

U.S. Department of Housing and Urban Development
Office of Policy Development and Research

ORIGINAL



Personnel Administration in Housing Management

Participant's Workbook



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Personnel Administration in Housing Management

Participant's Workbook |
February, 1979 |

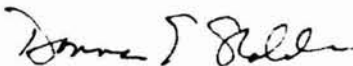
The research forming the basis for this workshop was conducted pursuant to grants between the U. S. Department of Housing and Urban Development and the five universities listed on the page of acknowledgments. Statements and information contained in this workshop are those of the grantees who assume sole responsibility for their accuracy and completeness.

FOREWORD

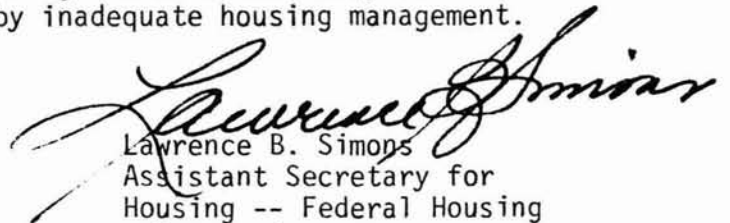
This workbook is one of eighteen in a housing-management curriculum developed by HUD in conjunction with Temple University. It is not easy. The workshops, for which this and the other workbooks are texts, will not be what we used to call Mickey Mouse sessions. And that, of course, is all to the good. 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.



Donna E. Shalala
Assistant Secretary for
Policy Development and Research



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Assistant Secretary for
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Commissioner

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

The five universities listed below worked together to develop a college level curriculum for housing management. The fifteen modularized workshops were developed and compiled by the Center for Social Policy and Community Development at Temple University using specific elements of the college curriculum.

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INTRODUCTION

The success or failure of management depends largely on the proper administration of staff. This workshop strives to prepare you to be better able to undertake a variety of personnel functions. Accordingly, it has five overall objectives:

- (1) To familiarize you with the elements of personnel planning and policy,
- (2) To familiarize you with the elements of personnel recruitment and selection,
- (3) To familiarize you with the elements of personnel training,
- (4) To familiarize you with preferred methods of assigning and scheduling work, and
- (5) To familiarize you with preferred methods of handling performance evaluations and other personnel actions.

Each goal has several learning objectives. These 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 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 two half-day sessions.

Session 1 - Goal Areas 1 and 2
Session 2 - Goal Areas 3, 4, and 5

GOAL AREA 1:

TO FAMILIARIZE YOU WITH THE ELEMENTS
OF PERSONNEL PLANNING AND POLICY

GOAL AREA 1: TO FAMILIARIZE YOU WITH THE ELEMENTS OF PERSONNEL PLANNING AND POLICY

LEARNING OBJECTIVES

1. You will list four (4) major areas of personnel policy.
2. You will describe eight (8) laws which affect the development of personnel policies.

ANTICIPATED PRACTICE OUTCOMES

1. You will examine a case study and make four (4) suggestions for improving a personnel policy.
2. You will examine case studies and determine if the provisions of eight (8) laws affecting personnel policies are adhered to.

Content

Personnel Planning and Policy

Personnel planning involves the continuous process of setting personnel policies. Such policies regulate the number and kinds of employees needed to run a particular housing development, determine their job duties, assess their compensation and fringe benefits, and establish procedures for recruiting, hiring, administering, and evaluating them. Although policy planning usually takes place within executive management, housing managers are directly involved in implementing personnel policies within their own developments.

Personnel policies define the rights and the responsibilities of employees and of workers. Most authorities have a personnel manual which describes personnel policy as reflected in:

- (1) The housing authority's purpose and administrative structure;
- (2) The number and kinds of staff needed for particular developments;
- (3) Selection criteria, job descriptions, and performance standards for all positions;
- (4) Guidelines for personnel actions, such as promotions, transfers, and terminations; and

- (5) Descriptions of compensation and benefit policies such as salaries, wages, time off, fringe benefits, and employee growth payments.

A clear expression of personnel policies in a manual insures that the manager gives equal treatment to all employees and that he does not overlook legal or agency requirements for personnel actions. Similarly, a personnel manual can help employees take advantage of opportunities for growth and protect them from discriminatory or arbitrary treatment by the employer.

The following chart describes the principal laws that affect the development of personnel policies in housing authorities.

LAW/REGULATION	APPLICABILITY	PROVISIONS
1. Walsh-Healey Fair Labor Standards	Owner or Management firm grossing over \$250,000 per year.	Must pay employees at least \$2.30 per hour. Must pay at least time and a half for each hour over 40 hours per week.
2. National Labor Relations Act, as amended	Any development grossing over \$500,000 per year.	Unlawful to discriminate against employee for union activity. Unlawful to influence employee voting to determine what union, if any, will represent employees. Unlawful to interfere in union affairs. Unlawful to refuse to bargain with a union which represents a majority of employees.
3. Federal Insurance Contributions Act (Social Security)	Any employer who pays wages to an employee in excess of \$50 in any one quarter.	Employer must withhold a certain percentage of employee wages. Employer contributes equal amount. Employer must have employee identification number. Employer must file quarterly return on IRS Form 941.

LAW/REGULATION	APPLICABILITY	PROVISIONS
4. Federal Unemployment Tax	Any employer who has four or more employees in a calendar year	<p>Must pay a Federal Unemployment Tax to Internal Revenue Service.</p> <p>Amount of tax depends on employer's history of stability of employment and state unemployment tax.</p> <p>If tax liability exceeds \$100 for any quarter, make deposits quarterly.</p>
5. Internal Revenue Code (Federal Income Tax)	Any employer	<p>Various requirements, including withholding taxes from employee paychecks and filing W-2 forms. Every employer should obtain a copy of Circular E, <u>Employer's Tax Guide</u>, which is available from the Internal Revenue Service.</p>
6. Title VII of the Civil Rights Act of 1964 (Equal Employment Opportunity)	Employers with 15 or more employees	<p>Unlawful for an employer to do any of the following because of race, color, sex or national origin:</p> <ul style="list-style-type: none">-Fail or refuse to hire-Discharge-Discriminate with respect to compensation, terms and conditions, and privileges of employment.-Limit, segregate, or classify employees or job applicants in any way that would deprive individual of employment opportunities.
7. Occupational Safety and Health Act of 1970	Employers with one or more employees	<p>Employers must comply with job safety and health standards issued by the U. S. Department of Labor.</p>

LAW/REGULATION	APPLICABILITY	PROVISIONS
8. Age Discrimination Act of 1967	Employers with 25 or more employees	Prohibits arbitrary age discrimination for individuals the ages of 40 and 65 in: -Hiring -Discharges -Promotions -Other personnel actions
9. Equal Pay Act of 1963	All employers covered by the Fair Labor Standards Act	Bans any differential in pay based on sex.
10. Rehabilitation Act of 1975	Any employer	Prohibits discrimination due to a handicap unless it can be shown that the individual cannot perform the job.
11. State and Local Laws	Vary-- check the laws applying in your jurisdiction	Wage and hour provisions Working conditions Disability laws Income taxes Equal employment Civil Service Merit Systems Other specific provisions

GOAL AREA 2:

TO FAMILIARIZE YOU WITH THE ELEMENTS OF
PERSONNEL RECRUITMENT AND SELECTION

GOAL AREA 2: TO FAMILIARIZE YOU WITH THE ELEMENTS OF PERSONNEL
RECRUITMENT AND SELECTION

LEARNING OBJECTIVES

1. You will suggest five (5) sources for recruiting personnel.
2. You will name ten (10) items that should be included in application forms.
3. You will describe four (4) kinds of tests commonly used for employment screening.
4. You will cite five (5) guidelines for conducting a job interview.
5. You will describe two (2) laws which affect personnel recruitment and selection.

