Revista Românească pentru Educație Multidimensională
ISSN: 2066-7329 | e-ISSN: 2067-9270
Abstracting & Indexing | Clarivate Analytics - Web of Science (WoS); EBSCO; Google Scholar; ICI Journals Master List - Index Copernicus; Ideas RePeC; Econpapers; Socionet; CEEOL; Philpapers; KVK; WorldCat; CrossRef; J-GATE

2025, Volume 17, Issue 2, pages: 500-523 | https://doi.org/10.18662/rrem/17.2/993
Submitted: April 4, 2025 | *Accepted for publication:* April 28, 2025

Evaluation of Charitable Organization Staff within the Framework of Career Advancement

Valentyna LITYNSKA [1]
Olha SOROKA [2]
Svitlana KALAUR [3]
Liudmila ROMANOVSKA [4]
Tetiana KRAVCHYNA [5,*]
Maryna VOLOSHENKO [6]

[1] PhD in Economics, Associate Professor of Marketing Department, Faculty of Economics and Management, Khmelnitsky National University, Khmelnitsky, Ukraine; https://orcid.org/0000-0001-9272-4118; litinskav@ukr.net
[2] Doctor of Pedagogical Sciences, Professor, Head of Department of Social Work and Management of Socio-Cultural Activities, Ternopil Volodymyr Hnatiuk National Pedagogical University, Ternopil, Ukraine; https://orcid.org/0000-0003-1483-8974; Sorokaolga175@gmail.com
[3] Doctor of Pedagogical Sciences, Professor, Department of Social Work and Management of Socio-Cultural Activities, Director of the Postgraduate Education Centre, Ternopil Volodymyr Hnatiuk National Pedagogical University, Ternopil, Ukraine; https://orcid.org/0000-0001-8099-9392; kalaur@tnpu.edu.ua
[4] Doctor of Pedagogical Sciences, professor of Social Work and Pedagogics Department, Humanities Faculty, Khmelnitsky National University, Khmelnitsky, Ukraine; https://orcid.org/0000-0001-7547-4575; Lroman@online.ua
[5] PhD in Psychology, Associate Professor, Department of Foreign Languages, International Relations and Law Faculty, Khmelnitsky National University, Khmelnitsky, Ukraine; https://orcid.org/0000-0001-8407-6667; tkravchyna@gmail.com
[6] Doctor of Pedagogical Sciences, Associate Professor, Professor of the Department of Psychology and Social Work, Odesa Polytechnic National University, Odessa, Ukraine; https://orcid.org/0000-0003-0940-3829; voloshenko@op.edu.ua
*corresponding author: tkravchyna@gmail.com

Abstract: *Effective employee evaluation is a key element of human resources management, especially in charitable organizations, where career development depends not only on professional competencies, but also on personal qualities, motivation and compliance with the mission of the organization. The study aims to develop a comprehensive practical methodology for assessing the effectiveness and potential of employees of non-profit structures with an emphasis on multidimensionality. The research combines theoretical analysis with empirical data collected from 264 Caritas Ukraine employees using a mixed approach: questionnaires, interviews, 360° feedback method, cluster analysis. The article analyzes the main approaches to personnel evaluation in charitable organizations, in particular, classical, competency-based, value-motivational, project-oriented, socio-psychological and adaptive. Key evaluation criteria are identified, including project effectiveness, financial resource mobilization, communication skills, leadership qualities, ability for self-development and level of social interaction. The study substantiates the feasibility of using a cluster method of personnel assessment, which enabled the formation of employee groups by competency and career levels and led to the development of a classification system that identifies leaders, experts, stable performers, newcomers and those requiring additional development. A phased assessment process is proposed, which includes goal setting, criteria selection, assessment implementation, feedback, career planning and ongoing monitoring. The results demonstrate that implementing the proposed system enhances charitable organizations' efficiency, supports career planning, boosts motivation and growth, and ensures mission-aligned use of human resources. The study offers recommendations for implementing comprehensive, multidimensional strategies aimed at enhancing personnel development within the charitable sector.*

Keywords: *professional competencies, personnel assessment, career development, methods, criteria, cluster method.*

How to cite: Litynska, V., Soroka, O., Kalaur, S., Romanovska, L., Kravchyna, T., & Voloshenko, M. (2025). Evaluation of charitable organization staff within the framework of career advancement. *Revista Românească pentru Educație Multidimensională, 17*(2), 500-523. https://doi.org/10.18662/rrem/17.2/993

©2025 Published by In Manifest Network in partnership with LUMEN Publishing. This is an open access article under the CC BY-NC-ND license http://creativecommons.org/licenses/by-nc-nd/4.0/

Introduction

Employee evaluation is an important tool for human resource management, especially in charitable organizations, where work efficiency depends not only on professional competencies, but also on involvement, motivation and compliance with the organization's mission. In such institutions, traditional management models need to be adapted to the specifics of their mission, limited resources and high social significance of results (Litynska et al., 2023).

In modern conditions, personnel assessment is becoming more complex. It records not only the level of achieved results, but also acts as an effective mechanism for identifying the potential of employees, forming individual development trajectories and building an effective career advancement system. This is especially relevant in the field of charity, because an employee's career is often viewed through the prism of expanding influence, increasing social contribution, expanding areas of responsibility, and not just formal career advancement (Larina, 2023).

Taking into account such variables as the level of professional competence, compliance with the values of the organization, the motivational sphere and the potential for development allows to form a flexible, adaptive personnel assessment system. Such a system will contribute not only to increasing the efficiency of employees, but also to the formation of transparent and fair mechanisms for career growth, which, in turn, ensures the sustainable development of the organization itself and the strengthening of its social impact.

The aim of the article is to develop effective practical approaches to evaluating the staff of charitable organizations in the context of their career advancement.

The objectives of the article are:

– analysis of existing approaches to personnel evaluation and substantiation of own vision of the concept of "assessing the staff of charitable organizations in the context of their career advancement";

– determination of the main goals of evaluating employees of charitable organizations in the context of their career advancement;

– development of an effective step-by-step methodology for evaluating the personnel of charitable organizations, which includes defining goals, criteria, evaluation methods, analyzing results and developing career development measures;

– determination of qualitative and quantitative criteria for evaluating personnel, reflecting the effectiveness of their activities;

– justification of the feasibility of using the cluster method for evaluating employees of charitable organizations;

– provision of practical recommendations for improving the system for evaluating the personnel of charitable organizations to increase their motivation, professional and career development and work efficiency.

