HOUSING SPECIALIST

Professional Competency & Performance Evaluation Workbook

Professional Download #28 — Final Resource in the Library

Purpose
This workbook brings together the skills covered across the Housing Specialist professional library. It supports self-assessment and supervisor discussions on client engagement, housing-program knowledge, case management, landlord coordination, ethical practice, productivity and professional development. It includes a rating guide, evidence log and a 90-day improvement plan so assessment leads to action.

1. Assessment Instructions & Rating Scale

Complete the scorecard honestly based on your recent practice (last 90 days). Use specific examples in the evidence sections. Discuss results with your supervisor and turn insights into a concrete 90-day plan.

Rating Scale

1 – Emerging: Needs significant support and structured guidance
2 – Developing: Shows progress but inconsistent; requires regular coaching
3 – Proficient: Meets expectations consistently in routine situations
4 – Advanced: Strong, reliable performance; handles complexity well
5 – Exemplary: Models best practice; supports others and improves systems

Housing Specialist: _____ **Review Period:** _____

Supervisor: _____ **Date:** _____

2. Core Housing Specialist Competency Scorecard

Rate each area 1–5 using the scale on page 1.

Competency Area	Self	Supervisor	Notes / Examples
Client engagement & rapport	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Housing needs assessment	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Housing program knowledge	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Case management & documentation	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Landlord / partner coordination	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Advocacy & problem-solving	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Professional communication	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Ethics, boundaries & confidentiality	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Time & caseload management	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	
Professional development & learning	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5	

Overall self-assessment summary (2–3 sentences):

_____

_____

3. Ethics, Productivity & Performance Evidence

Provide brief, specific examples from the review period.

Example of strong ethical / boundary practice:

_____
_____

Example of effective client advocacy or problem-solving:

_____
_____

Example of productive caseload / time management:

_____
_____

Example of effective coordination with landlords or partner agencies:

_____
_____

Area where results were below my own standard (and what I learned):

_____
_____

4. Professional Strengths & Development Needs

Top 3 current strengths (be specific):

1. _____
2. _____
3. _____

Top 3 development priorities for the next 90 days:

1. _____
2. _____
3. _____

Resources / support that would help me improve:

■ Targeted training / toolkit practice ■ More frequent supervision
■ Shadowing / peer observation ■ Clearer caseload expectations
■ Mentoring from experienced colleague ■ Other: _____

Supervisor observations on strengths and development needs:

_____
_____
_____

5. 90-Day Performance Improvement Plan

Goal 1 (linked to a development priority):

_____

Specific actions + target dates:

_____

How progress will be measured:

_____

Goal 2:

_____

Specific actions + target dates:

_____

How progress will be measured:

_____

Goal 3 (optional):

_____

Specific actions + target dates:

_____

Check-in schedule:

■ 30-day check-in date: _____ ■ 60-day check-in date: _____
■ 90-day review date: _____

6. Supervisor Review & Follow-Up Checklist

Supervisor confirmation

- ■ Scorecard reviewed and discussed with the Housing Specialist
- ■ Evidence examples discussed
- ■ Strengths acknowledged
- ■ Development priorities agreed
- ■ 90-day plan is realistic and measurable
- ■ Support / resources identified and committed
- ■ Follow-up dates scheduled

Supervisor overall comments:

_____
_____
_____

Any organizational barriers or workload factors to note:

_____
_____

Housing Specialist Signature	Date	Supervisor Signature
_____	_____	_____

This completes the 30-resource Housing Specialist Professional Library.
File this evaluation in the specialist's professional development record. Revisit the 90-day plan at the scheduled check-ins and adjust as needed.