. We are aware that there may be some techniques and procedures described in these workbooks with which some experts in the field might disagree. The best test of such procedures and techniques will come when they are applied in the field by housing management practitioners. Through this process, the state-of-the-art will continue to be improved. Instructors in the future will undoubtedly want to incorporate such acknowledged improvements into their delivery of the workbook material.

One final point is worth mentioning. An initial impetus for these workbooks was the need to upgrade management skills in HUD-related housing. However, many of the principles presented should be viewed by students and instructors as applicable to multifamily housing management practices in the private sector.

ACKNOWLEDGEMENTS

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INTRODUCTION

Career systems increase the advancement and professional development opportunities for all employees in a given organization. A major by-product of such systems is improved quality and quantity of agency services. This workshop strives to familiarize you with the five major components of a career system and to enable you to adapt those components within different organizational contexts. Accordingly, it has six overall goals:

1. To introduce you to the career system concept;
2. To define job analyses and discuss their importance;
3. To define a standardized, performance-based evaluation mechanism and describe a model performance-based evaluation system;
4. To define a career ladder, discuss its importance and suggest guidelines for adapting a model career ladder to an existing career structure;
5. To define accredited training and education programs, discuss their importance, and suggest guidelines for identifying training needs within different organizational contexts; and
6. To define organizational supports, discuss their importance, and suggest guidelines for developing organizational supports within different organizational contexts.

Each goal has several learning objectives. These six learning objectives are, simply, measurable statements about the specific knowledge you are expected to acquire in the workshop.

Each learning objective, in turn, has what is called an anticipated practice outcome. Anticipated practice outcomes are those practical skills you can be expected to implement on the job using the information acquired in the workshop.

In other words, anticipated practice outcomes refer to the ways knowledge acquired in the workshop can be applied to real problems and situations.

The workshop, organized around the learning objectives and anticipated practice outcomes, requires four half-day sessions. Goal Area 1 will be covered in Session 1. Goal Area 2 will be covered in Session 2. Session 3 will cover Goal Areas 3 and 4, and Session 4 will cover Goal Areas 5 and 6.

GOAL AREA 1

TO INTRODUCE YOU TO THE CAREER SYSTEM CONCEPT

GOAL AREA 1: TO INTRODUCE YOU TO THE CAREER SYSTEM CONCEPT

LEARNING OBJECTIVES

1. You will list the five (5) major elements of a career system.
2. You will list seven (7) of the essential provisions of a career system.

ANTICIPATED PRACTICE OUTCOMES

1. You will examine a hypothetical career system and identify three (3) missing elements.
2. You will examine a hypothetical career system and identify three (3) missing provisions.

CONTENT

The Career System Concept

A Career System is an organizational strategy aimed at upgrading or "professionalizing" the quality and efficacy of agency services through increasing the career advancement and professional development opportunities for all employees of a given organization. The term "system" is used to describe the interrelationships among the various components which work together to expand these opportunities. The major components of a career system are:

1. Job Analyses
2. A Standardized, Performance-Based Evaluation Mechanism
3. A Career Ladder
4. Accredited Training and Education Programs
5. Organizational Supports

The crucial point in considering the concept of a career system is that any one of these five sub-systems alone is not generally sufficient for the enhancement of career advancement and professional development; it is the interaction and feedback among these sub-systems which enable the organization to meet these objectives.

This point is illustrated quite clearly in a critique of human service career ladders by Alan D. Haber in an article entitled *New Careers: Issues Beyond Consensus*.¹ Haber discusses the need for including the

following provisions in any program which is truly intent on opening up careers to non-professionals:

1. Entry level positions.
2. Training for effective job performance.
3. Adequate starting salaries.
4. Visible career ladder which includes professional positions.
5. Availability of relevant training on all levels.
6. Access to training and the ladder for all employees.
7. Agency responsibility for training.
8. Certified higher education programs with modified curriculum which is job-relevant, including in-service courses and on-the-job experience.
9. Incorporation of new jobs into the agency structure.
10. Standardization of experience, education, and certification requirements to increase mobility across agencies and specialties.

Recommendations such as these arise from the experience of the new careers movement, which has increased the employment of nonprofessionals in the human service field. The career ladders established to open up career opportunities for non-professionals or for paraprofessionals far too often failed to recognize the new careerists as an integral part of the organization and relegated them to an ancillary role which stopped short of professional recognition. The result was a limited 3 or 4 step career ladder which did not open up career pathways and did not provide for formal recognition of experience or skills by other agencies. The concept of a Career System is an attempt to prevent the replication of these past mistakes.

A recent study (conducted by the Center for Social Policy and Community Development of Temple University in Philadelphia) supports Haber's argument for a career ladder buttressed by realistic, explicit job descriptions; standardized performance criteria; and mechanisms for evaluation and relevant accredited education and training. This study, which surveyed 7,000 paraprofessionals in the human services, also suggested

that a fifth component is necessary to ensure that policies, allocation of resources, relationships between employees and supervisors, and attitudes of the organization fully support and reflect a commitment to the career development of all employees.²

In addition to addressing the needs of individuals for career mobility and related educational and support services, this model professional career system in housing management is designed to respond to organizational concerns shared by many Local Housing Authorities:

1. The desire to recruit residents into the housing management field.
2. The need for continuing education programs for housing managers at all levels which are relevant to the actual work performed and which will prepare managers for certification.
3. The lack of clear standards for housing management practice.
4. The under-utilization or under-compensation of employee skills or, conversely, over-compensation to workers unqualified for their jobs.
5. The inability to motivate employees due to the lack of available rewards for effective performance, such as higher pay, responsibility, status, and involvement in decision-making.

GOAL AREA 2

TO DEFINE JOB ANALYSES AND DISCUSS
THEIR IMPORTANCE

GOAL AREA 2: TO DEFINE JOB ANALYSES AND DISCUSS THEIR IMPORTANCE

LEARNING OBJECTIVES

1. You will identify five (5) important elements of a job-analysis.
2. You will identify three (3) individual organizational needs which job analyses meet.

ANTICIPATED PRACTICE OUTCOMES

1. You will examine a hypothetical job analysis and correctly identify two (2) missing elements.
2. You will examine five (5) hypothetical organizational needs and identify those parts of a job description which could be helpful in addressing such needs.