Literature review

Voynarenko et al. (2020) rightly point out that personnel assessment allows to determine the level of motivation for innovative activities, which is also relevant for charitable organizations that often operate in conditions of non-standard challenges and require innovative approaches in working with people. Therefore, assessment not only records the fact, but also opens up opportunities for personnel development.

In addition, it is necessary to take into account the classical theories of motivation within the framework of organizational psychology. In particular, Maslow's hierarchy of needs allows to explain the motivation of employees of charitable organizations through higher levels of needs: social significance, belonging, self-actualization. These needs often have priority over material incentives in the non-profit sector (Buchynska, 2017). Herzberg's two-factor theory of motivation can also be useful for distinguishing hygiene factors (e.g., stability, working conditions) and motivational factors (job content, recognition, development), which is especially relevant when developing assessment systems (Sokolovska et al., 2019).

The analysis of the approaches of Maltyz & Tarasenko (2018) demonstrates that classical assessment methods (certification, competency-based approach, rating) remain effective if adapted to the specific conditions of the organization. The study adapted these approaches to the specifics of the charitable sector, focusing on the value correspondence of employees.

Didur (2021) emphasizes the importance of digital technologies that allow to automate assessment and make it more transparent. Within the framework of our study, this aspect was taken into account when forming the stages of the assessment methodology, in particular when determining the criteria that can be analyzed using digital systems.

The approach of Lobza & Shcherbyna (2018) to the application of KPIs has potential for charitable organizations. The study proves that key performance indicators can be adapted to socially oriented goals (for example, the number of volunteers involved, successfully implemented projects, the level of interaction with beneficiaries).

Additional attention in the theoretical justification of the evaluation of employees of charitable organizations is given to the theory of stakeholders. Within the framework of this theory, the effectiveness of an employee is considered through the prism of meeting the needs of key stakeholders – beneficiaries, donors, volunteers, local communities and partner structures. This approach allows not only to assess the individual contribution of an employee, but also to determine his/her ability to communicate, represent interests and form the social capital of the organization. Thus, the theory of stakeholders strengthens the connection between the results of the evaluation and the achievement of the mission of non-profit organizations.

Loiko (2014), Savchenko (2019), Syvolap & Halitsyna (2021) draw attention to the psychological aspects of assessment. The articles take these factors into account when forming assessment criteria that cover not only productivity, but also emotional state, job satisfaction, and a sense of belonging to the organization's mission.

Foreign experience presented by Gravina et al. (2021), Johennesse & Chou (2017) indicates the significant role of evaluation systems in forming an effective team and retaining talented employees. These findings confirm the feasibility of implementing a clear personnel evaluation system even in the non-profit sector.

The work of Korneschuk & Matsenko (2023) reveals the importance of assessing, selecting, and developing the staff of social organizations, taking into account professional reliability as a basic criterion. The researchers emphasize that the combination of objective and subjective indicators allows for a more accurate picture of the potential of employees and making informed decisions regarding their career growth.

According to the study by the Zagoriy Foundation (2023), the problem of professional burnout in the non-profit sector is directly related to the lack of clear mechanisms for assessment and feedback. This indicates the need for systematic assessment of personnel as one of the elements of the prevention of emotional exhaustion. Another study by the Zagoriy Foundation (2022) shows how in wartime conditions charitable organizations change their approaches to personnel management, in particular, they focus on flexibility, adaptability and maintaining motivation, which further emphasizes the importance of assessment for career development in crisis conditions.

Ambilichu et al. (2024) prove that a qualitatively organized appraisal process directly affects the level of employee commitment to the organization, especially in cases where the appraisal is combined with the development of career opportunities.

Islam (2023) highlights the role of organizational commitment as a mediator between appraisal and performance, which is relevant for creating an effective human resource management system in the charitable sector.

Gadzali (2023) notes that the combination of appraisal, career planning and staff involvement creates conditions for increasing organizational commitment, which can be integrated into the practice of charitable organizations to support sustainable staff development.

Waladali (2022) emphasizes the importance of an effective results management system that forms affective commitment of employees through participation in appraisal processes. This creates the basis for long-term development and retention of staff in the charitable sector.

Therefore, the research conducted is a logical continuation and development of existing approaches, but it has its own uniqueness, as it focuses on career advancement in charitable organizations – an aspect that remains under-researched.

Methodology

The article uses a comprehensive approach to evaluating the personnel of charitable organizations. To analyze existing approaches to evaluating personnel and substantiate own vision of the concept of "assessing the personnel of charitable organizations in the context of their career advancement", theoretical methods were used, namely: analysis and generalization of scientific literature.

To determine the main goals of evaluating employees of charitable organizations in the context of their career advancement, the analysis method was applied.

The main study is based on a mixed empirical approach, combining quantitative and qualitative methods. Research period: March 2024 – February 2025. The object was the employees of the network of the charitable organization "Caritas of Ukraine", which has more than 1,200 people.

Sample: 264 employees participated in the study.

Inclusion criteria: work experience of more than 6 months, participation in the implementation of projects or coordination of volunteer activities, written consent to participate.

Exclusion criteria: employees with experience of less than 6 months, lack of involvement in operational or management activities, refusal to participate.

Demographic characteristics of the sample: participants aged 23 to 58 years, 71% – women, 29% – men. Employees from the departments of project

management, communications, finance, volunteer coordination, etc. are represented.

Data collection methods:

– quantitative methods: structured questionnaires (paper and electronic), Likert scale (1–5);

– qualitative methods: interviews, focus groups, open-ended questions in questionnaires.

To increase objectivity, the 360° feedback method was used. The repeatability of responses confirmed the sufficiency of the sample for in-depth analysis.

Data analysis: employees were grouped using cluster analysis, which allowed to identify five types: leaders, experts, stable performers, beginners and employees who need development.

Therefore, this approach ensures objectivity of assessment, individualization of career trajectories and meets modern requirements for a system of multidimensional education and personnel management in the social sector.

During the development of an effective step-by-step methodology for evaluating the personnel of charitable organizations, which includes determining goals, criteria, methods of evaluation, analyzing results and developing measures for career development, the cluster method was applied.

To reduce potential bias associated with self-evaluation, the survey was supplemented with expert assessments of managers and elements of 360-degree feedback, which increased the objectivity of the results obtained.