ANTICIPATED PRACTICE OUTCOMES

1. You will suggest appropriate recruiting sources for ten staff positions.
2. You will examine a sample job application and make five (5) suggestions for improving it.
3. You will examine five (5) hypothetical test items to determine their legality according to criteria provided.
4. You will examine a case study and select the appropriate candidate for a position according to criteria provided.
5. You will examine a case study and determine if the provisions of two (2) laws affecting personnel recruitment and selection are adhered to.

Content

Personnel Recruitment and Selection

Below are the principal sources from which a manager can recruit qualified personnel:

1. Schools and Training Programs

- Vocational and Trade Schools.

These are good sources for recruiting maintenance and clerical staff.

- High schools, business colleges, community colleges, and four-year universities (preferably with a curriculum in housing management or a related field).

These are good sources for management personnel.

- Special training program graduates, such as in housing management or a related field.

Probably the best source for both management and maintenance personnel.

2. Employment Agencies

- State Employment Systems
- Local and Private Employment Agencies

3. Advertising

- Advertisements in newspapers and in professional trade journals.
- Bulletin board announcements in local, State, or Federal civil service offices.
- Radio and television employment commercials.
- Help-wanted signs or brochures in the management office.

4. Personal Sources

- Contacts with leaders of local groups, such as churches, social agencies and clubs.
- Announcements to residents to see if a qualified resident wishes to apply.
- Recommendations and referrals from present employees.

5. Other Sources

- Previous employment applications.
- Announcements to present employees to encourage in-house applications.

Promotions from within the organization are an excellent way of building staff morale.

- Lists of qualified former employees who have been laid off or who, for some reason, have voluntarily left the management organization.

Job Applications

An indispensable part of recruiting and selecting employees is to have applicants complete a job application form. Job applications should be well-designed, with clear and simple instructions.

Most job application forms request the following information:

- Name, address and telephone number
- Date and place of birth
- Marital status
- Number of children or dependents
- Health status, height and weight
- Type of work desired
- Years of education and schools attended
- Other special schooling or training
- Previous jobs held/beginning and ending pay
- Reason for leaving previous jobs
- References

A well-developed application form has the following advantages:

- It is a simple test of an applicant's ability to spell and write and to answer factual questions.
- It provides the manager with valuable information before the employment interview.
- It gives applicants assurance that their qualifications are on record.

After an application is completed, the manager should investigate the applicant's previous work history. He should double-check the facts listed on the application and discuss the applicant's character and performance with previous supervisors. Valuable information can also be obtained by checking with officials of schools the applicant attended and by talking with people listed on the application as references. These contacts can provide helpful insights into the applicant's behavior and performance in a variety of situations.

Testing

Before they actually interview a prospective employee, many managers have applicants take one or more tests to measure what they can do, their ability to learn, or their attitudes and ability to get along with other people.

Tests used to select employees should measure only those skills, abilities, and attitudes that are required to do the job. Courts have ruled that tests that are not directly job-related violate equal employment laws if they discriminate against minorities or women. The use of the following kinds of tests for selection purposes has been successfully challenged in job discrimination cases:

General performance tests: tests to measure what a person can actually do beyond what is required by the job.

Aptitude tests: tests to measure a person's ability to learn and general ability beyond what the job requires.

Temperment and personality tests: tests to measure a person's attitude and ability to get along with other people.

There are other reasons for avoiding tests that are not job-related. Relying on a test that measures skills not required by the job can also result in:

- over-qualified workers, or
- unqualified or under-qualified workers who are simply skillful test takers.

A manager who uses tests should remember that test results are not guarantees of performance. They can be misleading if the tests are not administered correctly or if the scores are misinterpreted.

Job descriptions should be used to determine what to test for in filling a particular position.

Job descriptions provide a clear description of both:

- What the worker does, expressed as explicit action verbs; and,
- What gets done, expressed as reasons for the action.

Examples of these two elements are seen in the following chart:

INFORMATION	HOW EXPRESSED	EXAMPLES
What the worker does; actions and behavior	Explicit action verbs	<u>Talks</u> <u>Types</u> letters <u>Reads</u> and <u>reviews</u> reports <u>Digs</u> holes <u>Sweeps</u> floors <u>Turns</u> handles <u>Pulls</u> levers
What gets done: results	A reason for the worker's actions: why he does it	<u>Talks with residents to work out agreement</u> <u>Types to complete report</u> <u>Digs hole to plant bush</u> <u>Sweeps to clear floor</u> <u>Turns handle to start machine</u> <u>Pulls lever to open vent</u>

An alternative to written tests, and one which reflects actual job descriptions and performance standards, is to assign a task giving instructions and to observe and monitor the applicant's performance. Unfortunately such tests, by their nature, cannot be used to screen applicants before an interview.

Interviewing the Prospective Employee

The job interview is an important part of the recruitment and selection procedure. The manager should review the job requirements prior to the interview so that he or she is thoroughly familiar with them. Success in interviewing a job applicant depends on being well prepared. The following factors are important to a successful interview:

- List all the information concerning the applicant and the job.

- Determine additional information needed for making a decision.
- Make a mental or written list of what is needed to talk about with the applicant.

When Setting Up a Job Interview:

- Arrange an appointment with the applicant. Try to make it as convenient as possible.
- Arrange a suitable setting. The manager should remember that success in interviewing a job applicant depends in part on the interview setting. The following factors are important:
 - privacy and comfort
 - an informal opening
 - establishment of confidentiality
 - freedom from interruptions.

When Conducting a Job Interview:

- Introduce yourself and put the applicant at ease.
- Tell the applicant about the job and obtain the information needed to decide whether the applicant should be hired. (Perhaps by taking notes once some rapport is established with the applicant).
- Conclude the interview comfortably and on schedule. If you decide during the interview that the applicant cannot be accepted, say so tactfully but clearly. If you decide to hire the person, do so. If you are still undecided or are unable to make an immediate commitment, promise to contact the applicant within a specific period of time.