CONTENT

The first major component of a career system is a set of job analyses. The Job Analyses which form the foundation of the model career system in housing management are based on an analysis of the functions of housing management personnel across the country, identified by NAHRO and utilized as the basis for its Certification Examination. For each model position, the analysis identifies:

1. Job Title
2. Organizational Relationships
 - lines of authority
 - lines of communication
3. Job Summary
4. Duties and Tasks
5. Skill and Knowledge Requirements
6. Performance Evaluation
7. Qualifications
8. Salary Range
9. Attachment of Forms Used in Carrying Out Job Responsibilities

The job analyses enable each employee to clarify the expectations of

his or her role within the organization; to know what constitutes effective performance in the job; and to identify those items of skill, knowledge, and experience which are required for promotion. The organization is able to recruit and deploy staff more effectively by matching the requirements of each job with the demonstrated competencies of the employee. The job analyses also facilitate the improvement of housing management practices by including all the functions considered basic to good management and by providing a standardized basis for the development of a performance accountability mechanism.

In many programs which develop paraprofessional career ladder and training systems, employees themselves take an active role in the analysis of their own jobs. This results in revised job descriptions which reflect work actually performed more closely, and which result in a number of cases in increased responsibilities, including work requiring higher levels of skill, knowledge and responsibility. The involvement of staff in this process increases the amount of recognition they receive within their organization and results in a more effective deployment of skills to meet the organization's objectives. Further, such involvement encourages staff to consider more seriously the career to which they can aspire and clearly identify the steps necessary for advancement.⁴

A complete set of job analyses for the nine Housing Management positions of the Model Career System can be found in the Appendix to the instructor's guide. Goal Area 3 includes guidelines for developing job analyses for each housing management position within a specific authority which take into account actual work being performed and additional job functions previously unassigned but considered important for effective management.

(a) Guidelines for Developing New Job Descriptions Based on the Model Job Analyses of the Professional Career System in Housing Management.

The model job analyses included in the Appendix are based on a task analysis of various housing management personnel across the country. Obviously the duties and tasks in particular authorities will differ to varying degrees. Thus, it is not possible to simply adopt these analyses without modifications.

To be effective, job analyses must represent the actual work performed by each job title. Therefore, it is imperative that representatives from each job title be involved in reviewing the analyses and in assessing the appropriateness of tasks currently assigned to each job title. Duties and responsibilities which require skills and information either above or below the abilities or competencies of the employees in each job title should be adjusted or provided for in the training component of the career system. Once completed, the analyses meet a number of individual and organizational needs by:

1. Providing a clear description of how the job title fits into the total organization, in terms of authority, communications, and advancement opportunities.
2. Providing a detailed description of the duties and tasks each position is responsible for.
3. Providing a detailed description of the knowledge and skills required for effective job performance which can be utilized to develop relevant training programs.
4. Providing a standard basis for developing a mechanism for performance evaluation.
5. Providing standard criteria for hiring or promotion.

The analysis is divided into seven (7) areas:

1. Job Title
2. Organizational Relationships
 - 2.1 Lines of Authority
 - 2.2 Lines of Communication
 - 2.3 Step on Career Ladder
3. Job Summary
4. Specific Duties and Tasks
5. Skill and Knowledge Requirements
6. Performance Evaluation
7. Qualifications
8. An 8th area, not included in the model analyses, would be the salary range.
9. Attachments of the forms and reporting procedures for each job title facilitate future orientation and training activities.

A suggested process for developing relevant job analyses is to draft new analyses based on an integration of the model with the existing job descriptions and with information about what people actually do gathered through interviews and observation. The drafted analyses can then be reviewed by a committee representing all the job titles. Since job duties change over time, it is important to reanalyze and revise the existing analyses periodically.

GOAL AREA 3

TO DEFINE A STANDARDIZED, PERFORMANCE-BASED EVALUATION
MECHANISM, AND DESCRIBE A MODEL PERFORMANCE-BASED EVALUATION SYSTEM

GOAL AREA 3: TO DEFINE A STANDARDIZED, PERFORMANCE-BASED EVALUATION MECHANISM AND DESCRIBE A MODEL PERFORMANCE-BASED EVALUATION SYSTEM

LEARNING OBJECTIVES

1. You will describe three (3) elements of performance-based evaluations.
2. You will describe two (2) elements of management-by-objectives evaluations.

ANTICIPATED PRACTICE OUTCOMES

1. You will examine a hypothetical report of a worker's job performance and make three (3) suggestions for evaluating it according to performance-based criteria.
2. You will examine a hypothetical report of a worker's job performance and make three (3) suggestions for evaluating it according to management-by-objectives criteria.

CONTENT

Performance Evaluation Mechanism

The second major component of a career system is a performance evaluation mechanism. A standard mechanism for performance evaluation enables the organization to identify areas where improvement is needed and to provide the necessary training or assistance to facilitate that improvement. Further, performance evaluations provide individuals with official recognition of their contributions and reward outstanding employees by determining their eligibility for promotion. Studies such as those conducted by Umstot⁵ suggest that work goals are more likely to be met when they are mutually agreed upon by supervisor and supervisee.

These findings imply that a performance rating system should be developed for performance evaluation. Such a system is currently being implemented by the Pittsburgh Housing Authority. This rating system combines objective performance criteria, based on job duties and tasks, and a Management by Objectives system to evaluate the work of each employee.

Performance criteria are rated each quarter in the areas of rent delinquency, vacancy loss, budget goals, resident relations, community cleanliness, maintenance backlog, elderly services, and overtime and turnover rates. Such data are collected by a Management Review Board through the standard Authority Monthly reports and the Resident Quarterly Report.

The Management by Objectives approach⁶ implemented in Pittsburgh involves the manager in setting objectives, proposing appropriate actions, reporting the outcomes of these actions and assessing the effectiveness of the actions in meeting the stated objectives. The quarterly reports are also shared with the Management Review Board, and the results of the two measures are combined to rate overall performance. A rating of this kind, adapted to the specified job duties and responsibilities of each employee, provides a clear, standardized, performance-based evaluation, requiring employee participation.