Results

Evaluation of personnel in charitable organizations, viewed through the lens of career advancement, serves as a key human resource development mechanism that enhances work efficiency, motivates employees and fosters professional growth in accordance with the organization's mission, values and the unique characteristics of career development in the nonprofit sector (Naumenko et al., 2024).

Analysis of scientific literature has allowed to identify the following approaches (Buchynska, 2017):

– classical approach. Assessment is carried out according to generally accepted criteria of labor productivity, competence, responsibility and efficiency of performance of official duties. Career advancement is based on the results of regular certification, assessment of performance indicators;

– competency-based approach. The emphasis is on assessing professional and personal competencies necessary for successful work in the

charitable sector (emotional intelligence, stress resistance, communication skills, ability to cooperate). Promotion occurs according to the level of development of competencies corresponding to higher positions;

– value-motivational approach. The assessment is based on the employee's compliance with the mission and values of the organization, his/her motivation and involvement in socially significant activities. Career advancement depends on the level of personal dedication, initiative and contribution to the development of the organization;

– project-oriented approach. The employee's effectiveness is assessed on the basis of his/her participation in the implementation of charitable projects, level of responsibility, ability to attract resources and establish partnerships. Career growth occurs through the expansion of functional responsibilities and involvement in management processes;

– socio-psychological approach. The assessment takes into account the level of interaction of the employee with the team, the ability to empathize, the effectiveness of communication and the level of support of the social environment. Promotion is possible subject to high social integration, leadership qualities, and trust from colleagues;

– flexible (adaptive) approach. It involves individual assessment of employees depending on their contribution, working conditions and personal circumstances. Career growth can occur not only vertically (occupying higher positions), but also horizontally (expanding responsibilities, new roles in projects).

Thus, employee evaluation and career advancement may have different emphases depending on the organization's mission, its strategic goals, and the specifics of its activities.

Considering the positive aspects of the above approaches and the peculiarities of the functioning of charitable organizations, it is advisable to consider the evaluation of employees of charitable organizations in the context of their career advancement as a process of systematic analysis and determination of the competencies and contribution of employees to achieving the social mission of the organization, the results of which contribute to making decisions on career development, increasing or expanding the role of employees within the organization, ensuring their long-term motivation and effectiveness (Ugoani, 2021).

Personnel evaluation in charitable organizations is an important human resources management tool that contributes to the effective development of employees' career growth (Ahaverdiieva, 2019). Considering the peculiarities of the functioning of charitable organizations, it is necessary

to determine the main goals of evaluating the personnel of charitable organizations (Figure 1):

– determination of professional level. Assessment helps to identify the level of competence of employees, their strengths and weaknesses, which allows to determine potential areas of development and training;

– identification of leadership qualities. Identification of employees who have management skills, motivation for management activities and the ability to make responsible decisions;

– motivation for professional development. Providing employees with feedback on their work helps to increase their interest in professional growth and improvement of qualifications;

– career advancement planning. Assessment allows to develop individual career plans, to determine the paths of promotion and the competencies necessary for this;

– increasing the efficiency of the organization. Determining the potential of employees and their suitability for the position contributes to the effective use of human resources and increasing the productivity of the charitable organization;

– identifying the needs for training and development of employees. Analysis of the assessment results allows the organization to determine the areas of necessary training and development of personnel to increase the overall competence of the team;

– increasing the level of involvement and loyalty of employees. Systematic assessment and development of personnel contributes to the creation of a favorable working environment, which has a positive impact on the motivation and retention of personnel in the charitable sector.

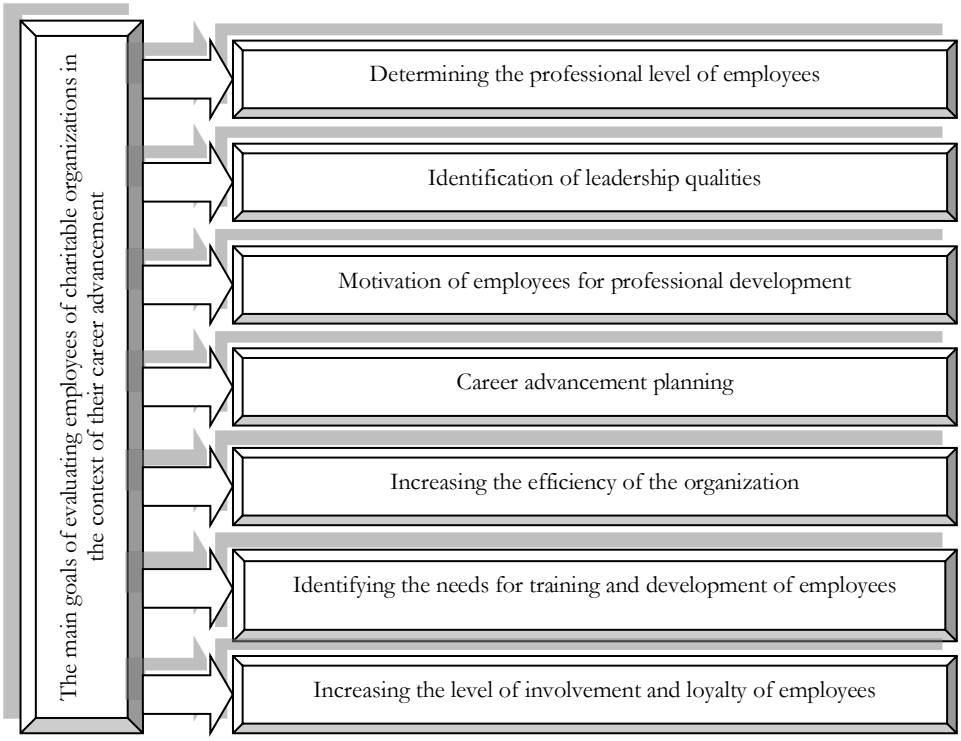


Figure 1. The main goals of evaluating employees of charitable organizations in the context of their career advancement (created by the authors)

Thus, personnel evaluation is a key factor in ensuring the professional and career growth of employees of charitable organizations, which contributes to increasing the effectiveness of their activities and achieving the mission of the organization.