Below are some guidelines to follow in conducting job interviews:

The interviewer must:

- Respect the interests and individuality of the interviewee.
- Pre-establish clearly the objectives to be gained or purposes to be served by the interview.
 - Get and review background information.
 - Plan the interview.
 - Determine what is important.
 - Structure information to be determined.
- Make the interviewee feel at ease.
- Encourage and allow the interviewee to talk freely.
- Refrain from making too many comments until the applicant has had sufficient opportunity to express himself.
- Select physical conditions that are suitable.
 - Privacy and comfort
 - Quiet
- Establish and maintain confidentiality.
- Minimize interruptions.
- Listen and be attentive. Ask fact-finding questions. Be alert and flexible.

The following chart summarizes laws affecting personnel recruitment and selection:

LAW/REGULATION	APPLICABLE TO	PROVISIONS
Title VII of the Civil Rights Act of 1963 (Equal Employment Opportunity)	Employers with 15 or more employees	<p>Makes it unlawful for an employer to do any of the following because of race, color, religion, sex or national origin:</p> <ul style="list-style-type: none"> -Fail or refuse to hire -Discharge -Discriminate with respect to compensation, terms and conditions, and privileges of employment. -Limit, segregate or classify employees or job applicants in any way that would deprive an individual of employment opportunities.
Age Discrimination in Employment Act of 1967	Employers with 25 or more employees	<p>Prohibits arbitrary age discrimination in:</p> <ul style="list-style-type: none"> - Hiring - Discharges - Promotions - Other personnel actions
Many State and Local Laws	Vary -- check particular laws applying in your jurisdiction	<p>Equal Employment State and Civil Service and Merit Systems</p>

GOAL AREA 3:

TO FAMILIARIZE YOU WITH THE
ELEMENTS OF PERSONNEL TRAINING

GOAL AREA 3: TO FAMILIARIZE YOU WITH THE ELEMENTS OF PERSONNEL TRAINING

<u>LEARNING OBJECTIVES</u>	<u>ANTICIPATED PRACTICE OUTCOMES</u>
1. You will name and describe three (3) types of training.	1. You will examine ten (10) case study problems and suggest appropriate kinds of training for each.
2. You will suggest ten (10) potential training resources.	2. You will examine ten (10) case study examples and suggest appropriate resources for each.
3. You will suggest five (5) criteria for evaluating training results.	3. You will examine five (5) case study evaluations of training and make suggestions for their improvement.

Content

Personnel Training

Every new employee needs to be introduced to the new job environment and taught how to perform specific tasks, regardless of previous training, education or experience. Specific occasions for retraining also come about when an employee is transferred or promoted or when a job changes because of a new method of handling work.

New employees are often trained inadequately. The new employee is told to work with little or no break-in period and is left to learn the job without adequate assistance. Moreover, he or she is often not adequately briefed about the policies, ideals and objectives of the organization.

The manager should have a well-planned personnel training program, which reflects an operating procedures manual. Such a manual should provide written instructions for every job category, and outline certain specific points such as: general conditions of employment and hours of work, holidays, sick leave and vacation policies, organizational policies with respect to

public relations, employee attitudes, and prospects for advancement. Most important of all, such a manual should contain a complete discussion of the particular job: how it is done, its meaning, and its importance.

Conducting training for newly appointed employees is a good personnel policy. In this way, employees can be quickly prepared for their jobs; employees who have transferred or have been promoted are provided the opportunity to learn their new work as quickly as possible; and accidents, incorrect work, and other costly mistakes can be reduced. On-going training can help staff adapt to new work situations and to major changes in job-content or work relationships, reduce work dissatisfaction, and can improve skills and knowledge necessary to perform the job.

Determining Training Needs

Training should be used to solve work-related problems only after the supervisor has tried improving and clarifying instructions, work assignments, or performance standards. In identifying training needs, the supervisor should look for:

- (1) The same or similar problems experienced by several workers,
- (2) The same or similar problems experienced by one worker,
- (3) Recurring misinterpretation of work instructions, or
- (4) Recurring inability to meet performance standards.

Once needs are identified, the supervisor should determine which skills, if improved, would prevent the problem from recurring.

Types of Personnel Training

- (1) "Vestibule" Training

Vestibule training is the orientation given to employees

before they begin to do a job, either upon hiring, promotion, or transfer. It should:

- Introduce the worker to his or her co-workers.
- Familiarize the worker with the tasks and procedures of the job.
- Explain how and where the job fits into the organization's structure.
- Enable the worker to obtain the needed materials and supplies.
- Establish a working relationship between the employee and the manager.

Vestibule training can be either formal or informal, presented individually or to a group. Formal vestibule training is usually accompanied by informal training at the work site.

(2) On-the-Job Training

On-the-job training is given to employees directly on the job. It should be structured so that employees:

- Clearly understand the reasons why it is being held and how it is connected with their work, and
- Can recognize potential pay-off from actively participating in the training.

(3) Off-the-Job Training

When on-the-job training is inappropriate either because of the length or nature of the material to be presented or because insufficient resources exist in-house to do an adequate job, off-the-job (classroom) training may be desirable. It can be given by other employees, by outside trainers under contract, or by groups or institutions in the community.

Training Resources

Below are potential resources to supplement on-the-job training or to conduct off-the-job training:

- In the community -- in schools, industry, business, or other agencies and institutions, such as:
 - business machine dealers
 - social service agencies
 - adult or continuing education programs
 - special training institutes
 - professional or trade associations
 - manufacturers, and
 - volunteer groups.
- In your organization -- from such sources as:
 - policy or procedural manuals
 - personnel training specialists on the staff
 - other staff members
 - managers in other developments, and
 - your supervisors or other central office staff who are familiar with the work.

Planning Training

Once training needs and resources are identified, the supervisor should clearly identify staff capabilities and limitations, anticipated results, training costs, and time available for training.

Conducting Training

- *Do check and double-check the facilities, equipment, materials and supplies to make sure you have everything you need.*

- Do tell the employees well in advance what they will be doing, when, how and why.
- Do remind them regularly of times and places. If someone other than the manager is doing the training, make sure both have all the information needed to conduct the session and evaluate the results.
- Do follow the training plan carefully. Record any necessary changes made in the plan during delivery and the reasons they were made.
- Do not have to interrupt or delay the session because rooms, materials, or resources were not there. Delays and interruptions destroy interest and interfere with learning.
- Do not spring the training on staff without warning. Most people learn better and more easily if they know why and for what they are being trained.
- Do not get so far off the training plan that it is not known what to evaluate when finished.
- Do not be inflexible. Be prepared to allow trainees to spend more time on some things and less on others even if it involves changing plans.

Evaluating Training

To evaluate the results of training, the manager must know:

- What the training is intended to do (training objectives);
- What resources were used (how much time, money, manpower, facilities and equipment);
- What the training actually accomplished (results).