(b) Guidelines for Developing Performance-Based Evaluation Mechanisms

OVERVIEW STATEMENT

With the recent Authority reorganization, the Community Manager has become, more than ever before, the key management level of public housing. Primary responsibilities for decision making in the areas of budget, personnel and services have been in effect moved into the Community Manager's domain of responsibilities. To make this system work, it is essential that an adequate planning and evaluation tool be developed to assist and to monitor the work of the Community Manager. The Performance Rating System and the Management By Objectives Planning Model are two such tools that will be utilized.

PERFORMANCE RATING SYSTEM

The PRS contains two components. The first is the Performance Data Form which is a quarterly statistical record of an individual manager's actual performance in nine essential management areas: (1) Rent Delinquency, (2) Vacancy Loss, (3) Meeting Annual Budget Costs, (4) Tenant Relations, (5) Community Cleanliness, (6) Craft Maintenance Backlog, (7) Elderly Services, (8) Overtime, (9) Turnover Rate. Data for the PDF will be based upon the standard Authority monthly reports in each respective area except for items 4 and 5. These two categories require Tenant Council Participation in the completion of the Tenant Quarterly Report. All data will be compiled for review by the Administrative Committee of Directors.

The second element in the PRS consists of a Criteria Reference Evaluation Report. The CRER will be completed by the Management Review Board on a quarterly basis for each Community Manager. The Administrative Review Committee shall consist of: Executive Director, Directors of Management, Maintenance and Services, Comptroller and Legal.

MANAGEMENT BY OBJECTIVES

The MBO system is designed both as a planning tool and as a monitoring system. This system consists of four segments to be completed on an appropriate schedule during a quarterly cycle. The sections are entitled: (1) Problem and Resource Analysis, (2) Revised Action Proposal, (3) Experience Report, (4) Growth Summation. This system is sequentially organized from point one which looks back upon the quarter and analyzes the achievements or problems that occurred. This tool is designed to give both the Community Manager and the Review Board accurate, current data as to the plans and progress made in specific managerial areas.

Each Community Manager will complete a MBO series for each of the ten management areas previously listed on the PRS. The MRB will examine those MBO reports on a quarterly basis.

CRITERIA REFERENCE EVALUATION REPORT

POINT SYSTEM

For each quarter, a Community Manager will receive a point score in each of the nine categories on the PDF. These scores will be totaled for an overall Quarterly Performance Score which shall form the basis for the Review Board's Recommendations. A quarterly and yearly average (to be designated by the Board) must be maintained for an acceptable performance rating. The categories to be rated have been given a designated priority rating that sets the limits to the number of points to be achieved in that area each quarter. Areas given a Priority One designation each have a possible ten points to be achieved. Areas designated Priority Two have a possible five points, and areas designated Priority Three have a possible two points.

PERFORMANCE RATING SYSTEM

Rating:

Acceptable _____

Requires Improvement _____

Unacceptable _____

Quarter _____

Date _____

Review Board Signatures _____

PERFORMANCE DATA

Manager _____

Quarter _____

Community _____

_____ %	RENT DELINQUENCY	CRAFT MAINTENANCE BACKLOG	Hrs. _____
\$ _____	VACANCY LOSS	ELDERLY SERVICES	
\$ _____	MEETING ANNUAL BUDGET GOALS (Margin of Overrun)	PRIORITY THREE	
Positive _____ Requires Improvement _____	TENANT RELATIONS*	OVERTIME	Hrs. _____
Acceptable _____ Requires Improvement _____	COMMUNITY CLEANLINESS*	TURNOVER RATE	#'s _____

*(To be completed by Appropriate Tenant Representative)

Management-Resident Relations Advisory Report

Quarter _____

Date _____

_____ (Signature)

Representative(s) _____ (Signature(s))

Has the overall relationship between the Manager and the Tenant Been

Positive _____ *In Need of Improvement _____

*If in need of improvement, please state specific areas of concern:

Comments:

COMMUNITY CLEANLINESS ADVISORY REPORT

Quarter _____

Manager _____ (Signature)

Community _____

Tenant Representatives _____ (Signature(s))

(1) Overall community cleanliness (External)

Good ____ Fair ____ Requires Improvement ____

*If requires improvement, please specify areas that need attention
(Street, Locations, etc.)

(2) Overall community cleanliness (Internal - Hallways, etc.)

Good ____ Fair ____ Requires Improvement ____

*If requires improvement, please specify areas that need attention
(Address, Floor, etc.)

CRITERIA REFERENCE EVALUATION

Priority Area One

Category	Performance	Score
Rent Delinquency		
Vacancy Loss		
Meeting Annual Budget Goals		
Tenant Relations		
Community Cleanliness		

Possible Score: 50 Total Score ____

Priority Area Two

Category	Performance	Score
Craft Maintenance Backlog		
Elderly Services		

Possible Score: 10 Total Score ____

Priority Area Three

Category	Performance	Score
Overtime		
Turnover Rate		

Possible Score: 2 Total Score ____

Quarter _____

MANAGEMENT BY OBJECTIVES

MANAGER _____

COMMUNITY _____

OBJECTIVE _____

What PROBLEMS do you anticipate encountering during the next quarter?

What RESOURCES are there within your PROJECT for dealing with them?

What RESOURCES are there outside your Project for dealing with them?

How do you plan to handle the above PROBLEMS?

EXPERIENCE REPORT

<p>Describe the principal actions taken this month to accomplish the above objective.</p>	<p>What was the observable incidence that each action had the effects you anticipated? . . . or that it had other effects?</p>
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GROWTH SUMMATION

In Comparing your Actual EXPERIENCES this quarter with your plan, what things happened that you might not have foreseen?

HINDSIGHT

What actions planned last quarter did not turn out as expected?

What unexpected favorable developments occurred this quarter?

GROWTH

What have you learned that will improve performance in the next quarter?

GOAL AREA 4

TO DEFINE A CAREER LADDER, DISCUSS ITS IMPORTANCE, AND
SUGGEST GUIDELINES FOR ADAPTING A MODEL CAREER LADDER
TO AN EXISTING CAREER STRUCTURE

GOAL AREA 4: TO DEFINE A CAREER LADDER, DISCUSS ITS IMPORTANCE, AND SUGGEST GUIDELINES FOR ADAPTING A MODEL CAREER LADDER TO AN EXISTING CAREER STRUCTURE

LEARNING OBJECTIVES

1. You will define four (4) essential elements of a career ladder.
2. You will list seven (7) steps in adapting the model career ladder to an existing career structure.