Evaluation of employees of charitable organizations in the context of their career advancement is an important tool for personnel development and increasing the effectiveness of the organization (Wolf, 2023). The process of evaluating employees of charitable organizations in the context of their career advancement should be considered in the following stages (Figure 2):

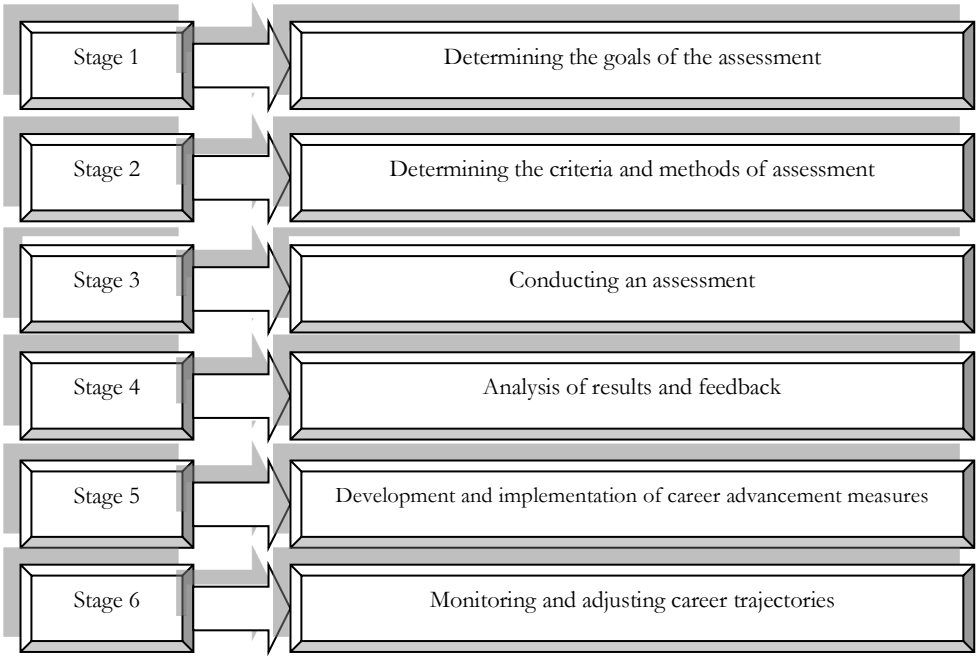


Figure 2. The process of evaluating employees of charitable organizations in the context of their career advancement (created by the authors)

Stage 1. Determining the goals of the assessment. At this stage, management and HR–service formulate the goals of the assessment:

– identifying the potential of employees for career growth;

– assessing the compliance of employees' competencies with the requirements of the positions;

– identifying training and development needs;

– motivating staff through feedback and career advancement prospects.

Stage 2. Determining the criteria and methods of assessment. At this stage, key performance and competency criteria that will be assessed are formed.

To determine the criteria and methods for assessing employees of charitable organizations in the context of their career development, a corresponding study was conducted, which was based on conducting a questionnaire. In particular, within the framework of the specified study, a survey of 264 employees of charitable organizations was conducted, which contributed to increasing the accuracy of the results obtained. A significant sample size ensured their reliability and representativeness (Table 1).

Table 1. Fragment of a questionnaire for determining criteria and methods for evaluating employees of charitable organizations in the context of their career development

№	Question	Answer option
1	What is your job title?	
2	What skills do you think are most important for a successful career in a charitable organization?	
3	Does your organization have clear criteria for evaluating employee performance?	
4	Does your organization have a career development program for employees?	
5	What methods of employee evaluation do you find most effective?	
6	What changes do you think could improve the evaluation and career development system in a charitable organization?	

The obtained results allowed to identify the following relevant criteria, which received positive responses from more than 50% of respondents (Table 2).

Table 2. Main criteria for employee evaluation

Qualitative criteria (Soft Skills)	*Quantitative criteria (Hard Skills, KPI)*
Leadership qualities – the ability to take responsibility, motivate the team and make strategic decisions.	Project performance – the number of successfully implemented initiatives and their social impact.
Teamwork – effectiveness in interaction with colleagues, volunteers, partners.	Resource engagement – the amount of grants, donor funds, and partner support attracted.
Ability for self-development – active participation in trainings, educational programs, mentoring for new employees.	Volunteer and partner mobilization – the number of new volunteers and partner organizations.
Communication skills – the ability to establish partnerships, effectively present projects.	Compliance with deadlines and planned indicators – completion of tasks within established deadlines.
Adaptability and stress resistance – the ability to work in conditions of change, respond quickly to challenges.	Quality of reporting and financial management – effective use of resources in accordance with the budget.
Creativity and initiative – contribution to the development of new social projects, search for non-standard solutions.	Peer review rating – helps assess team interaction, professional and personal qualities of an employee from the perspective of his colleagues

As for the methods of evaluating employees of charitable organizations in the context of their career advancement, they should include a comprehensive approach by Hindayanti et al. (2024):

– self-assessment – employees analyze their own effectiveness;

– management assessment – managers evaluate subordinates according to established criteria;

– 360-degree feedback – the opinion of colleagues, subordinates, and managers is taken into account;

– analysis of achievements and results of projects – contribution to the implementation of social initiatives is assessed;

– cluster method – allows charitable organizations to systematically approach personnel development, using data analysis to make informed decisions. This contributes to the effective career advancement of employees and increasing the overall performance of the organization.

Since the assessment of personnel in charitable organizations has its own characteristics, in this case the effectiveness of their work is measured by social influence, communication skills and the ability to attract resources. Accordingly, the use of the cluster method in the assessment allows to group employees according to similar characteristics, which helps to identify their strengths, development areas and potential career paths.

The cluster method involves grouping employees according to similar characteristics (competences, motivation, etc.) based on the analysis of their activities. This allows:

– to identify groups with different levels of efficiency;

– to determine training and development needs;

– to form a personnel reserve;

– to optimize the distribution of responsibilities.

In accordance with the specified criteria, clusters were formed for grouping employees of charitable organizations according to the results of the assessment (Figure 3).