The process of evaluation consists of comparing actual results to objectives and resources to find out:

- How close actual results came to meeting objectives; and
- How close actual resources used relate to planned uses.

By evaluating how close actual results came to meeting objectives, the supervisor will determine if the training was goal-effective, that is, why

it provided employees with needed skills and knowledge. The supervisor should also check periodically over several months to see whether trainees have retained what they learned.

By evaluating how close actual resources used relate to planned uses, the supervisor can determine if training was cost-effective. Some considerations: does it cost more to train workers to do their work better than it would to repair their mistakes? Does it cost more to train workers than to hire more qualified workers? Managers should weigh all the costs of training against anticipated benefits.

Considerations in Evaluation

- Does it save time?
 - for the manager?
 - for the staff?
 - for the management organization?
- Does it save money?
 - in decreased operating costs?
 - in overtime pay?
 - by decreasing accidents?
 - by decreasing employee or resident turnover?
 - by making it unnecessary to hire more staff or subcontract?
- Does it save manpower?
 - by increasing the use of skills on-the-job?
 - by helping existing staff learn new work?
 - by increasing morale through providing improved career opportunities?

Methodology

1. The material on personnel training should be presented in an informal lecture.

Resource

1. Workshop staff should conduct the informal lecture.

GOAL AREA 4:

TO FAMILIARIZE YOU WITH PREFERRED
METHODS OF ASSIGNING AND SCHEDULING WORK

GOAL AREA 4: TO FAMILIARIZE YOU WITH PREFERRED METHODS OF ASSIGNING AND SCHEDULING WORK

LEARNING OBJECTIVE

ANTICIPATED PRACTICE OUTCOME

1. You will describe the five (5) elements of the process of assigning and scheduling work.

1. You will examine a case study and assign and prioritize ten (10) work tasks.

Content

Assigning and Scheduling Work

To assign and schedule the work of a housing development staff, the manager needs to know:

- Staff capabilities and limitations.
- Licensing or certification requirements for certain kinds of work.
- Laws governing working hours and conditions.
- The amount of work that needs to be done.
- The time, money and materials available to do the work.
- The skills required to do the work.
- The priorities of the organization, development, staff, and residents for getting the work done.

The process of scheduling work and making assignments is basically one of budgeting the time and manpower available to get needed work done. The management organization, the community, the residents and the development's staff all have different needs -- many of which can conflict. The organization may need the manager to spend less money; the residents may need recreation facilities or play equipment for their children; and the staff may need salary increases to keep up with the cost of living. The community may want residents to keep to themselves, while the residents may want to take part in community life.

Determining What Needs Can Be Met

- Determine how much work is available. If you have five employees who each work 40 hours per week, then 200 working hours of staff time are available to do a week's work.
- Examine personnel records, job descriptions, and performance standards to determine what skills are available to get the work done.
- Compare what needs to get done with the time and skills available to do it to determine what and how much of the needed work you can do in the time allowed. Be realistic in your estimates of staff time. Do not expect anyone to work 100 percent of the time. Be careful to account for breaks and other "down time" and to allow time to move from one task to another. Employees will resent and rebel against being treated like machines.

Setting Priorities

Priority work is work that:

- Is most important to the most people.
- Is necessary for other work to get done.

Planning Work Assignments

After work has been scheduled, the manager must decide who will do it by reviewing staff working hours, schedules, and skills to determine who can do the work at the appropriate time and complete it by the deadline.

Neither work scheduling nor assignment planning can take place independently. This process requires a manager to balance time and manpower resources to:

- Make maximum use of time without overloading the staff or forcing employees to rush or do work they are not qualified for.
- Make maximum use of skills without overtaxing staff or assigning so many different kinds of work that employees become confused about methods and procedures or standards.

Scheduling Work

The work schedule should allow management and staff to get the work done efficiently and effectively. The work should progress by building naturally from one task to another. The manager may find it useful to set up a calendar with each day's work described in terms of what is to be done, at what time, and how long each task should take.

Assigning Work

With a work schedule and assignment plan, the manager is ready to put the staff to work. In making assignments:

- Make sure the employees clearly understand both the work they are to do and the time limits for completing it.
- Make the staff aware of the way the work fits together.

Finally, be prepared to deal with the unwillingness of some staff members to do certain kinds of work and the desire of others to do tasks they have not been assigned to. If possible, workers should be given a choice of what work they would like to do.

Work assignments and schedules should meet two criteria. They should be:

- Tight enough to make sure the work gets done (productivity considerations).
- Flexible enough to allow employees an opportunity to learn new skills (career growth considerations).

GOAL AREA 5:

TO FAMILIARIZE YOU WITH PREFERRED METHODS
FOR HANDLING PERFORMANCE EVALUATIONS AND
OTHER PERSONNEL ACTIONS

GOAL AREA 5: TO FAMILIARIZE YOU WITH PREFERRED METHODS FOR HANDLING
PERFORMANCE EVALUATIONS AND OTHER PERSONNEL ACTIONS

LEARNING OBJECTIVES

1. You will name and describe three (3) criteria for performance evaluations.
2. You will name and describe three (3) major types of personnel action.

ANTICIPATED PRACTICE OUTCOMES

1. You will make a performance evaluation of a hypothetical employee utilizing three (3) appropriate criteria.
2. You will examine a case study example and recommend the appropriate personnel action to take.

Content

Performance Standards

Performance standards should meet two criteria:

- They should be usable. They should not interfere with the work or cost too much to apply.
- They should be reasonable. They should measure something that is really important and not hold the worker accountable for something he cannot control.

Examples of typical and acceptable performance standards are seen in the chart on the following page.

TYPICAL ACCEPTABLE PERFORMANCE STANDARDS

WHAT IS TO BE MEASURED?	WHAT DO YOU NEED TO KNOW?
actions	<ul style="list-style-type: none">- how many are to be taken (writes all entries in ledger)- what kinds are needed (writes entries accurately)- how often, or in how much time (by 5 p.m. each day)
results	<ul style="list-style-type: none">- how many are to be produced (four inspections)- what kinds are needed (<u>thorough</u> inspections)- how often or in how much time (by end of month)
errors	<ul style="list-style-type: none">- how many are allowable (ten errors)- what kinds are allowable and what kinds are not (typing errors; no spelling errors)- how often can errors be allowable (every 200 words typed). (This can be expressed as a percentage of error or as a number of errors per a number of actions or results; types 50 words per minute with 90 percent accuracy; fewer than two typing errors per page).

Evaluating Work Performance

A manager can evaluate a worker's performance by:

- spot-checking the work,
- watching the worker perform,
- tracking work flow problems, or
- reviewing complaints from residents or co-workers.

In evaluating a worker's job performance, the manager should be careful:

- not to interfere with or interrupt the work process.
- to be attentive and observant.
- to be objective and fair in applying standards.