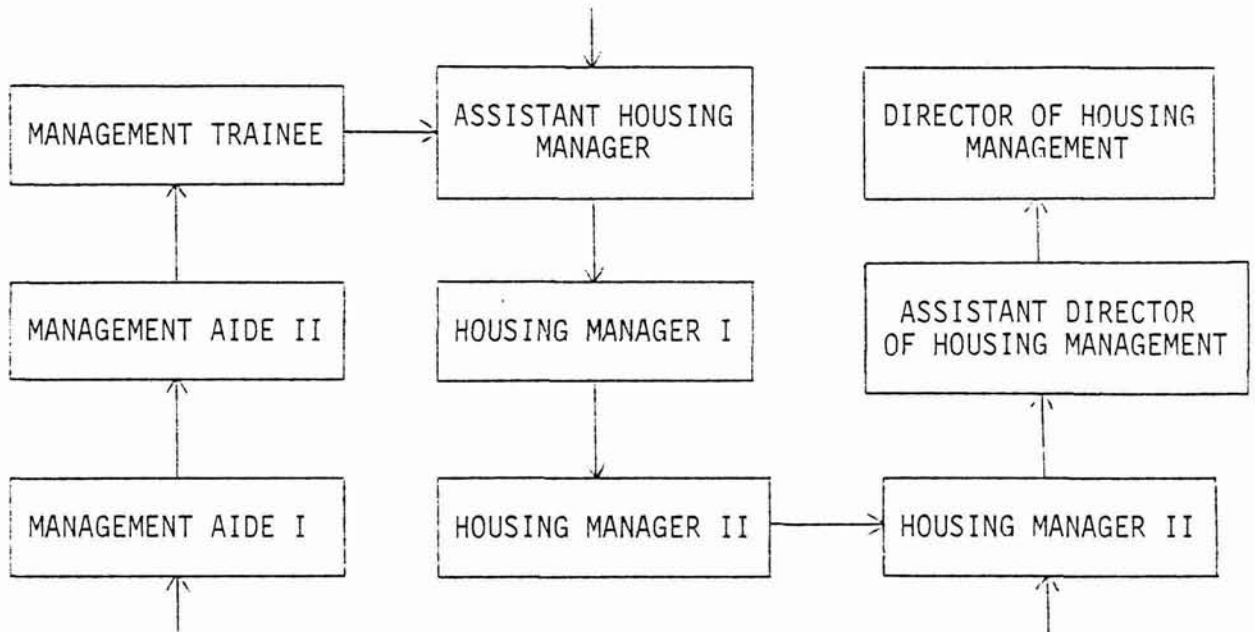
ANTICIPATED PRACTICE OUTCOMES

1. You will assemble nine (9) career ladder positions into a workable career ladder.
2. You will examine a case study and make three (3) suggestions for improving the way a hypothetical housing authority adapted the model career ladder to its career structure.

CONTENT

The third major component of a career system is a career ladder. A career ladder utilizes the clear descriptions contained in the job analyses of the responsibilities, duties, tasks, knowledge, skills, experience and education or certification requirements for the various positions and identifies the relationship of each position to all other positions in the hierarchy. The ladder arranges these jobs in order of ascending levels of responsibility and requirements, and assumes that effective performance on one level, coupled with satisfactory completion of additional training, prepares the individual for advancement to the next level. The ladder also provides entry points to recruit residents and graduates of accredited A.A., B.A., and M.A. Programs into the Authority. The diagram on the next page graphically represents the Career Ladder components of the Model Professional Career System in Housing Management.

THE MODEL CAREER LADDER



The inclusion of nine Housing Management positions in the career ladder (see diagram above) ensures that entry level positions are incorporated into the agency structure, that all employees have access to career advancement and job-relevant training and that gradual promotional opportunities are available. Thus the model career ladder avoids locking non-degreed personnel into a separate and limited career ladder and facilitates the accumulation of the college credits which are required for advancement to the upper grades. Furthermore, by including all management positions, middle management personnel are helped to advance, thereby opening up higher positions for entry level personnel.

It is theoretically possible for a person entering the Career System at Grade I on the Career Ladder to enroll in three credit hours of in-service training and to take three hours in an academic degree program in

housing management each year. In eight years, the employee could have accumulated 48 college credits, eight years of experience and could have advanced to Grade VII of the career system. Grade VIII of the model system, Assistant Director of Housing Management, requires a B.A. degree, Certification, and three years experience in directing and coordinating and supervising managers of a group of residential developments. Depending upon the academic program in which the employee is enrolled, it might be possible to receive an additional one and one-half years of college credit for life experience. This would then leave the employee one year short of a degree. This year could be completed on either a full-time or half-time basis if the LHA provided educational leave.

(c) Guidelines for Adapting the Model Career Ladder to an Existing Career Structure

The suggested process for adapting the model career ladder for housing managers to a particular housing authority's career structure are keyed to the columns of the attached work sheet. Although the process can easily be completed by an individual, it is strongly suggested that this and other planning activities be reviewed by a representative team of LHA personnel prior to implementation.

- STEP 1. Plot every existing position responsible for housing management activities at the career ladder grade which most closely approximates the requirements and responsibilities of the grades in the model. For example, a position requiring an A.A. Degree or equivalent combination of education and experience would be placed at Step IV on the chart.
- STEP 2. Identify the number of persons currently employed in each position.
- STEP 3. Identify the gaps in the existing career structure and propose new positions to fill them. These positions should have clear management responsibilities. Thus a clerk position which is primarily responsible for clerical duties should not be used as an entry level position in housing management. However, clerks should have the opportunity to enter the housing management system upon completion of the identified training.
- STEP 4. Identify the employees who, without additional training, would qualify for either a promotion or would be transferred to a new job title.
For example, if a new position is created at Step II, there may be some people at Step I who qualify for promotion. There may be people at the lower salary levels of Step III whose experience and responsibilities more closely approximate Step II and they should be transferred to the new job title. The latter case is most likely to occur when the same job title is held by a large number of people whose education, experience, salaries and actual job responsibilities vary to a significant degree.
- STEP 5. Estimate the annual cost to the Authority of making the proposed transfers and promotions.
- STEP 6. Identify the official procedure required to establish new positions within the agency.
- STEP 7. Prior to each training program determine the costs of any promotions resulting from successful completion of the training.