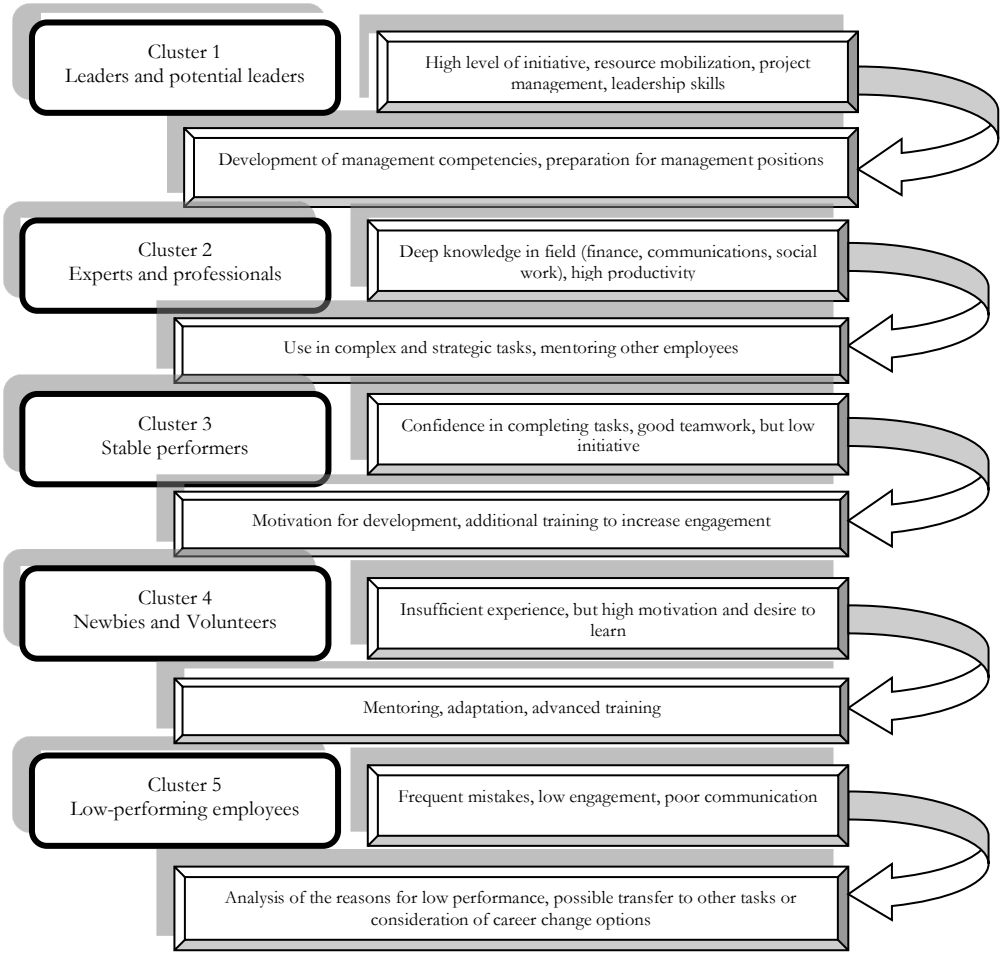


Figure 3. Clusters identified for assessing employees of charitable organizations in the context of their career advancement (created by the authors)

Stage 3. Conducting the assessment. At this stage, information is collected, which should include questionnaires, interviews, testing, and reviewing reports on the work performed. It is important to ensure the objectivity of the assessment and avoid subjective biases.

Stage 4. Analysis of results and feedback. The assessment results are analyzed and discussed with employees. During the feedback:

– employees receive a detailed assessment of their strengths and weaknesses;

– directions for further professional development are determined;

– individual career growth plans are agreed upon.

Stage 5. Development and implementation of career advancement measures.

After conducting a personnel assessment, decisions are made regarding possible career advancement:

1. Employees with a high level of competence – receive recommendations for promotion to higher positions, expansion of responsibilities or participation in management development programs.

2. Employees with potential for development – are involved in advanced training programs, mentoring or special training to prepare for future career growth.

3. Employees who need improvement - receive recommendations for additional training, mentoring or transfer to other positions where their skills will be used more effectively.

4. Employees who do not meet the requirements – in case of low assessment results, correction programs or a review of employment relations may be offered.

Decision-making on career advancement is based on a comprehensive analysis of assessment results, taking into account organizational needs and individual career aspirations of employees. The decision-making process may involve department heads, the HR department, and employees themselves through a feedback system.

Stage 6. Monitoring and adjusting career paths.

Career advancement is a dynamic process, so it is necessary to regularly review the results of employees' work, analyze their development and adjust HR strategies in accordance with changes in the organization and the labor market.

Thus, systematic personnel assessment helps charitable organizations effectively manage human resources, motivate employees and create favorable conditions for their career growth.

To verify the reliability of the proposed approach to the process of assessing employees of charitable organizations in the context of their career advancement, a corresponding study was conducted among the staff of the charitable organization "Caritas of Ukraine". Caritas of Ukraine is a comprehensive organization that unites national offices in Kyiv and Lviv and a network of regional (diocesan) organizations located in different regions of Ukraine. The charitable organization "Caritas of Ukraine" has over 1,200 employees and volunteers.

In accordance with the defined criteria for evaluating employees of charitable organizations for clustering, lists of qualitative and quantitative criteria are provided (Tables 3 and 4).

Table 3. Qualitative criteria for employee evaluation

№	Qualitative assessment criteria
1	Leadership qualities (points)
2	Teamwork (points)
3	Self-development ability (points)
4	Communication skills (points)
5	Adaptability and stress resistance (points)
6	Creativity and initiative (points)

Table 4. Quantitative criteria for employee evaluation

№	Quantitative evaluation criteria
1	Project performance (per year)
2	Resource involvement (in thousands of UAH)
3	Volunteers involved (persons)
4	Completion of tasks within the established deadlines (points)
5	Effective use of resources (points)
6	Rating based on peer feedback (points)

To assess the most criteria, it is advisable to use a score scale from 1 to 5, where:

1 - low level (requires significant improvement);

5 - high level (meets or exceeds expectations).

After analyzing the reports and interviewing the management, the following data were obtained for the selected 15 employees (Tables 5 and 6).

