

ARCHDIOCESE OF CHICAGO



# School Marketer Evaluation Process Webinar

Hosted by:  
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# Agenda

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- Prayer
- Introduction of Speaker
- Importance of a Marketer Review
- Marketer Evaluation Template
- How to conduct the process
- What you should do if you are not pleased with the performance your school Marketer
  - ❖ Consider the Performance Improvement Plan
    - Definition
    - Completing the PIP
    - Performance Improvement Plan
    - Explaining the PIP
    - Corrective Action/Separation of Employment

# Prayer by Kitty O'Meara

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Dear Heavenly Father as we come together at this difficult time we ask for your cleansing and healing Spirit to descend upon us to protect us to guard us and to guide us

As you said to those who questioned you about the blind man and those who questioned you at the death of Lazarus

that this was for the glory of God let us see your glory at this time of challenge as we shelter in place let us remember those who have no shelter, no food, no family and no friends let us find shelter in your strength

Give us the courage and creativity of faith to be the light of Christ to others

Enable us to walk today and everyday in the confidence of faith assured of Your healing and redemptive power

We ask this in the name of your Son our Lord, Jesus Christ who lives and reigns forever and ever

Amen





# Introduction of Speakers

## **Felicia R. Horton**

- Associate Director, Office of Catholic Schools Marketing & Enrollment Department
- Marketing & Enrollment Manager, Vicariates V & VI
- Employed with the Archdiocese of Chicago for over 4 years.
- A senior-level integrated marketing and communications (IMC) professional with more than 20 years' immersive experience in integrated marketing communications and over 15+ years in the Education Industry.
- Bachelor's Degree in Communications from Bradley University and Master's Degree in Integrated Marketing Communications from Roosevelt University



## **Karina Jimenez, SHRM-SCP**

- Human Resources Manager, Vicariate III
- Experienced Human Resources Manager with a demonstrated history of working in the non-profit organization management industry. Skilled in Nonprofit Organizations, Program Evaluation, and Volunteer Management.
- Karina holds a Master's Degree focused in Public Policy and Administration from Northwestern University.



# What is an employee/Marketer performance review

A Marketer performance review is an opportunity for you and your Marketer to assess what's going well, what isn't going well, and what's necessary for future success with the School.

There are a few things to note about this definition:

- It shouldn't feel like an interrogation. A good review shouldn't focus solely on negatives.
- Feedback gathered in a review should be considered and implemented throughout the year.
- This should be a two-way conversation. They aren't just about assessing the performance; they're also an opportunity to get the Marketer's take on how they're doing and how the school is doing.



# What Are the Benefits to Running Employee Reviews for Marketers?

- It's important to understand that these meetings are more than just an annual requirement that you have to fulfill.
- Your Marketer needs an honest assessment of their performance. If they don't know how they're doing (positively or negatively) or where they need to improve, they're unlikely to reach their potential.
- You need to know what your Marketer needs to succeed. Likewise, you can't help your Marketer achieve success unless you understand what they need from you.
- If you don't set up employees for success, someone else will (when they leave your School). The market for marketing talent is tight. Don't let your Marketer leave because they didn't feel supported.



# How can improving your performance process help?

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**There are three ways the annual review can help you retain your Marketers:**

- Use them as an opportunity to hear their concerns
- Find out what type of role or work they'd most like to do
- Determine how you can provide a path to help them get where'd they like to go

By treating reviews like a two way conversation instead of an annual obligation, you can increase employee engagement and hold on to your Marketer who is performing well.



# Marketer Evaluation Template

OCS has created a marketer evaluation template to help with the review process. The Template process includes the following:

- 1) Step 1: Review Form: Data Entry Sheet: Steps for Data Entry
- 2) Step 2: Skills Ratings and Observations Category:
  - Coordination & Direction of Staff and Volunteers
  - Execution of Direct Marketing Activities
  - Planning, Proj. Mngmt., and Continuous Skill Improvement
  - Creative Skills
  - Technical Skills
  - Development Activities – if applicable
  - Each skill can be rated with distinctive, proficient, needs improvement, unsatisfactory, not applicable and not observed. There is a description for each rating to help you.
- 3) Step 3: Developmental Priorities and Capacity Assessment:
- 4) Step 4: Approvals

You can access the Marketer Evaluation Template here: [OCS School Marketer Evaluation Tool](#)



# How Often Should Reviews Be Conducted?

- Here's a common misconception: staff reviews are a once-a-year deal where you deliver all of your feedback. This could not be more incorrect, but unfortunately, it's common.
- So, how often should feedback be scheduled? Consider the following:
  - Weekly syncs: Schedule a recurring one-on-one meeting with your Marketer to check-in on how things are going.
  - Quarterly check-ins: Schedule quarterly meetings to review how things have gone year-to-date and what's needed for success over the long term.
  - Annual reviews: Finally, these are holistic performance evaluations that take the entire previous year into consideration.
- For Marketers, ongoing mentorship with leadership is invaluable for development.
- Remember - an annual review should not be the first time an employee hears a given piece of feedback.
- This is a sign they don't feel like they can be open and honest with how things are going outside of times allotted for feedback, and that's corrosive for everyone's productivity and happiness at work.