Career Ladder Level	Summary of Qualifications	Existing Job Titles	Number Employed	Proposed New Positions to Fill Gaps	Staff qualified for transfer or promotion without additional training	Annual Cost of Proposed Transfers or Promotions	Procedures to establish new positions	Priority
I	Resident pref. Experience in helping others resolve problems, paid or volunteer. 50 hours competency based training.							
II	1 year experience as M.A. I or equivalent. 50 hours competency based training.							
III	A.A. degree or combination of approved education & experience to total 3 years. 50 hours competency based training.							
IV	2 years experience plus 6 mos. as M.T. or approved combination of education & experience to total 4 years.							
V	A.A. degree plus 3 years experience in management, admin., superv., or equivalent approved combination of education, experience.							

Summary of Qualifications	Existing Job Titles	Number Employed	Proposed New Positions to Fill Gaps	Staff qualified for transfer or promotion without additional training	Annual Cost of Proposed Transfers or Promotions	Procedures to establish new positions	Priority
<p>B.A. degree plus 1½ yrs. experience in a housing authority, 6 months as H.M. I or equivalent, or approved combination education & experience equal to 5 years.</p> <p>1 year experience as H.M. II or equivalent education and experience to total 6 yrs.</p> <p>B.A. degree plus 3 yrs. real estate management experience plus certification.</p> <p>B.A. degree plus 6 yrs. experience and certification and 2 yrs. as Asst. Director (2 yrs. advanced Degree can sub for 2 years of experience).</p>							

GOAL AREA 5

TO DEFINE ACCREDITED TRAINING AND EDUCATION PROGRAMS, DISCUSS
THEIR IMPORTANCE, AND SUGGEST GUIDELINES FOR IDENTIFYING
TRAINING NEEDS WITHIN DIFFERENT ORGANIZATIONAL CONTEXTS

GOAL AREA 5: TO DEFINE ACCREDITED TRAINING AND EDUCATIONAL PROGRAMS, DISCUSS THEIR IMPORTANCE, AND SUGGEST GUIDELINES FOR IDENTIFYING TRAINING NEEDS WITHIN DIFFERENT ORGANIZATIONAL CONTEXTS

<u>LEARNING OBJECTIVE</u>	<u>ANTICIPATED PRACTICE OUTCOME</u>
1. You will identify three (3) training/education options.	1. You will examine ten (10) case studies and identify appropriate training/education options for each.

CONTENT

The fourth major component of a career system is a comprehensive education and training program. (If resources permit, a combination of the various approaches outlined below can offer the greatest opportunities for staff development.)

Assuming effective job performance is related to the employee's knowledge and skills in specified areas, it follows that performance can be enhanced if training is provided in the areas required by a present job or in preparation for a new assignment. The job analyses provide the specifics to be learned and therefore the basis for planning relevant curricula. However, such training tends to be of a higher quality if it also meets the academic standards of local institutions of higher education. Further, if training meets such standards, it is often possible for institutions of higher education to offer credit for successful completion of the training. The accreditation of in-service courses can also provide many trainees with a successful introductory college experience which may motivate some to continue their education on their own.

Another education and training option is the provision of release time and/or financial reimbursement for education as incentives for employees to obtain needed training at an institution of their choice.

At risk, of course, is a loss of job-relevancy unless the housing authority negotiates with the university or college to adapt existing courses to the training needs of its employees.

One successful variation of a cooperative arrangement with an institution of higher education is an approach used by Temple University's Center for Social Policy and Community Development (CSPCD) with five human service agencies in the greater Philadelphia area. CSPCD trained designated employees from each agency to develop and implement relevant training programs for their individual agencies. These individual training programs were accredited by Temple University and their participants could elect to receive either Continuing Education Units or college credits.

Worksheet: Initial Identification of Training Needs

Career Ladder Step	Job Title	Number of Employees	Training Needs	Training Resources
I				
II				
III				
IV				
V				
VI				
VII				
VIII				
IX				

(4) Guidelines for Identifying Training Needs

Each completed job analyses should identify the specific information and the levels and types of skills required for effective performance of the assigned duties and responsibilities of that job. The training curricula of the educational component of the career system are developed to provide the relevant skills and knowledge identified for each job title.

The attached worksheet can be used to delineate the training needs of each job title and to estimate the number of potential trainees. This information can then be used to determine the strategies for implementing the education component.

For example, if ten employees are in job titles at Step III, the LHA can contract with training resources to provide accredited in-service training in the identified areas for ten trainees. If one individual is in a Step IV job title, the LHA might opt to work with the individual to locate appropriate college level courses or accredited workshops and provide release time and tuition reimbursement to enable the employee to attend off-site educational programs. It should be noted that the education component of the Career System needs to continually respond to both the fluctuating demands for training at each step of the ladder and to changing training needs as job tasks are revised. The development of ongoing relationships with accredited training resources will facilitate the implementation of courses and for workshops as needs arise. A semi-annual review of training needs resulting in the provision of appropriate training mechanisms is recommended.

Worksheet: Semi-Annual Identification of Training Needs

Career Ladder Step	Job Title	No. of Emp. Needing Training	No. of Emp. Needing Training or Promotion For Next Grade	Training Needs	Training Resources
I					
II					
III					
IV					
V					
VI					
VII					
VIII					
IX					

GOAL AREA 6

TO DEFINE ORGANIZATIONAL SUPPORTS, DISCUSS THEIR IMPORTANCE,
AND SUGGEST GUIDELINES FOR DEVELOPING ORGANIZATIONAL SUPPORTS
WITHIN DIFFERENT ORGANIZATIONAL CONTEXTS

GOAL AREA 6: TO DEFINE ORGANIZATIONAL SUPPORTS, DISCUSS THEIR IMPORTANCE, AND SUGGEST GUIDELINES FOR DEVELOPING ORGANIZATIONAL SUPPORTS WITHIN DIFFERENT ORGANIZATIONAL CONTEXTS

LEARNING OBJECTIVES

1. You will correctly identify twenty (20) items as causal, intervening, or output variables in organizational performance.
2. You will cite four (4) examples of organizational supports for a career system.

ANTICIPATED PRACTICE OUTCOMES

1. You will examine a hypothetical organization and identify three (3) causal, three (3) intervening, and three (3) output variables.
2. You will examine a career system within a hypothetical organization and make four (4) suggestions for improving organizational supports.