Table 5. Data obtained on qualitative criteria for evaluating specific employees of the charitable organization "Caritas of Ukraine"

Employee	Leadership qualities (points)	Team-work (points)	Ability for self-development (points))	Communication skills (points)	Adaptability and stress resistance (points)	Creativity and initiative (points)
Respondent 1	4,2	3,8	4,7	4,9	4,7	3,9
Respondent 2	4,4	4,7	5,0	4,8	5,0	4,7
Respondent 3	4,0	3,7	4,9	3,7	3,6	3,7
Respondent 4	3,8	2,7	3,6	4,3	3,8	3,6
Respondent 5	2,9	2,3	4,6	4,6	3,9	4,6
Respondent6	1,3	0,4	2,3	1,8	0,7	1,4
Respondent 7	0,9	2,8	1,9	1,7	2,8	2,7
Respondent 8	4,3	3,7	3,8	3,8	4,6	3,9
Respondent 9	5,0	5,0	4,4	5,0	4,7	4,5
Respondent 10	4,4	3,9	4,8	4,1	4,8	4,9
Respondent 11	0,6	0,9	1,3	0,5	0,7	0,9
Respondent 12	2,6	2,9	2,7	2,8	2,9	3,2
Respondent 13	2,7	3,5	3,8	2,7	3,7	3,9
Respondent 14	4,7	3,7	4,3	4,8	4,6	4,7
Respondent 15	2,9	2,8	2,6	2,7	3,3	2,8

Table 6. Data obtained on quantitative criteria for evaluating specific employees of the charitable organization "Caritas of Ukraine"

Employee	Project performance per year (pcs.)	Attracting resources (thousands of UAH)	Involvement of volunteers (persons)	Completion of tasks within the established deadlines (points)	Efficient use of resources (points)	Rating by peer reviews (points)
Respondent 1	12	570	47	4,9	5,0	4,8
Respondent 2	11	530	50	4,7	4,3	4,6
Respondent 3	7	301	29	3,9	3,7	4,1
Respondent 4	8	328	32	3,8	4,1	3,8
Respondent 5	8	297	30	4,0	3,8	4,3
Respondent6	2	53	11	1,7	0,9	1,1
Respondent 7	3	48	10	1,8	1,4	1,2
Respondent 8	7	312	31	3,5	3,3	3,9
Respondent 9	11	487	49	4,8	4,9	4,7
Respondent 10	11	492	47	4,9	4,6	4,8
Respondent 11	1	23	3	0,5	1,1	0,4
Respondent 12	4	108	20	2,9	3,1	2,4
Respondent 13	7	286	31	3,8	3,2	3,4
Respondent 14	10	514	52	4,9	4,2	4,0
Respondent 15	5	112	19	2,8	2,3	2,6

Next, it is necessary to determine the average score for each employee. The formula for calculating the average score is:

$X_s = \sum X_i/n$, where

X_s – average score;

X_i – evaluations for each defined criterion;

n – number of ratings.

Based on the calculations performed, the following clusters can be formed for specific employees of a charitable organization (Table 7).

Table 7. Clusters formed for some employees of the charitable organization "Caritas of Ukraine" based on the results of the assessment

Cluster	Employees	Characteristic	Recommendations
Cluster 1 – Leaders and Potential Leaders	Respondents 1, 2, 9, 10, 14	High activity in projects, strong leadership, involvement of significant resources	Preparation for promotion, mentoring of other employees
Cluster 2 – Experts and Professionals	Respondents 3, 4, 5, 8, 13	High qualification, deep knowledge in the field, effective performance of tasks	Participation in strategic projects, teaching or mentoring opportunities
Cluster 3 – Stable Performers	Respondents 12, 15	Good performance, but without leadership potential	Additional training, involvement in more responsible tasks
Cluster 4 – Beginners and Volunteers	Respondents 6,7	Insufficient experience, but high motivation and desire to learn	Adaptation programs, training, gradual involvement in key tasks
Cluster 5 – Employees in Need of Development	Respondents 11	Low performance, weak initiative	Individual development plan, mentoring, possible change of work direction

Since the study data were collected at a single time, the cluster distribution only reflects the current situation. Further research using a longitudinal approach will allow to test the stability of the identified clusters over time, as well as to analyze more deeply the dynamics of the relationship between performance appraisal and employee career advancement.

Next, it is necessary to implement the identified recommendations.
For leaders (Respondents 1, 2, 9, 10, 14):
– to appoint curatorship over new projects;
– to include in the development program for future leaders;
– to involve in strategic planning.
For experts and professionals (Respondents 3, 4, 5, 8, 13):
– to appoint them as mentors for newcomers and volunteers;
– to involve in the analysis and optimization of existing processes;
– to include in initiatives to improve professional standards.
For stable performers (Respondents 12, 15):
– to offer leadership training and attract funding;
– to provide more responsibility in projects.
For newcomers and volunteers (Respondents 6,7):

– to provide support from mentors from among the leaders;

– to include in adaptation programs for faster mastering of work processes.

For those who need development (Respondents 11):

– to assign a mentor from among the leaders;

– to develop a personalized training program;

– to conduct a motivational interview regarding career growth.

In addition, one of the main conditions for evaluating employees of charitable organizations is their further career development. Table 8 presents a real example of a compiled career development plan for an employee of the charitable organization "Caritas of Ukraine".

Table 8. Career development plan for an employee in a charitable organization

General information
Employee: Respondent 1
Current position: Volunteer Coordinator
Plan date: 01/29/2025
Prospective position: Project Manager
Assessment of the current level of competencies
Strengths: 1. High level of communication skills. 2. Experience working with volunteers and partners. 3. Organization of charitable events. 4. Ability to work in a team.
Areas of development: 1. Insufficient experience in financial planning and budgeting. 2. Limited understanding of strategic project management. 3. The need to improve reporting skills and work with donors.
After 12 months - to receive a promotion to the position of Project Manager with expanded functionality, including management of charitable initiatives, attracting grant funding and strategic development of programs.
Success criteria and evaluation of results
1. Obtaining a new grant or funding (with the participation or initiative of respondent 1). 2. Organizing at least one successful social project. 3. Improving financial planning and budgeting skills (according to management feedback). 4. Passing certification or courses in project management. 5. Receiving positive feedback from the team and managers.
Final decision
1. After 12 months, based on the results of the assessment, a decision will be made on a possible promotion to the position of Project Manager. 2If necessary, adjust the plan and continue training in the necessary areas.

It is also possible to identify key stages of development for an employee of the charitable organization "Caritas of Ukraine" (Table 9).