# Scheduling Your Review Meetings

The best way to make sure your review meetings actually happen is to schedule them on a regular basis. Schedule the following using your school's shared Google or Outlook calendar:

- Weekly meetings: Stick to a set time each week.
- Quarterly reviews: Stick as closely to a 90-day window as you can.
- Annual reviews: Same as with quarterly reviews, they should be close to their start date each year.

Map these all out in advance so they don't catch anyone off guard.



## Planning the review meeting:

Before heading into a review, you'll need to know what you honestly think about your Marketer's performance, both in terms of what they're doing well and where they can improve.

It can help to have some sort of checklist to run through when assessing your Marketer.

In order to keep your meetings focused and conversational, do the following before meeting face to face:

- Does the team member demonstrate high level of job knowledge?
- Does the team member complete work accurately and on time?
- Does the team member work well with others?
- Does the team member communicate effectively?
- Does the team member demonstrate initiative?
- Does the team member consistent show up to work on time?



What if you feel your Marketer's performance is not satisfactory?

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What should you do:

Consider the Performance Improvement Plan

# Performance Improvement Plan

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A performance improvement plan (PIP) is a tool provided to an employee who is not meeting performance expectations over an extended period of time. It is developed to help them improve their performance and succeed in their role.

It is often used to address performance deficiencies on specific job goals or to improve behavior related concerns.

***We want to ensure that we provide the employee with the opportunity to succeed and the PIP is a tool designed to help them do so!***



# Performance Improvement Plan

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A PIP:

- Documents key behaviors and specific deliverables against a measurable method of success.
- Is developed by the supervisor and reviewed by both the supervisor and the employee.
  - Both sign off on it to indicate there is an agreement of what successful behavior and/or performance outcomes looks like.
- At the end of the designated timeframe, performance is reviewed against the set deliverables to determine if the employee is taken off the Performance Improvement Plan. If deliverables are still not being met, contact HR.
  - You should be monitoring and checking in on the employee's progress.





# Completing the PIP

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It is important that you are being thorough when completing the PIP. Take your time when completing the document and make sure that “areas of improvement” and “action needed” items are clearly defined.

Start with an introductory paragraph and end with a closing paragraph.

Both the manager and employee should sign the document acknowledging understanding.



# Performance Improvement Plan Sample

## Performance Improvement Plan

Date: \_\_\_\_\_

Employee Name: \_\_\_\_\_



**INTRODUCTORY PARAGRAPH OF WHAT HAS BROUGHT THE EMPLOYEE TO THIS (PIP) POINT.**

Area to improve/change:	Action needed:	Deadline:	Notes:	Follow-up needed? Y/N
Ex. Provide advice and interpretation of monthly financial reports	Provide timely financial reports which highlight variance and demonstrate clear interpretation and recommended actions	By the 15 <sup>th</sup> of the following month	All reports and interpretations should be fact-based	Review with Pastor prior to presentation to finance council meetings

**CLOSING PARAGRAPH:** Closing paragraph should note that immediate and sustained progress must be demonstrated and that we hope the employee will take this seriously and be successful

**Consequences:** Failure to satisfactorily implement and faithfully adhere to the Performance Improvement Plan will result in further disciplinary action up to and including termination of employment.

\*Your signature below serves only to acknowledge that you have received this memo, understand its content as well as what is expected of you, and you've been given the opportunity to ask questions.

\_\_\_\_\_  
Employee's Signature\*

\_\_\_\_\_  
Date



# Explaining the PIP

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The thought of a PIP can be a scary thing. Reassure the employee that they are being put on a PIP to help them succeed in their role.

Advise them that the tool is intended to help them define what success looks like and put them on a path to attain it!



# Written Discipline Notice vs. PIP

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Generally, a PIP is more appropriate when there are a series of action steps necessary to support the employee. A PIP serves as a coaching and training tool when it comes to professional behavior, as opposed to addressing personal behavior.

## **Ex.**

### *Create a PIP:*

You may create a PIP for someone that needs to meet specific goals (e.g. enrollment numbers).

### *Write-Up*

You may write someone up for tardiness.



# Corrective Action/Separation of Employment

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- Documentation is required to support employment decisions.
- Counseling, verbal warnings, written warnings, and suspensions can be used to correct employee performance issues.
- Minor issues can be addressed through discussion or a written constructive criticism, which does not carry the same weight as a written discipline notice.
- Address and document performance concerns along the way. Do not wait until you're frustrated or are ready to terminate the employee.



## If Ending the Employment Relationship...

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**ALWAYS contact Human Resources** for guidance whenever you have a situation you believe could escalate to the point of discharge.

Before terminating an employee, contact HR to understand your obligations as the employer, limit liability and reduce risk of litigation.

**Each case is unique**, some circumstances may warrant immediate discharge without prior discussions/warnings.

**Prior to dismissal or non-renewal, HR must be contacted.**





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