CONTENT

Organizational Effectiveness

The overall performance of an organization is related to the degree of integration of the goals of the organization and of the goals of the individual employee.⁷ When individual and organizational goals are perceived as similar or directly related, the organization will be better able to meet its goals. When great differences are perceived, the organization will be less effective in meeting its goals.

One measure of organizational effectiveness is an objective assessment of the results of an organization's activities in relation to its stated goals and objectives. Measures of results or output vary. For a coach they might include a team's win-lose record. For a business manager, they might include the company's net profits. For a housing manager, they might include the project's vacancy rate.

Output, however, is the result of the actions of the human resources of an organization. Their actions are in turn determined by their skills, motivations, loyalty, commitment to objectives, ability to communicate,

ability to make decisions effective, and capacity for productive interaction. The human resources within an organization are affected by organizational factors such as internal structure and management style. The manner in which organizational factors act upon human resources to produce results is diagrammed below.⁸

Causal Variables (Organizational Factors)	Intervening Variables (Human Resources)	Output Variables (End Results)
Management Style	Perceptions	Productivity
Management Strategies	Expectations	Costs
Organizational Structure	Role Concepts	Occupancy Rates
Organizational Objectives	Attitudes	Crime Rates
Technology	Workgroup Tradition	Union Relations
	Values and Goals	Turn-over
	Motivational Forces	Vandalism Rates
	Behavior	Earnings

Rensis Likert, author of The Human Organization, views the development of human resources as the long-term key to organizational effectiveness.⁹ Because human resources react to stimuli within the control of the organization, he proposes that efforts to improve organizational effectiveness be focused on causal factors rather than on human resources themselves. Consistent with this approach, the model career system presented herein alters the existing structures, relationships, and policies of the Housing Authority to provide opportunities to each employee for achieving personal goals while simultaneously working for the goals of the organization.¹⁰

ORGANIZATIONAL SUPPORTS

The fifth major component of a career system is adequate organizational support. All four components of the career system previously described require supportive organizational policies which reflect a commitment to the maximization of staff potential by all levels of management. Such commitment does not just happen. In many instances it results from a thorough understanding of the goals and processes of the Career System. In others, it results from learning new ways of thinking about and working with supervisors.

One approach to generating such understanding is through involving all levels of staff in planning and developing the components of the Career System. Special programs, such as training in the implementation of the system for staff and feedback sessions on the program's effectiveness for both, reinforce and better prepare staff members to make a career system work.

Some employees may require personal, career, and/or educational counseling services to help them take advantage of the new options open to them. Others will require assistance with, or reimbursement of, educational costs or release time for additional studies. Although such supportive services and policies may appear expensive in the short term, in the long term they will prove to be a sound investment as reflected in the improved competencies, job performance, attitudes, commitments, and motivations of the human resources of the Local Housing Authority.

Guidelines for Developing Organizational Supports

The ultimate success of a Career System in meeting its goals and objectives depends on the commitment of the housing authority towards maximizing the potential of each employee. This commitment is reflected in organizational policy, in supervisory and employee attitudes, and in the provision of supportive services such as financial and career and personal counseling, child care, and transportation.

Policies which encourage educational advancement through the provision of release-time for education and tuition reimbursement as well in-service training are one example of this commitment. A career and educational counseling service which employees are encouraged to use during job hours is another.

Supervisory attitudes are extremely important. Supervisors should encourage employees to develop and should involve employees in making decisions about their work and how it will be evaluated. Training for supervisors in the purpose, structure, and administrative process of the proposed career system is often necessary.

Peer groups have significant influence on the overall success of a career system and on the amount of individual participation and initiative within the system. When peer support is lacking on the job, mechanisms should be developed to bring together employees motivated to take advantage of the educational opportunities afforded by the career system.

The worksheet on the following page provides a mechanism for matching the needs of employees at each grade in the Career Ladder to existing supportive policies, relationships, and services; for identifying the gaps in the support system; and for setting programmatic priorities.

Worksheet: Assessing Organizational Supports

Career Ladder Grade	Job Title	No. of Employees	Existing Peer Support	Existing Supportive Policies	Existing Supportive Services	Gaps	Potential Resources	Priority

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POST-TEST

POST TEST: WHAT DID YOU LEARN?

1. List the five (5) major components of a career system:

- (a) _____
- (b) _____
- (c) _____
- (d) _____
- (e) _____

2. Place a check next to those items which are not essential provisions of a career system.

- _____ (a) Parallel career ladders for professionals and non-professionals.
- _____ (b) Availability of relevant training.
- _____ (c) Adequate starting salaries.
- _____ (d) Adequate raises based on length of service.
- _____ (e) Standardized experience requirements.
- _____ (f) Access to training and the career ladder for all employees.
- _____ (g) Agency responsibility for training.
- _____ (h) Informal recognition of experience or skills by outside agencies.
- _____ (i) Certified higher education programs.
- _____ (j) Standardized certification requirements.

3. List five (5) important elements of a job analysis.

- (a) _____
- (b) _____
- (c) _____
- (d) _____
- (e) _____

4. Place a check next to those items which are important organizational needs that job analyses meet.

- (a) A clear description of how the job title fits into the total organization.
- (b) A detailed description of the duties and tasks each position is responsible for.
- (c) A detailed description of the information and skills needed for effective job performance.
- (d) A clear description of personnel procedures.
- (e) A standard basis for evaluating performance.
- (f) A detailed rationale for promotions and raises.
- (g) Standard criteria for hiring or promotion.
- (h) A detailed rationale for transfers and terminations.

5-6. Do the following elements of evaluation relate to performance-based evaluation or to management-by-objectives evaluation?

	Performance-based Evaluation	Management-by-Objectives Evaluation
(a) Setting objectives and tasks		
(b) Rating objective performance criteria		
(c) Examining rent delinquency, vacancy loss, maintenance backlog		
(d) Assessing whether actions have met stated goals		
(e) Examining overtime and turn-over rates, community cleanliness		

7. *List four essential elements of a career ladder:*

- (a) _____
- (b) _____
- (c) _____
- (d) _____

8. *Below are seven steps in adapting a model career ladder to an existing career structure. Place them in the correct order.*

- (a) Identify gaps in the existing career structure and propose new positions to fill them.
- (b) Estimate annual cost of making proposed transfers and promotions.
- (c) Prior to training, determine costs of promotions resulting from its successful completion.
- (d) Plot every existing position at the closest approximate model grade.
- (e) Identify employees who without additional training would qualify for a promotion or be transferred to a new job title.
- (f) Identify the official procedure required to establish new positions within the agency.
- (g) Identify the number of persons currently employed in each position.