Promotions and Transfers

Promotions generally take place:

- According to a schedule or length of service.
- As a result of outstanding performance on the present job.
- As a result of other personnel actions which have left a vacancy higher in the organization for which the employee is qualified.

Transfers (moves from one field of work or department to another without necessarily moving upward in the structure) can take place:

- When an employee becomes unable to do his or her present job, but can do other kinds of work the organization needs.
- When an employee is being trained in several kinds of work to eventually qualify for a promotion.
- When there is a personal conflict with supervisors or co-workers and the employee is qualified for a position working with different people.
- When an employee with ability shows an interest in another job.

To decide whether to promote or transfer an employee, the manager will need to know:

- The employee's capabilities, training, education and experience.
- How well the employee is performing his or her present job.
- The performance standards and selection criteria for the job for which the employee is being considered.
- Whether the employee wants the promotion or transfer.

Before promoting or transferring an employee, the manager should consider the following questions:

- Can the organization afford it?
 - Does it have the money to pay this employee more?
 - Can it find someone to do his present work?
 - Does it have the time and money to train him for his new job and train someone else to do his present one?
- How will it affect the operation?
 - Will work get done satisfactorily while the change is being made?
 - How will the rest of the staff feel about it? Will it cause morale problems? Or will it encourage them to try harder?
 - How will new supervisors feel about it? Will they be able to relate to and work with this employee in the new job?
 - How will the employee feel about it? Will he like the work? The new people? How might he react to the change? How will it affect his relationships with other people? How difficult will it be to make the change?
 - How will his new supervisor feel about him? His new co-workers? How will he feel about them?
 - How will the residents feel about it? How will they react to a new person in this employee's present job?

- Can the employee do the new job?
 - Does the employee meet the requirements of the new job?
 - How much training will he need before he can really do it?

In making decisions, the manager has a responsibility to:

- Be objective, fair and unbiased.
- Be fully informed of the potential impact of the situation.
- Follow the procedures established for such actions.
- Explain the action and reasons for taking it to the employee, to the transferee's present co-workers, to the new staff that the transferee will be working with, and to residents.

Some transfers will move the employee into a lower level job. This is a difficult step, but is certainly better for the worker than termination.

Downward transfers can be effective when:

- The worker becomes unable to do the present job because of illness, injury, or other reasons, and there is no suitable place for him at the same or a higher level.
- A law or policy imposes a new licensing, certification or training requirement for a job, and the employee who holds that position, though a valuable worker, is unable or unwilling to qualify.
- An employee is a discipline problem (is late to work, refuses to carry out assignments, is rude to residents, has a drinking problem). The manager's responsibility in these cases is to document the behavior thoroughly and accurately, and try to work out a solution with the employee. People sometimes react well to being moved to a position with less responsibility, or to one which they feel better able to do.

Termination

Firing an employee is a serious action. Before taking it, make sure that:

- (1) You need to do it, and
- (2) You have a good reason ("just cause") to do it.

Don't fire anyone without supporting evidence (such as time sheets or records of poor work). In addition, it can be illegal to fire someone for reasons included below.

ILLEGAL REASONS FOR TERMINATIONS

CAUSE	APPLICABLE LAW
Race, color, religion, sex, national origin and age	Several federal laws, such as Title VII of the Civil Rights Act of 1964, and many state laws prohibit such actions. Personnel actions against your employees for union activity may violate the National Labor Relations Act. Some states also have laws making anti-union discharge illegal. Consult your attorney.

LEGAL REASONS FOR TERMINATIONS

CAUSE	APPLICABLE LAW
Illegal Activity	Theft from development; misuse of funds or equipment; theft from residents.
Inadequate job	Poor quality of work, too slow in completing job assignments; failure to follow instructions.
Unreliability	Failure to show up for work; consistently late for work.
Uncooperativeness	Failure to get along with supervisor, fellow workers, or residents.

If a manager has "just cause" for discharging an employee, the next step is to figure whether he really needs to do it. Sometimes a less drastic action can solve the problem. To decide this, the manager will have to spend some time finding out why the problem has occurred.

- Is it a personality problem or a work problem? Maybe a different job or supervisor would solve the problem.
- Has it been going on for a long time, or did it crop up suddenly to mark an otherwise good work history?
- Has the job, and not the employee, changed? Could training solve the problem?
- Is it really the employee's problem? Is the manager supervising adequately? Are his instructions clear? Has he tried to help the employee improve?
- Can the organization afford the time and money it will take to solve the problem? Is it worth it? Would solving the problem cost more than firing the employee and finding someone else to do the work?

If the manager has a real need and just cause for discharging an employee, he should do the following:

- Document the cause. He may have to prove he has a good reason for the action.
- Notify the employee in writing.
- Before taking action, lay out the reasons, the consequences, and anything the employee can do to avoid being terminated.
- At the time termination procedures are instituted, state the reasons for the action again and the procedures that will be followed.
- When a termination date has been set, the dismissal notice should state again why the employee has been fired and when his last work-day will be.
- Follow procedures carefully and thoroughly. This will protect the manager as well as the employee.
- Avoid public confrontations with the employee. Keep the matter private so it won't interfere with the work of others or cause needless embarrassment.

POST-TEST

POST-TEST: WHAT DID YOU LEARN?

1. Cite four areas personnel policies cover:

- a. _____
- b. _____
- c. _____
- d. _____

2. Match the following laws affecting personnel policies with their provisions:

LAW/REGULATION	PROVISIONS
_____ Walsh-Healey Fair Labor Standards	a. Must pay employees at least \$2.30 per hour.
_____ National Labor Relations Act, as amended	Must pay at least time and a half for each hour over 40 hours per week.
_____ Federal Insurance Contributions Act (Social Security)	Must keep accurate time records on employees.
_____ Federal Unemployment Tax	b. Must pay a tax to Internal Revenue Service.
_____ Internal Revenue Code (Federal Income Tax)	Amount of tax depends on employer's history of stability of employment and state unemployment tax.
_____ Title VII of the Civil Rights Acts of 1964 (Equal Employment Opportunity)	If tax liability exceeds \$100 for any quarter, make deposits quarterly.
_____ Occupational Safety and Health Act of 1970	
_____ Age Discrimination Act of 1967	c. Various requirements, including withholding taxes from employee paychecks and filing W-2 forms -- every employer should obtain a copy of Circular E, <u>Employer's Tax Guide</u> , which is available from the Internal Revenue Service.
_____ State and Local Laws	

- d. Employers must comply with job safety and health standards issued by the U. S. Department of Labor.
- e. Wage and hour provisions.
Working conditions.
Disability laws.
Income taxes.
Equal employment.
Civil Service Merit Systems.
- f. Unlawful to discriminate against employee for union activity.

Unlawful to influence employee voting to determine what union, if any, will represent employees.

Unlawful to refuse to bargain with a union which represents a majority of employees.
- g. Unlawful for an employer to do any of the following because of race, color, sex or national origin:

Fail or refuse to hire.

