

# DRI Consulting Graduate Psychology Practicum/Intern Role Description and Performance Review Form (revised 3/03)

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The following document serves three distinctive purposes: 1) clarity of role and rating sheet for prospective new-hire, 2) definition of role for job once hired, and 3) evaluation sheet for annual review as an employee.

First, rate each item using the following scale as it relates to skill:

<u><b>Poor</b></u>		<u><b>Meets Expectations</b></u>		<u><b>Exceeds Expectations</b></u>
1	2	3	4	5

*Note: A 3 is the expected, typical score for most people. Ratings of a 2 or 4 require evidence of somewhat beyond or below average performance as compared with others in the same or similar positions. A rating of 5 or 1 requires special comments in the white space to the right of the item to substantiate your rating. As a guide, use the 3 rating about 50% of the time, the 2 and 4 about 15% of the time and the 5 and 1 about 10% of the time, if applicable.*

Second, rate each item using the following scale as it relates to interest:

<u><b>Low</b></u>		<u><b>Average</b></u>		<u><b>High</b></u>
1	2	3	4	5

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## I. Key Accountabilities and Responsibilities:

- A. \_\_\_/\_\_\_ **Outbound Sales:** Assist in Generating New Business (weighting is 20 to 30% of time)
1. \_\_\_/\_\_\_ Market prospective clients and follow up to close sales
  2. \_\_\_/\_\_\_ Present DRI Consulting in a friendly, helpful manner to clients

**Comments:**

- B. \_\_\_/\_\_\_ **Prospective Client Intake Assessment** (weighting is 10-20% of time)
1. \_\_\_/\_\_\_ Administer at least 10 needs (intake) assessments per month
  2. \_\_\_/\_\_\_ Present DRI Consulting in a friendly, helpful and expert manner to prospects that leads to the person buying from DRIC
  3. \_\_\_/\_\_\_ Gather and record accurate and timely information from prospective clients using "Phone In-take" script and clinical skills. Maintain in prospect file system
  4. \_\_\_/\_\_\_ Provide DRI Consulting team and company information to clients who seek it
  5. \_\_\_/\_\_\_ Administrate follow-up with completed client projects to assess outcomes and any additional needs for services

**Comments:**

- C. \_\_\_/\_\_\_ **Internal Administration** (weighting is 20 to 40% of time)
1. \_\_\_/\_\_\_ Inbound/Outbound communications: E-mail and Telephone
    - a) \_\_\_/\_\_\_ Technology: demonstrate comfort and capability using DRIC's phone system, e-mail tools, web-based tools to communicate and work with others
  2. \_\_\_/\_\_\_ ACT Calendar
    - a) \_\_\_/\_\_\_ Keep current
    - b) \_\_\_/\_\_\_ Assist in the scheduling of events and appointments
  3. \_\_\_/\_\_\_ ACT Customer / Vendor Database
    - a) \_\_\_/\_\_\_ Enter your contacts and maintain them in ACT
    - b) \_\_\_/\_\_\_ Gain knowledge and utilize ACT to its fullest extent
  4. \_\_\_/\_\_\_ Document Development and Management (*ideally time billable to clients*)
    - a) \_\_\_/\_\_\_ Technology: demonstrate comfort and capability using your work station and web-based tools to work with others externally and internally
    - b) \_\_\_/\_\_\_ Produce letters, reports, agendas, lists, tables and other documents in appropriate software programs (e.g. Word, Adobe Acrobat, PowerPoint, FrontPage/ColdFusion/HTML, Excel)
    - c) \_\_\_/\_\_\_ Use internal experts as resources and tutors to produce documents
  5. \_\_\_/\_\_\_ Filing
    - a) \_\_\_/\_\_\_ Maintain hard copies (paper) in DRIC central files
    - b) \_\_\_/\_\_\_ Maintain systems files

**Comments:**

- D. \_\_\_/\_\_\_ **Direct Client Services** (weighting is 20-30% of ½ time = 4 to 6 hours)
1. \_\_\_/\_\_\_ Meet gross revenue collected goal, as defined with your supervisor
  2. \_\_\_/\_\_\_ Provide assessment, diagnosis and treatment/consultation to individuals, teams and organizations
    - a) \_\_\_/\_\_\_ Administer and interpret at least X personality assessment batteries per month
    - b) \_\_\_/\_\_\_ Interpret at least X group-wide assessment of personality and functioning per month
    - c) \_\_\_/\_\_\_ Lead at least X individual client projects per month
    - d) \_\_\_/\_\_\_ Lead at least X organization or team client projects per month
  3. \_\_\_/\_\_\_ Provide input into team servicing of client projects
  4. \_\_\_/\_\_\_ Assist in organizing and producing consulting materials for clients and DRIC staff

**Comments:**

- E. \_\_\_/\_\_\_ **Finance:** Participate in financial aspects of running DRIC
1. \_\_\_/\_\_\_ Lead client projects profitably
  2. \_\_\_/\_\_\_ Help identify new ways to generate revenue
  3. \_\_\_/\_\_\_ Help identify new ways to reduces expenses
  4. \_\_\_/\_\_\_ Maintain own projects financials in DRIC tools (Key financials- income, time tracking, QuickBooks.