Table 9. Key stages of development of an employee of the charitable organization "Caritas of Ukraine"

Stage	Deadline	Actions to achieve	Expected result
Developing management skills	1-3 months	1. To complete project management training. 2. To participate in management meetings.	Increasing the strategic vision of the organization's work
Mastering financial management	3-6 months	1. To complete a course in budgeting and financial management. 2. To assist in preparing a budget for one of the projects.	Training in the basics of working with grant funds
Attracting funding and partners	6-9 months	1. To participate in writing grant applications. 2. To establish contacts with new potential donors.	Obtaining the first funding through an independent initiative
Project management practices	9-12 months	1. To independently organize a charity event. 2. To coordinate a team of volunteers and be responsible for the implementation of the project.	Proven ability to manage projects and teams

Such a career plan allows not only to develop the employee's key competencies, but also to prepare him/her for a new role in the organization. It is flexible and provides for regular progress assessment, which helps the employee to move purposefully towards promotion.

Thus, the cluster method will allow the charitable organization to objectively assess the staff, identify potential leaders, effective performers and employees who need additional support. This allows for rational allocation of resources, stimulation of employee development and formation of a personnel reserve.

Limitations and discussions

The study of the problems of evaluating employees of charitable organizations in the context of their further career development identifies certain features and limitations:

1. Sampling limitations and representativeness. As Korneschuk & Matsenko (2023) point out, the effectiveness of evaluation in social organizations largely depends on the context, organizational culture, and scale of the institution. In this study, the focus was on the extensive Caritas Ukraine network, a large and structured charitable organization. As a result, the

findings may not be fully generalizable to smaller or international charitable organizations that operate under different conditions and resources.

2. The problem of staff self-assessment. Ambilichu et al. (2024) point out that staff evaluation based only on self-assessment can be biased. In our study, this was compensated for by the introduction of 360-degree feedback and manager assessments.

3. The balance between qualitative and quantitative criteria. Hadi & Mitra (2017), Lobza & Shcherbyna (2018) raise the problem of the balance between KPIs and soft skills in the evaluation system. It remains debatable: what is more important - social impact or the amount of resources involved.

4. The impact of assessment on motivation. Islam (2023) proves that the employee's organizational commitment is a mediator between assessment and performance. Similarly, Gadzali (2023) argues that effective assessment combined with career planning increases organizational commitment.

5. Digitalization of assessment processes. Didur (2021) emphasizes the importance of digital tools in staff assessment, which allows making processes more transparent and less subjective. In the future, it is necessary to explore the role of HR analytics, automated platforms and AI in the charitable sector.

6. Long-term effectiveness of the cluster method. Although Ahaverdiieva (2019) substantiates the effectiveness of comprehensive assessment, staff clustering, as a method, still needs to be tested in dynamics. This confirms the relevance of longitudinal studies.

7. International comparisons. Gravina et al. (2021) and Johennesse & Chou (2017) have shown that in an international context, assessment systems are key to talent retention. This indicates the need for cross-cultural analysis to adapt best practices to Ukrainian realities.

Regarding discussions and prospects for further research, the following remains debatable:

– issues regarding the balance between quantitative (financial indicators, productivity) and qualitative (emotional intelligence, communication skills) criteria for evaluating employees of charitable organizations;

– the impact of evaluation on staff motivation. Further study is needed to determine how different approaches to evaluation affect employee motivation and the level of their burnout;

– adaptation of evaluation models for international charitable organizations. The study can be expanded to analyze personnel evaluation practices in international organizations to compare their effectiveness;

– integration of digital technologies into the evaluation process. A promising direction is to study the possibilities of using HR analytics, artificial intelligence and automated systems in the process of personnel assessment;

– the long-term impact of assessment on career growth. Further analysis is needed of how regular staff assessment contributes to their career development over a long period.

The proposed discussion questions indicate the need for further research that will allow to improve the system of assessment of employees of charitable organizations and increase its effectiveness.

Conclusions

Employee evaluation of charitable organizations is a key element of the personnel management system, which not only ensures increased efficiency, but also contributes to increased motivation, professional and career development of employees. In the specific conditions of the charitable sector, where material incentives are often of secondary importance, approaches focused on values, involvement and social mission of employees become particularly relevant.

The study has confirmed the feasibility of a comprehensive approach to personnel appraisal, which includes classical, competency, value-motivational, project-oriented, socio-psychological and adaptive components. Such an approach allows for a more complete coverage of both objective and subjective aspects of personnel activities, which is critically important for ensuring the effective functioning of a charitable organization.

The proposed use of the cluster method for grouping employees by their level of competence, efficiency and career growth potential has made it possible to identify five main categories of personnel: leaders, experts, stable performers, newcomers and employees who need additional development. This creates the prerequisites for individualizing career trajectories, increasing employee motivation and more rational allocation of resources.

A separate, step-by-step methodology for personnel assessment has been developed, which includes: defining assessment goals; forming criteria and choosing methods; analyzing the results obtained; providing feedback; planning career development; monitoring the dynamics of professional growth.

The results of the study are of practical importance for improving the personnel assessment system of charitable organizations. The proposed recommendations allow optimizing personnel policy, ensuring the effective use of human potential and strengthening the implementation of the social mission of organizations.

Prospects for further research include: analysis of the long-term impact of assessment systems on the career development of employees; implementation of inter-rater reliability testing for qualitative assessment criteria; expansion of the sample at the international level and conducting cross-cultural comparative studies; integration of digital technologies into personnel assessment processes; comparative analysis of assessment practices in international and Ukrainian charitable organizations to identify best practices and their adaptation to local conditions.

References

Ahaverdiieva, Kh. (2019). Comprehensive staff evaluation. SHS *Web of Conferences 67,* 06002. http://dx.doi.org/10.1051/shsconf/20196706002

Ambilichu, C. A., Akaighe, G. O., & Pepple, D. G. (2024). Performance appraisal process as a determinant of employee commitment: A serial mediation analysis. *Journal of Organizational Effectiveness: People and Performance*. https://doi.org/10.1108/JOEPP-07-2023-0273

Buchynska, T. V. (2017). Otsinka personalu yak vazhlyvyi element efektyvnoho upravlinnia [Personnel evaluation as an important element of effective management]. *Ekonomika ta upravlinnia pidpryiemstvamy [Economics and Business Management] 1* (57), 59–64. http://nbuv.gov.ua/UJRN/PSPE_print_2017_1_12

Didur, K. M. (2021). Suchasni metody otsinky personal [Modern methods of personnel evaluation]. *Efektyvna ekonomika [Effective economy]*. http://www.economy.nayka.com.ua/?op=1&z=776.