Discharge.

Discriminate with respect to compensation, terms and conditions, and privileges of employment.

Limit, segregate, or classify employees or job applicants in any way that would deprive individual of employment opportunities.

h. Prohibits arbitrary age discrimination in:

Hiring

Discharges

Promotions

Other personnel actions

i. Employer must withhold certain percentage of employee wages.

Employer contributes equal amount.

Employer must have employee identification number.

Employer must file quarterly return on IRS Form 941.

3. Name five potential sources for recruiting personnel:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

4. List ten items that should be included in a job application:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____
- h. _____
- i. _____

5. Match the following kinds of tests with their appropriate local areas:

- | | |
|-------------------------------------|--|
| _____ General Performance Tests | a. Measure a person's ability to learn. |
| _____ Aptitude Tests | b. Measure what a person can do beyond job requirements. |
| _____ Temperament/Personality Tests | c. Measure skills required by the job. |
| _____ Job-related Tests | d. Measure ability to get along with others. |

6. List five (5) guidelines for conducting a job interview:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

7. Below are two major laws affecting personnel recruitment and selection. Describe their major provisions.

- a. Title VII of the Civil Rights Act of 1964 (Equal Employment Opportunity)

- b. Age Discrimination in Employment Act of 1967.

8. Match the following types of training with their definitions:

- | | |
|----------------------------|---|
| _____ Vestibule Training | a. Given to employees by supervisors or other staff. |
| _____ On-the-job Training | b. Initial orientation. |
| _____ Off-the-job Training | c. Conducted by contract because of length or nature of material to be covered. |

9. Suggest ten (10) potential resources for training:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____
- h. _____
- i. _____
- j. _____

10. List five (5) criteria for evaluating training:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

11. Place the following steps in the process of assigning and scheduling work in the proper order: Correct order:

- | | |
|-------------------------------------|-------|
| a. Plan work. | _____ |
| b. Assign work. | _____ |
| c. Determine what needs can be met. | _____ |
| d. Set priorities. | _____ |
| e. Schedule work. | _____ |

12. Cite the three principal items performance evaluations measure:

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

13. Define the following types of personnel action.

(a) promotion:

(b) transfer:

(c) downward transfer:

(d) termination:

SKILL-TEST

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

1. *Below is a description of personnel policy for a given position. What is missing?*

Supervisor, Security Personnel

1. Job Description - The supervisor of security personnel is responsible for the day-to-day supervision of all security personnel: this work involves work planning; scheduling, assigning, and supervising all personnel; training new personnel; and handling performance evaluations.
2. Qualifications - The supervisor of security personnel must meet the following qualifications:
 - (a) To have completed an accredited training course.
 - (b) To have had previous experience in security.
 - (c) To have had previous supervisory experience.
 - (d) The ability to effectively exercise discipline.
 - (e) Sensitivity to the problems of residents.
 - (f) The ability to work with other management personnel, the local police, residents, and social service personnel.
3. Hours of Work - Monday through Friday, 8:00 a.m. - 5:00 p.m. Three weeks of non-accumulative vacation per annum; two weeks accumulative sick leave per annum.
4. Salary - \$14,000 per annum, major medical insurance.

What is missing?

3. *Below are various policy statements about different jobs. Place a check before those which are in violation of the law:*

- (a) Maintenance trainees will start at \$2.10 per hour.
- (b) Security personnel will be given compensatory time for any hours worked over forty (40) per week.
- (c) All employees have the right to unionize.
- (d) Management requires that all employees belong to the union.
- (e) Part-time employees, especially young residents hired to help with maintenance during the summer, will be paid out of petty cash.
- (f) Every employee has the right to unemployment insurance.
- (g) Equal work means equal pay.
- (h) Women do not qualify as security personnel.
- (i) All personnel must retire at age 65.
- (j) Full-time employees must be at least eighteen (18) years of age.

3. The column to the left lists various staff positions. The columns to the right list various sources from which personnel can be recruited for these positions. For each staff position, place a check next to those recruitment sources which are more appropriate.

<u>POSITION</u>	High School and Community Colleges	Vocational Training Programs	Housing Management Training Programs	Employment Agencies	Advertisement in Pro- fessional Journals	Advertisement in Newspapers	Announcement to Residents	Present Employees	Community Groups
1. Security Staff									
2. Security Supervisor									
3. Maintenance Staff									
4. Maintenance Supervisor									
5. Clerical Staff									
6. Cashier/Accountant									
7. Assistant Manager									
8. Social Service Staff									
9. Social Service Supervisor									
10. Billing Clerk									

4. Below is a job application form from a hypothetical housing authority.
What is missing?

JOB APPLICATION FORM

Name: _____

Address: _____

Telephone: _____

Date of Birth: _____

Place of Birth: _____

Position Applied For: _____

Grade school attended: _____
from _____ to _____

High school attended: _____
from _____ to _____

Previous work experience: (Start from last job held)

Position: _____ from _____ to present
Nature of Work: _____

Position: _____ from _____ to _____
Nature of Work: _____

Position: _____ from _____ to _____
Nature of Work: _____

References (include Name, Address, and Title if appropriate)

(1) _____

(2) _____

(3) _____

5. *Tests that measure general performance, aptitude, and temperament have been successfully challenged in the courts because they were not job-related. Which of the following test items do you feel are appropriate?*

For clerical staff?

- _____ (a) Type this paragraph in five minutes with fewer than five mistakes.
- _____ (b) Add this column of figures.
- _____ (c) Do the following square roots.
- _____ (d) Answer True (T) or False (F) to the following Statement: Many welfare recipients have illegitimate babies to increase the amount of their welfare checks.
- _____ (e) If $x^2 = (x)(x)$, what does $y^2 = ?$

For maintenance staff?

- _____ (f) Mr. X can wax 2,500 square feet in an hour. Mr. Y can wax 3,000 square feet in an hour. If they work together, how long will it take them to wax 11,000 square feet?
- _____ (g) Have you ever fixed a leaky faucet?
- _____ (h) How would you fix it?
- _____ (i) What do you think about residents who neglect the care of their appliances?
- _____ (j) What kind of paint is best for interior wall surfaces?

For security staff?

- _____ (k) Did you ever work as a security guard before?
- _____ (l) Where?
- _____ (m) Do you think most residents get involved in illegal activities?
- _____ (o) If $x^2 = (x)(x)$, what does $y^2 = ?$

For social service staff?

- _____ (p) Do you like working with people?
- _____ (q) Where should you go if you need transportation services?
- _____ (r) Answer True (T) or False (F) to the following statement:
Many welfare recipients have illegitimate babies to increase
the amount of their welfare checks.
- _____ (s) Do most residents of public housing want to live there?
- _____ (t) Why are many poor families headed by females?