Correct order:

_____, _____, _____, _____, _____, _____, _____.

9. *List three options that will encourage staff to participate in training:*

- (a) _____
- (b) _____
- (c) _____

10. Below are several causal, intervening, and output variables in organizational performance. Place a check in the column which indicates the category the variables belong to.

	Causal	Intervening	Output
(a) Management style			
(b) Behavior			
(c) Management Strategies			
(d) Productivity			
(e) Perceptions			
(f) Motivational Forces			
(g) Costs			
(h) Organizational Structure			
(i) Union Relations			
(j) Expectations			
(k) Role Concepts			
(l) Turn-over			
(m) Organizational Objectives			
(n) Crime Rates			
(o) Attitudes			
(p) Occupancy Rates			
(q) Technology			
(r) Workgroup Tradition			
(s) Vandalism Rates			
(t) Values and Goals			

11. *List four examples of organizational supports for a career system:*

(a) _____

(b) _____

(c) _____

(d) _____

SKILL-TEST

SKILL-TEST: CAN YOU USE WHAT YOU HAVE LEARNED IN WORK SITUATIONS?

1. The manager of a hypothetical housing development wants to develop a career system for his social service staff. He already has job analyses for all social service positions and a standardized performance-based evaluation mechanism.

What other steps does he need to take?

- (a) _____
- (b) _____
- (c) _____

2. In setting up such a career system for social service staff, the manager has made the following provisions:

- (a) He has increased starting salaries to make them competitive with those for social service trainees in public welfare agencies.
- (b) He has begun a comprehensive training program aimed at improving job performance.
- (c) He has established parallel career ladders for paraprofessionals as well as professionals.
- (d) He has made relevant training available on all job levels.
- (e) He has provided easy access to the career ladder and to training programs for all employees.
- (f) He has taken clear responsibility for all training programs.
- (g) He has incorporated all new jobs into the agency structure.

Make three suggestions for improving this career system:

- (a) _____

- (b) _____

- (c) _____

3. *Below is an abbreviated job analysis for a hypothetical position. Read it and make two suggestions for improving it.*

Title of Job: Management Aide I

Job Summary

The Management Aide I maintains individual and group contacts with residents relating to management and resident relations. Therefore, the management aide identifies problems of individuals and groups and refers the situations to an appropriate social service program. The Management Aide I informs residents of their rights and responsibilities, identifies and reports maintenance difficulties and assists in the development of programs.

Duties and Tasks of the Management Aide I

- Duty 1. Receives notice of move-in date and plans to visit resident promptly after move in.
- Tasks 1a. Visit resident.
1b. Establish rapport with resident.
1c. Prepare a schedule of visits to suggest techniques and the use and care of home equipment.
1d. Provide information about budget planning and consumer education.
1e. Recommend social or other agency contacts when indicated.
- Duty 2. Schedules and interviews residents in the office as requested by residents or management.
- Tasks 2a. Gather all pertinent information from residents.
2b. Fill in schedule appropriately.
2c. Determine if any problems exist.
2d. Present the problems, if any, to the immediate supervisor.
2e. Investigate the outcome periodically.

Skill and Knowledge Requirements

1. Ability to meet and get along with people. The resident must be interviewed in a supportive manner in order to:
 - a. Gain knowledge of what residents perceive their needs to be in order to report that data to resident councils and management.
 - b. Set the groundwork for organizing residents for participation in community programs.
2. Basic reading and writing skills for reporting.
3. Ability to identify individual, group and physical maintenance problems by distinguishing symptoms from sources of problems and to identify the priority of need.
4. Ability to provide information and to understand and communicate the principles of budget planning to consumer.
5. Understanding of the organization, structure, and purpose of the Public Housing Authority and knowing how to communicate this knowledge.

Proficiency Evaluation

1. Performance of the Management Aide I is assessed on an ongoing basis by the immediate supervisor, the Management Trainee. Input is received when the aide presents the trainee with daily and monthly reports and from all additional contacts he has with the aide.
2. Periodic assessment is made through communication with the housing manager and the social services supervisor. Assessment is achieved through comments of satisfaction or dissatisfaction from the residents, resident councils, social service agencies and from an additional source with which the aide communicated.

Qualifications

Requirements for entrance and advancement within the position in terms of experience, attitudes, skills or any special qualifications.

1. Residents of public housing will be given preference.
2. Previous experience in assisting individuals in problem solving situations.
3. Work or volunteer activity in human services is desirable.
4. Employment as homemaker is preferable.
5. Respect for individual resident rights.

Identify two (2) missing elements:

(a) _____

(b) _____

4. For each part of a job description listed vertically, place a check under the organizational need or needs it helps to meet.

						A standard basis for developing a performance evaluation mechanism
						A clear description of how the job title fits into the total organization
						Standard criteria for hiring or promotion
						A detailed description of the duties and tasks each position is responsible for
						A detailed description of knowledge and skills required for effective job performance
Lines of Authority						
Lines of Communication						
Duties and Tasks						
Skill and Knowledge Requirements						
Qualifications						

5-6. Read the following report of a hypothetical worker's job performance.

1. Mr. Green is a highly skilled craftsman and has been working for the housing authority for the past year. In that time, his work performance and work habits have been well above average. The maintenance supervisor has told you that Mr. Green likes his work but doesn't care much for the residents.
2. The maintenance supervisor sent him to you because several residents have complained recently about comments he has made to them. In particular, he told one what he thought of her housekeeping ability. He told her that he thought that residents were a pain-in-the-neck to him and that he wonders why others put up with them as much as they do.
3. Before the project manager even begins to speak to Mr. Green, he states that as far as he's concerned residents are not much better than animals and that while he's going to do this job well, he's going to be sure that residents understand that they have to do a better job too.
4. You know that this is a better paying position than Mr. Green has had in the past and that he likes the freedom in the work situation as well as the convenience of the location to his home.
5. He has been earning a living for himself since he was eighteen years old and he has never been out of a job for more than two days at a time. His skills have always been saleable and he has gotten along fine on his own ability. He has never been able to afford a really fine home, but he's always been able to live in a clean, neat, well-maintained dwelling. He knows enough about public housing to know that the residents are subsidized and that some of the subsidy money comes from the taxes he pays. He finds it difficult to understand why residents cannot take better care of their dwelling units than they do and he believes that most or all of the residents are lazy and just looking for welfare handouts. He has always been an outspoken man. He likes his job, but he knows very well that if it doesn't last he can find another one. Moreover, he knows he is the most valuable maintenance man on staff.

