



# Home Means Nevada, Inc.

## Employee Performance Review

### Employee Information

<b>Name</b>	Lana Smith	<b>Hire Date</b>	December 18, 2017
<b>Job Title</b>	Project Assistant	<b>Date</b>	December 18, 2018
<b>Department</b>	Home Means Nevada, Inc.	<b>Manager</b>	Michelle Crumby, Operations Manager
<b>Review Period</b>	December 2017 – December 2018		

### Ratings

	1 = Poor	2 = Fair	3 = Satisfactory	4 = Good	5 = Excellent
<b>Job Knowledge</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>	Ms. Smith has demonstrated she can perform the Tasks identified in the Job Description (Exhibit 1) and can provide necessary information concerning the Foreclosure Mediation Program accurately and professionally to all Stakeholders.				
<b>Work Quality</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>	Ms. Smith preforms her job duties in a thorough, professional, and accurate manner based on the Job Description (Exhibit 1) and the direction of the Operations Manager.				
<b>Attendance/Punctuality</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>	Ms. Smith has good attendance and punctuality.				
<b>Initiative</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>	Ms. Smith has shown great initiative in helping Home Means Nevada, Inc. preform the required functions of the Foreclosure Mediation Program. Mrs. Smith has been a leader in learning the Portal with Hope LoanPort, helping co-workers and stalkholders, identifying issues, and submitting them to be resolved.				
<b>Communication/Listening Skills</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<i>Comments</i>	Ms. Smith has performed the necessary communication requirements (Exhibit 1) well. Daily, she shows good judgement and skill in communicating and interacting with Stakeholders. Additionally, Ms. Smith communicates well with the Operations Manager and co-workers. I would like to see Ms. Smith be more through in written communication demonstrating knowledge of her role as Project Assistant to resolve questions or concerns with less back and forth.				
<b>Dependability</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>	Ms. Smith is dependable and reliable. She can be counted on to follow instructions, complete tasks, and preform the necessary job duties and tasks related to the Project Assistant position. Ms. Smith is very helpful in working with Operations Manager to resolve complicated or escalated issues.				
<b>Overall Rating (average the rating numbers above)</b>	4.5 of 5				

## Evaluation

**Additional Comments:** Ms. Smith is a valuable asset to Home Means Nevada, Inc. and has proven she can perform the functions identified in (Exhibit 1) well. Ms. Smith is dedicated to her work and to carrying out the tasks of Home Means Nevada, Inc. to the best of her ability.

**Goals:** Goals for Ms. Smith include continued perform of the Tasks and Job Duties identified in (Exhibit 1) at the highest level and to increase efficiency. Additionally, goals include for Ms. Smith to continue to learn and work closely with the Operations Manager, Stakeholders, and HLP to improve the functionality and communication of the Portal through HLP. Also, I would like to Ms. Smith to continue to grow in role as Project Assistant and take on more responsibility broadening knowledge and skillset. Lastly, I would like Ms. Smith to monthly audit all open cases to which are aged to make sure all information is up-to-date and track down any missing information.

## Verification of Review

*By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.*

Employee Signature		Date	
Manager Signature		Date	

## **Exhibit 1**

### **Job Description**

#### **JOB TITLE: Project Assistant**

**Reports To:** Operations Manager  
**Prepared by:**

**Status:** Exempt  
**Approved:**

#### **Job Description: Project Assistant**

**General Purpose:** Under the guidance of the Operations Manager, the Project Assistant is responsible for carrying out the daily functions of the Home Means Nevada, Inc. Foreclosure Mediation Program, seeing to it that all aspects are fully attended to and completed according to program requirements. This includes but is not limited to performing administrative and office support activities by collecting and providing program related data, preparing correspondence and reports, managing records, handling information requests, greeting visitors, screening telephone calls, arranging conference calls and scheduling meetings.