6-7. *You are seeking to hire a supervisor of social services. Look at the requirements for the job and then select the best candidate:*

Job requirements
Supervisory experience: 3 years
Age: 35
Graduation from an accredited school
Membership in the U. S. Federation of Social
Service Workers

Candidates:

J. BLACK

Personal: Born March 3, 1940, New York
Married, 2 children

Education: Eastern Shores, MSW, 1963

Employment: Caseworker, New York Department of Welfare,
1963-65
Lecturer in Casework Eastern Shores, 1966-71
Supervisor, New York Children's Agency, 1971

L. GREEN

Personal: Born December 30, 1943, Baltimore
Married, 3 children

Education: Southern Comfort, MSW, 1968

Employment: Caseworker, Family Service Agency, 1966-68
Supervisor, Children's Aid, 1968-70
Supervisor, Family Service Agency, 1970

R. WHITE

Personal: Born June 15, 1937, Los Angeles
Married, no children

Education: Pacific Slopes, MSW, 1967

Employment: Parole Officer, Idaho Parental School, 1967-70
Chief Probation Officer, 1970

A. RED

Personal: Born January 10, 1939, Chicago
Married, 1 child

Education: Western Seas, MSW, 1967

Employment: Caseworker, Children's Agency, Chicago, 1967-68
Caseworker, Family Welfare Society,
Urbana, 1968-69
Case Supervisor, Family Welfare Society, 1969

B. GRAY

Personal: Born January 15, 1938, Middletown, New York
Married, 1 child

Education: National School of Social Services, London,
United Kingdom, MSW, 1966

Employment: Caseworker, Lutheran Family Service, 1966-68
Lecturer, Southern Comfort, 1968-69
Director, Lutheran Family Service, 1969

H. BROWN

Personal: Born March 3, 1937, Des Moines
Single

Education: Lonely Pines, MSW, 1962

Employment: Parole Officer, Big Mound Detention Center,
1962-66
Counselor, Children's Mental Health Center, 1966-68
Director, Western County Center for Girls, 1968

Accredited Schools of Social Work

School	Year Accredited
Eastern Shores	1950
Southern Comfort	1947
Slippery Rock	1956
Shady Tree	1969
Oak Hill	1973
Pacific Slopes	1969
Frozen Lake	1942
Bakers Bay, UK	1963
Western Shores	1940
Northern Comfort	1932
Western Seas	1939
Atlantic Hills	1920
Salem Harbour, Canada	1940
Rusty Rail	1958
National School, UK	1920
Oak Grove	1937
West Lake	1967

Criteria for Membership in the U. S.
Federation of Social Service Workers:

- (1) Graduation from an accredited U. S. School of Social Work
- (2) Application
- (3) 1 Year experience
- (4) \$25 per annum

Which candidate is best suited for the job?

Why?

Please comment on the eligibility criteria based on legislation affecting recruiting and selecting employees.

8. Indicate what type of training the following problem situations require.

SITUATION	Vestibule Training	On-the-job training by supervisors	Off-the-job training by consultants
(a) Maintenance staff need to learn how to repair new models of kitchen appliances			
(b) Social Service staff need extensive training in counseling skills			
(c) The budget clerk does not know how to apply for vacation leave			
(d) A security guard does not know how to apply for vacation leave			
(e) Social Service staff need to learn how to complete the new referral forms			
(f) All security staff need sensitivity training because of poor attitudes towards residents			
(g) Clerical staff are having trouble changing ribbons on the new typewriters			
(h) A maintenance man has been using the electric waxer incorrectly			
(i) Social Service staff are unaware of community resources available to residents			
(j) Security staff need licensing by the state authority			

9. *Suggest appropriate training resources for the following personnel problems:*

SITUATION	RESOURCE
(a) Maintenance staff need to learn how to repair the new models of kitchen appliances.	<hr/>
(b) Social service staff need extensive training in counseling skills.	<hr/>
(c) The budget clerk does not know how to run the adding machine.	<hr/>
(d) A security guard does not know how to apply for vacation leave.	<hr/>
(e) Social service staff need to learn how to complete the new referral forms.	<hr/>
(f) All security staff need sensitivity training because of poor attitudes toward residents.	<hr/>
(g) Clerical staff are having trouble changing ribbons on the new typewriters.	<hr/>
(h) A maintenance man has been using the electric waxer incorrectly.	<hr/>
(i) Social service staff are unaware of community resources available to residents.	<hr/>
(j) Security staff need licensing by the state authority.	<hr/>

10. Describe why or why not the following kinds of training would be cost-effective:

(a) The accounting clerk has some light typing skills; she wants to become a secretary in the management office because the job has potential to pay more. Since she is a good worker, the manager decides to train her to type. She takes an hour from her morning work schedule to attend typing class at a local high school.

(b) Social service staff need training in interviewing and counseling skills. A university-based consulting firm can provide a training package that would cover the necessary skills in four half-day sessions. The manager decides to have the consultants come in every morning for four consecutive days.

(c) Social service staff are unaware of the resources available in the community. The supervisor decides to send two on a field visit to a local Information and Referral Agency. The manager agrees to let them spend three working days there.

- (d) Maintenance staff need to learn how to service the new appliances. The manufacturer has agreed to let them take a three day training course covering minor repairs. The manager decides to let them go.

- (e) Security staff need sensitivity training to the problems and needs of residents. A local consultant agrees to provide a day's training in attitudes and misconceptions about residents of public housing. The manager agrees.

11. *Read the following instructions.*

1. You are to assume the role of Mr. Uname.
 - a. You are the Project Manager of a 580-unit project in the Central City Housing Authority.
 - b. It is 11:00 a.m. Monday, November 16. You have been in court this morning and have just arrived at your desk. You have been away from the office since Wednesday evening, November 11, taking two days of your annual leave.
 - c. During your absence a number of memos and messages have been placed in your "in" basket.
2. You are to read over each item and decide whom to assign the work to.
3. Record the person to whom the item should be assigned on the Decision Sheet.
4. Record the order in which each item should be handled in the Order of Priority Column.

Note: A Directory of Personnel for the Central City Housing Authority is included for your convenience. You may refer to it and use the information in it as needed.

CENTRAL CITY HOUSING AUTHORITY - DIRECTORY

BOARD OF COMMISSIONERS

Mr. M. Banker, Chairman
Mr. C. P. Accountant
Mr. L. Merchant
Mr. A. F. Labor
Mr. J. P. Attorney

CENTRAL OFFICE STAFF

Mr. T. Headman	Executive Director
Mr. R. Estate	Director of Housing
Mr. U. R. Boss	Director of Management
Mr. B. Fixer	Superintendent of Maintenance
Mrs. V. Friendly	Director of Resident Services
Mr. I. L. Filler	Manager - Rental Office
Mr. L. Bid	Manager of Purchasing
Mr. W. Tightfist	Comptroller

PROJECT STAFF - West Side Manor Project

Mr. Uname	Manager
Mr. L. Resident	Assistant Manager
Miss S. Worker	Resident Services Aid
Miss B. Doer	Bookkeeper - Review Clerk
Mr. J. Alltrades	Maintenance Foreman

RESIDENT COUNCIL

Mrs. I. M. Elected	President
Mr. T. D. Driver	Vice President
Mrs. I. W. Writer	Secretary

PROJECT MANAGER - DECISION SHEET

Item #	Assigned to	Order of Priority
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

I. Mrs. Johnson came by to explain that the reason she didn't pay her rent last month is that she had to send money to her daughter who is in the hospital. She wants to know if she can make partial payments of \$5.00 a month until she makes up the \$55.00 she owes. Policy does not permit partial payments.