(a) Make three (3) suggestions for evaluating Mr. Green according to performance-based criteria.

- (1) _____
- (2) _____
- (3) _____

(b) *Make three (3) suggestions for evaluating Mr. Green according to management-by-objectives criteria.*

(1) _____

(2) _____

(3) _____

7. *Assemble the following nine (9) positions into a workable career ladder. Include at least three (3) entry points.*

Social Worker III	Requires an MSW or three years of supervisory experience in social service work.
Social Service Aide I	Requires a high school diploma.
Assistant Director of Social Service	Requires an MSW plus five years of experience or seven years of experience in social service.
Assistant Social Worker	Requires a BSW or five years of experience in social service work.
Social Service Aide II	Requires a high school diploma, plus one year of experience in social service work.
Social Worker I	Requires a BSW plus one year of experience in social service work or six years of experience in social service work.
Director of Social Service	Requires an MSW plus ten years of experience or fifteen years of supervisory experience in social service.
Social Worker Trainee	Requires a high school diploma, plus two years of experience in social service work.
Social Worker II	A supervisory position. Requires a BSW plus three years of experience in social service work or ten years of experience in social service work.

8. *In adapting the model career ladder to develop a career ladder for social service personnel, a hypothetical manager followed the process outlined below:*

- (a) He plotted all existing social service positions at the career ladder grade which most closely approximates the requirements and responsibilities of the grades in the model;
- (b) He identified the number of persons currently employed in each position;
- (c) He identified gaps in the existing career structure and proposed new positions to fill them;
- (d) He identified the employees who without additional training would qualify for either a promotion or transfer to a new job title; and
- (e) He identified the official procedure required to establish new positions within the agency.

What steps did he omit?

9(a). *Indicate what type of training modality the following personnel situations require:*

SITUATION	Orientation-type training	On-the-job training by supervisors	Off-the-job training by consultants
(1) Maintenance staff need to learn how to repair the new models of kitchen appliances			
(2) Social service staff need extensive training in counseling skills			
(3) The budget clerk does not know how to apply for vacation leave			
(4) A security guard does not know how to apply for vacation leave			
(5) Social service staff need sensitivity training because of poor attitudes towards residents			
(6) All security staff need sensitivity training because of poor attitudes towards residents			
(7) Clerical staff are having trouble changing ribbons on the new typewriters			
(8) A maintenance man has been using the electric waxer incorrectly			
(9) Social service staff are unaware of community resources available to residents			
(10) Security staff need licensing by the state authority			

(b) *Suggest appropriate training resources for the following personnel situations:*

SITUATION	RESOURCE
(1) Maintenance staff need to learn how to repair the new models of kitchen appliances.	<hr/>
(2) Social service staff need extensive training in counseling skills.	<hr/>
(3) The budget clerk does not know how to run the adding machine.	<hr/>
(4) A security guard does not know how to apply for vacation leave.	<hr/>
(5) Social service staff need to learn how to complete the new referral forms.	<hr/>
(6) All security staff need sensitivity training because of poor attitudes towards residents.	<hr/>
(7) Clerical staff are having trouble changing ribbons on the new typewriters.	<hr/>
(8) A maintenance man has been using the electric waxer incorrectly.	<hr/>
(9) Social service staff are unaware of community resources available to residents.	<hr/>
(10) Security staff need licensing by the state authority.	<hr/>

10. Examine the following case problems. Identify the causal, intervening, and output variables in each.

(a) Two more maintenance workers quit their jobs last week. They complained that their positions were dead-end jobs. The director of maintenance was not too concerned; such workers are easy to recruit.

- Causal variables: _____

- Intervening variables: _____

- Output variables: _____

(b) Management has been in the process of upgrading the position of social service aide. The program involves stressing professionalism both in the office and in working with residents. Results have been mixed: Productivity has increased, yet workers are asking for more money and career advancement opportunities.

- Causal variables: _____

- Intervening variables: _____

- Output variables: _____

(c) Management wants to reduce incidents of crime and vandalism within a target development by fifty percent. Accordingly, it has provided all guards with walkie-talkies. Guards are now more successful in apprehending criminals, yet rates of crime and vandalism seem to be increasing.

- Causal variables: _____

- Intervening variables: _____

- Output variables: _____

11. *Read the following case study:*

The Housing Authority has begun a pilot program with six housing developments to implement in-service training programs, career ladders, vocational counseling, and credentialing programs. The strategy for meeting this objective was to work both individually and collectively with the following developments:

- (a) Northside Manor
- (b) Southwark Plaza
- (c) East Village Homes
- (d) West Village Homes
- (e) Northwest Heights
- (f) Southwest Heights

The activities of the project were structured in a series of phases, moving from a specific development focus to the utilization of the individual experience for the development of models that could be used by a wide variety of human service providers. Most of the activities took place both at the specific developments and within the central office.

Planning - This phase included the negotiations with each development concerning participation, communications, the process for organizing a project team, a delineation of responsibilities, and an analyses of existing job analyses, training programs, and advancement opportunities.

Development of Career Ladders - To facilitate more efficient use of personnel, each development examined its existing career opportunities and job responsibilities. Job descriptions which underutilized personnel were upgraded and criteria for the performance of each job level were defined. Where clear paths for mobility did not exist, a competency-based career ladder system was designed.

Identification of In-Service Training Needs - Job analyses were the major tool for assessing training needs for various positions; such needs in turn determined the content of the curriculum.

Implementation of In-Service Training - Training was conducted at each development. Approximately 100 individuals took part in these initial offerings of on-going training programs.

Make four (4) suggestions for improving organizational supports for this hypothetical career system:

(a) _____

(b) _____

(c) _____

(d) _____