#### **Tasks:**

- Adherence to all company policies
- Organize and maintain program files and Foreclosure Mediation Program Portal
- Track timelines and operations of Home Means Nevada Foreclosure Mediation Program to ensure it complies with Senate Bill (SB) 490 and other federal and state foreclosure mediation regulations
- Maintain pro-active management style approach to anticipate and minimize or prevent potential problems or conflicts
- Facilitate timely preparation and delivery of all required documentation
- Resolve customer issues or questions, as needed
- File and retrieve corporate documents, records, and reports
- Confer with Operation Manager and staff to plan and develop methods and procedures to lower costs and obtain greater program efficiency
- Monitor accounts payable and budgeting
- Conduct research and prepare reports, dashboards, analysis, and other documents
- Type and edit memos, letters and program related documents
- Design correspondence forms and standardize document templates
- Read and analyze incoming general memos, submissions, reports, invoices to determine their significance and plan their distribution
- Assist Operations Manager and staff members with scheduling meetings, calls and travel plans
- Establish sound working relationships and cooperative arrangements with Trustees, Grantors, and Courts and other entities that would use our services
- Other duties as assigned

#### **Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Education and Experience:**

- Minimum of 2 years of experience performing administrative duties or duties in a related field
- Ability to define problems, collect data, establish facts, and draw valid conclusions
- Exceptional written and oral communication skills
- Advanced level MS Office Suite skills
- Strong attention to detail and accuracy
- Ability to multitask and prioritize accordingly
- Excellent customer service, organization, negotiation and problem-solving skills
- Demonstrated knowledge of telephone etiquette, a professional attitude and integrity
- Good judgment with the ability to make timely and sound decisions
- Must have strong, detailed organizational skills with the ability to prioritize and manage multiple projects and deadlines.
- Must be a self-starter and take initiative
- Versatility, flexibility, and a willingness to work within constantly changing priorities with enthusiasm

**Physical Demands:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable challenged individuals to perform the essential functions. Ability to maintain manual dexterity with prolonged computer operation; to sit for extended periods and to lift files, rarely exceeding 25 pounds.

**Work Environment:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is exposed to moderate noise distractions.

**Direct Report:** The Project Assistant reports directly to the Operations Manager. The Project Assistant may also be required to perform tasks for the Board of Directors overseeing the program.

**COMPANY:**

Home Means Nevada, Inc.

**EMPLOYEE:**

Lana Smith

By: \_\_\_\_\_ Date: \_\_\_\_\_ By: \_\_\_\_\_ Date: \_\_\_\_\_  
Name: Michelle Crumby Name: Lana Smith  
Its: Operations Manager



# Home Means Nevada, Inc.

## Employee Performance Review

### Employee Information

Name	Lana Smith	Hire Date	December 18, 2017
Job Title	Project Assistant	Date	December 18, 2018
Department	Home Means Nevada, Inc.	Manager	Michelle Crumby, Operations Manager
Review Period	August 2018-December 2018		

### Ratings

	1 = Poor	2 = Fair	3 = Satisfactory	4 = Good	5 = Excellent
Job Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments	In my capacity with my work, I strive to find proven strategies and research different obstacles that can improve my work and other.				
Work Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments					
Attendance/Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments					
Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Comments	Very strong - always willing to help, share information to team members. Example - new portal, finding issues, and advising				
Communication/Listening Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments					
Dependability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comments					

Overall Rating (average the rating numbers above) \_\_\_ of 5

### Evaluation

#### ADDITIONAL COMMENTS:

In my capacity as a project assistant, use sound judgement and common sense used in the following example;  
 "Downrats right"  
 during research of a case pending a certificate I go the extra

write and contact trustee when I found a concern involving a new deed. I verify that the trustee was paid in full and if a resession will be made.

GOALS

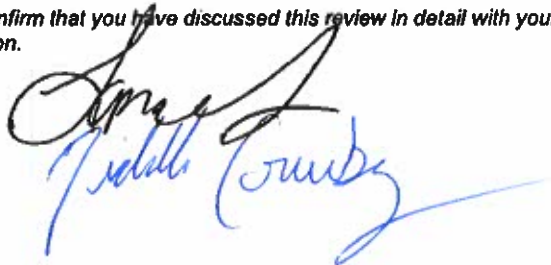
Use lateral thinking skills. Problems can be opportunities they allow you to see different things

Improve writing skills - providing more context and clarify data

Verification of Review

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Employee Signature



Date

1/9/19

Manager Signature

Date

2/3/19