Gravina, N., Nastasi, J. & Austin, J. (2021). Assessment of Employee Performance. *Journal of Organizational Behavior Management, 41 (*2), 124–149. https://doi.org/10.1080/01608061.2020.1869136

Gadzali, S. S. (2023). The review of organizational commitment: the effects of performance assessment, career planning, and employee's participation. *Jurnal Penelitian Pendidikan Indonesia, 9*(3), 1457-1464. https://doi.org/10.29210/020232177

Hadi, A., Mitra, R. (2017). Management and evaluation of staff performance based on new evaluation structures. *Betriebswirtschaftliche Forschung und Praxis, 7(*2), 88–109. http://dx.doi.org/10.21859/bfup-07027

Hindayanti, H., Septiani, W., & Maulidya, R. (2024). Employee Performance Assessment Model in Survey Service Companies Using Analytical Hierarchy Process and Naive Bayes. *Spektrum Industri*, *22* (1), 36–50. https://doi.org/10.12928/si.v22i1.150

Islam, Q. (2023). Mediating role of organizational commitment between performance appraisal and employee performance: a study of Saudi

Arabian employees. *European Economic Letters, 13* (3), 1528-1536. https://www.eelet.org.uk/index.php/journal/article/view/455

Johennesse, Lee-Anne C., & Chou, Te-Kuang. (2017). Employee perceptions of talent management effectiveness on retention. *Global Business and Management Research. Boca Raton, 9* (3), 46–58. http://gbmrjournal.com/pdf/vol. 9 no. 3/V9N3-4.pdf

Korneschuk, V. V., Matsenko, I. V. (2023). Otsinka, dobir ta rozvytok personalu sotsialnoi orhanizatsii na zasadakh profesiinoi nadiinosti [Assessment, selection and development of social organization personnel based on professional reliability]. *Naukovyi visnyk Uzhhorodskoho universytetu. Seriia: «Pedahohika. Sotsialna robota» [Scientific Bulletin of Uzhhorod University. Series: "Pedagogy. Social Work"], 2* (53), 67–70. https://doi.org/10.24144/2524-0609.2023.53.67-70

Larina, N. (2023). Professionalization and professional and career growth of public servants: challenges and prospects. *Public Administration and Regional Development, 19,* 239–257. https://doi.org/10.34132/pard2023.19.12

Litynska, V., Kondratska, L., Romanovska, L., Kravchyna, T., Chagovets, A., & Kalaur, S. (2023). Career planning of scientific-pedagogical personnel in higher education institutions. *European Journal of Sustainable Development*, *12* (4), 437. https://doi.org/10.14207/ejsd.2023.v12n4p437

Lobza, A. V., Shcherbyna, K. V. (2018). Rozrobka systemy otsinky personalu pidpryiemstva: realizatsiia pidkhodu KRI [Development of an enterprise personnel evaluation system: implementation of the KPI approach]. *Molodyi vchenyi [Young scientist], 12* (64), 291–295.

Loiko, I. H. (2014). Analiz suchasnykh metodiv otsiniuvannia personal [Analysis of modern personnel evaluation methods]. *Zbirnyk naukovykh prats UkrDAZT [Collection of scientific papers of the Ukrainian State University of Railway Transport], 146*, 129–135.

Maltyz, V. V., Tarasenko, Yu. V. (2018). Otsinka personalu: suchasni metody ta instrumenty yii provedennia [Personnel assessment: modern methods and tools for its implementation]. *Ekonomika i suspilstvo [Economy and society], 19,* 484–489. https://economyandsociety.in.ua/journals/19_ukr/73.pdf.

Naumenko, N., Kozlov, A., Palevych, S., Denysenko, A., Tverdokhlib, T., & Bashkir, O. (2024). Advancing the Career Development for Future Primary School Teachers in Ukraine: New Neuropedagogical Challenges. *Revista Romaneasca Pentru Educatie Multidimensionala*, *16*(4), 29-51. https://doi.org/10.18662/rrem/16.4/906

Savchenko, V. A. (2019). Psykholohichni aspekty otsinky ta atestatsii personal [Psychological aspects of personnel assessment and certification]. *Praktychna psykholohiia ta sotsialna robota [Practical psychology and social work], 5,* 22–29.

Syvolap, L. A., Halitsyna, A. O. (2021). Doslidzhennia suchasnykh metodiv otsinky personal [Research on modern methods of personnel evaluation]. *Effective economy [Effective economy],* [Online], *11*. https://www.doi.org/10.32702/2307-2105-2021.11.24

Sokolovska, V. V., Babchynska, O. I., Ivanchenko H. V. (2019). Metody otsinky personalu: rol ta znachennia v upravlinni [Personnel assessment methods: role and importance in management]. *Ahrosvit [Agrosvit], 20,* 93–98. https://doi.org/10.32702/2306-6792.2019.20.93

Ugoani, J. O. (2021). Performance appraisal and its effect on employees' productivity in charitable organizations. *Business, Management and Economics Research, 6* (12), 166–175. https://www.econbiz.de/Record/performance-appraisal-and-its-effect-on-employees-productivity-in-charitable-organizations-ugoani-john/10013237320

Voynarenko, M., Dzhedzhula, V. & Yepifanova, I. (2020). Modeling of the Process of Personnel Motivation for Innovation Activity. *WSEAS Transactions on Business and Economics*, *17,* 467–477. https://doi.org/10.37394/23207.2020.17.45.

Waladali, E. (2022). The impact of perceived effectiveness of performance management system on affective commitment: employee participation as a moderator. *Problems and Perspectives in Management*, *20*(1), 514–531. https://doi.org/10.21511/ppm.20(1).2022.41

Wolf, L. (2023). Performance evaluation: A tool for retention. *National Council of Nonprofits.* https://www.councilofnonprofits.org/articles/performance-evaluation-tool-retention

Zagoriy Foundation. (2022). *Blahodiinist u chasy viiny [Charity in times of war]*. https://zagoriy.foundation/doslidzhennya-blagodijnist-u-chasi-vijni-vid-zagoriy-foundation/

Zagoriy Foundation. (2023). *Profesiine vyhorannia pratsivnykiv nekomertsiinoho sektoru [Professional burnout of employees in the non-profit sector]*. https://zagoriy.foundation/publications/doslidzhennya-profesijne-vigorannya-pracivnikiv-nekomercijnogo-sektoru/