II. Mrs. Smith called to complain about Mrs. Wilson's pet canary. She says she doesn't know why Mrs. Wilson is allowed to have a pet when you made her get rid of her dog. She is going to get her kids a new dog unless you make Mrs. Wilson get rid of her bird. Mrs. Wilson is handicapped and does not get out much.

III.

Wednesday, November 11

Mr. Uname
Manager
Central City Housing Authority
Central City

Dear Mr. Uname:

I want to know why I can't have my apartment painted. It has not been painted since I moved in 18 months ago.

I am a good housekeeper and have kept my walls very clean, but the cheap paint you used won't take the scrubbing you have to do to keep them clean with five kids running around.

Mr. Alltrades tells me I have to wait six months before I can get paint. This doesn't seem right especially since the color of my walls doesn't go with the curtains I made for my windows.

Please help me.

Sincerely,

Mrs. Jones
Resident

Friday, November 13

Memo To: Mr. Urname

From: Mr. L. Resident - Management Aide

At your request I called on the Barton Family to find out why they are refusing to pay their rent for last month.

Mrs. Barton is complaining that the hinge on her refrigerator door broke five weeks ago and can't be repaired. She claims that food can't be kept in it the way it is and that it is too small anyway.

Mr. Alltrades says he had to order a new hinge and that he will be able to have the door fixed in a week. He also told me that Mrs. Barton doesn't really want the door fixed but wants a new unit.

Two weeks ago Mr. Barton talked to someone from Legal Aid who advised him not to pay any rent until we provided him with a refrigerator that was in good condition and that was adequate to the needs of his family.

I checked the refrigerator. It is six years old and is the largest size that will fit into those old style kitchens.

Thursday, November 12

Message To: Mr. Urname

From: Mr. Alltrades - Maintenance Foreman

How can I get my job done when residents like Mrs. Wilson refuse to cooperate? Yesterday she refused to let the Ace Pest Control men into her unit. She was notified a week ago that her unit was scheduled to be treated. She says she keeps a clean house and doesn't need all that poison spread around in it. The Ace men say that we are throwing away our money unless they can treat every unit in the building. What should I do about this? Her neighbors are giving me a hard time about the roaches in their apartments which they say are coming from hers.

VI.

Memo To: Mr. Urname

From: L. Resident - Management Aide

Friday night I attended a meeting of the recently formed Westside Citizens Action Committee. This is a community group, but it is largely made up of non-white residents from our project. This group feels that CCHA is insensitive to the needs of the young minority families in the community. They cite the following:

1. 90% of the people living in the Westside area are non-white, but only 60% of the people living in the project are non-white.
2. Only 2 residents (myself and a maintenance man) are employed in the project. None are employed at the Central office.
3. The Resident Council is dominated by old people and is not representative.
4. The Resident Council is dominated by the Manager.
5. Young, minority families are discriminated against.
6. The Authority does nothing for the community. Non-resident groups are not allowed to use project facilities for meetings and other purposes.
7. Most of the families evicted are young and non-white.

The committee is planning to meet with two other neighborhood groups to draw up a list of demands which they will give to Mr. Headman and Mr. Banker. There was some talk of staging a rent strike if the demands are not met. One of the demands will be the appointment of a resident to the Board of Commissioners.

VII.

Thursday, November 12

Mr. Uname
Manager
Central City Housing Authority
Central City

Dear Mr. Uname:

At our last Resident Council meeting I learned that the two public schools adjacent to the project have decided to close the playgrounds and gymnasium to our children after 5:00 p.m. on weekdays and on weekends and holidays. The reason given for this action is that the custodians who have been responsible for watching the children and for closing up when they went off duty are unable to control the vandalism that has been taking place after the playground supervisor and gym teachers have left for the day.

The parents feel certain that the problem is caused by a gang of kids that live outside the project. Why must our children be deprived of places to play because of those other hoodlums? Why don't the police do something about this?

The council wants you to do something to correct this injustice and protect the rights of our children.

Respectfully,

I. M. Elected
Mrs. I. M. Elected
Resident Council
Resident

VIII.

Police Sergeant Keller returned your call about the windows that were broken last night on South Project Street. He said that the Patrolmen that investigated the complaint, called in by Mr. Jackson, learned that the windows were broken by three older teenagers who threw rocks and made threatening remarks to the residents in the area. They questioned all the witnesses, but could find no one who was willing to identify the boys or file a charge against them. He said that unless one or more witnesses are prepared to file charges and identify the vandals there is nothing more that he can do. He suggests that you advise these residents that they must cooperate with his men if they are to have any effective law enforcement program in this neighborhood.

IX.

Friday, November 13

Memo To: Mr. Uname

From: B. Fixer - Superintendent of Maintenance

Re: Mrs. C. Smith

Yesterday I sent Bill Plumber to Mrs. Smith's apartment to replace her hot water heater. She has called this office everyday for the last three days about this work order, but when Bill arrived she didn't want to let him in and gave him a going over that no man should have to take. There were a lot of other residents listening in too. Bill is so mad he is threatening to quit unless she gives him an apology. I can't afford to lose a good man so it's up to you to see that she does.

X.

Friday, November 13

Memo To: Mr. Uname

From: L. Resident - Management Aide

While you were out Mrs. C. Smith came in with a complaint against one of the Fixer's plumbers. She was very upset. She says that she has been trying to get an emergency with her hot water heater taken care of for the last five days. No one in Fixer's office would tell her when the work would be done other than to say they would fix it as soon as possible. She said that without letting her know they were coming a plumber showed up just as she was leaving to keep an appointment at the Health Clinic. She says she doesn't understand why she has to let someone come in and mess up her apartment when she isn't there to look after her things and that if they had called her she could have arranged to be at home. She also complains that the plumber was very rude to her and wouldn't listen to her complaint. When she left home she said she was going to take this up with Mr. Headman because the plumber had the nerve to ask her for an apology.

END OF SKILL-TEST ITEM 11

12-13. *Read the following case study:*

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 his 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) *Briefly evaluate Mr. Green's job performance. Be sure to include all relevant criteria:*

(b) What is the appropriate personnel action to take?

(c) How would you handle this action?

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