- F. \_\_\_/\_\_\_ **Product Development:** Improving Existing and Producing New Products, Services, Processes, Tools and Methods for the Firm (weighting is 0% of time – **not done unless billable to clients.**)
1. Lead at least one major product or process for the firm (DRIC menu item, major project).  
For XYZ these are:
    - a) \_\_\_/\_\_\_
    - b) \_\_\_/\_\_\_
  2. \_\_\_/\_\_\_ Contribute to development teams lead by others

**Comments:**

- G. \_\_\_/\_\_\_ **Learning** to function effectively, efficiently and ethically as a trained consulting psychologist to individuals, groups and organizations (weighting is 10% dedicated time = 2 hours, 100% of time as learning by doing, especially at the beginning)
1. \_\_\_/\_\_\_ Complete formal training provided by DRI Consulting staff and identified professional associations
  2. \_\_\_/\_\_\_ Apply learning from training sessions to client work
  3. \_\_\_/\_\_\_ Identify areas of professional strength and weakness

**Comments:**

**Special Projects and Results This Past Year:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Comments:**

**Goals for This Coming Year: (What, Priority, By When):**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Comments:**

**II. Primary Report Relationship**

Graduate practicum student reports to Dr. John Fennig. Orientation and training supervision from Justin Anderson.

**Comments:**

### III. Competencies as a Post-doctoral level Consulting Psychologist – Division 13 and DRI Consulting Model

#### A) Primarily Individual-Level Core Competencies

- (1) \_\_\_/\_\_\_ Individual assessment for purposes of career and vocational assessment
- (2) \_\_\_/\_\_\_ Individual assessment for purposes of employee selection or development
- (3) \_\_\_/\_\_\_ Job analysis for purposes of individual assessment
- (4) \_\_\_/\_\_\_ Executive and individual coaching
- (5) \_\_\_/\_\_\_ Individual-level intervention for job and career-related problems

#### B) Primarily Group-Level Core Competencies

- (1) \_\_\_/\_\_\_ Group assessment
- (2) \_\_\_/\_\_\_ Assessment of the functional and dysfunctional group behavior
- (3) \_\_\_/\_\_\_ Assessment and development of teams
- (4) \_\_\_/\_\_\_ Creating group level teams in organizations (e.g., self-directed work groups)
- (5) \_\_\_/\_\_\_ Inter-group assessment and intervention
- (6) \_\_\_/\_\_\_ Group boundary assessment and intervention
- (7) \_\_\_/\_\_\_ Identity group (racial, gender, ethnic) management in the organizational context

#### C) Primarily Organizational/Systemic-Level Core Competencies

- (1) \_\_\_/\_\_\_ Organizational diagnosis including systemic assessment of the entire organization or large component parts of the organization
- (2) \_\_\_/\_\_\_ Attitude, climate, and satisfaction surveys
- (3) \_\_\_/\_\_\_ Evaluation of corporate management philosophy, organizational culture and nature of systemic stressors
- (4) \_\_\_/\_\_\_ Work-flow and project planning activities
- (5) \_\_\_/\_\_\_ Identification of aggregate performance measures
- (6) \_\_\_/\_\_\_ Assessment of organizational values and management practices
- (7) \_\_\_/\_\_\_ Organizational level interventions
- (8) \_\_\_/\_\_\_ Change management of organizational systems

**IV. On-going Education/Training Required**

**Training you successfully completed last year included:**

**Specific development needs for this year:**

(Also post in Learning - Staff Development\DRIC Staff Training\2001 DRIC Staff Training Needs)

**Comments:**

**IV. Compensation Summary**

Bonuses awarded last year: \$ \_\_\_\_\_  
Profit sharing allocated last year: \$ \_\_\_\_\_  
Days of professional training provided: \_\_\_\_\_  
Base increase this year: \_\_\_\_\_ % to \$ \_\_\_\_\_ annually.  
Other: (e.g. Academic Credit) \_\_\_\_\_

**V. Optional - Employee Comments**

Team Member Signature \_\_\_\_\_ Date \_\_\_\_\_

Reviewer(s) Signature(s) \_\_\_\_\_ Date \_\_\_\_\_