

UNIVERSITY MEDICAL CENTER

PERFORMANCE MANAGEMENT PROGRAM  
JOB DESCRIPTION/PERFORMANCE APPRAISAL FORM

PART I - GENERAL JOB/PERFORMANCE INFORMATION

|  |                                  |
|--|----------------------------------|
| <b>Employee Name:</b>                                  |                                  |
| <b>Job Title:</b> Training Chief/ Staffing Coordinator |                                  |
| <b>Position Reports To:</b> EMS Administrative Council |                                  |
| <b>Department:</b> Emergency Medical Services          | <b>Exempt/Non-Exempt:</b> Exempt |
| <b>Job Description Effective Date:</b> February, 2005  |                                  |
| <b>Performance Appraisal Period:</b>                   |                                  |

JOB SUMMARY:

Coordinates, implements, and monitors effective and comprehensive quality improvement program for the EMS department. Acts as a liaison with EMS providers, and hospitals for quality improvement, and trauma issues as assigned. Collects, analyzes, and presents data required for monitoring quality improvement indicators and standards for EMS pre-hospital personnel, providers and hospitals for the EMS system. Assesses actual or potential problems and refers to appropriate levels of action. Performs case review from data collected at least once per month with medical direction. As the Staffing Coordinator, and is responsible for staffing all schedule shifts in the field, and dispatch. Primary responsibility is to help reduce cost by controlling overtime in the EMS department. Coordinates the FTO program to assure consistency among the shifts. Implements staff training by the Field Training Officers (FTOs) and assist Shift Chiefs in annual performance evaluations of FTOs in relation to their training activities. Acts as the EMS Infection Control officer and reports any problems to the UMC Infection Control Department.

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EDUCATION AND EXPERIENCE:

High school diploma or its equivalent (GED) is required. Graduation from a paramedic school is required. College level courses in human anatomy and physiology, stats, are desirable. Baccalaureate degree from an accredited four year College or University in Business Administration, Education, or Health Services Administration is also desirable. Previous training experience is preferred, but not required. A minimum of five years of field experience in pre-hospital care is required.

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REQUIRED LICENSURES/CERTIFICATIONS/REGISTRATIONS:

Certification or license by the Texas Department of Health as an Emergency Medical Technician-Paramedic and EMS Instructor are required. American Heart Association Basic Life Support Instructor and Advanced Cardiac Life Support Instructor are required. Pre-hospital Trauma Life Support Instructor, Pediatric Advanced Life Support Provider, Burn Trauma Life Support Provider, and Emergency Vehicle driving Instructor course certifications are also required. Class C driving permit by the Texas Department of Public Safety with no Driving while Intoxicated (DWI) convictions or any other factors, which would preclude insurability, is required.

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PHYSICAL CAPABILITIES:

Routinely, work is of medium physical demand with walking, sitting, and standing required for most tasks.

Occasionally, physical demands will increase when assisting field personnel with the performance of their duties.

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#### SKILLS AND ABILITIES

High degree of knowledge and skill in pre-hospital patient care, EMS training, education, and quality improvement is essential. The ability to accurately generate statistical reports from varied data sources is necessary. Effective working knowledge of applicable Texas Department of Health rules, regulations and guidelines is imperative. Working knowledge of computer hardware and software utilized within the EMS department is helpful.

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#### ENVIRONMENTAL/WORKING CONDITIONS

Ordinarily will work in a well-lighted, heated and ventilated building. Hours may vary to accommodate departmental needs as prescribed by the philosophy of the hospital.

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#### INTERACTION WITH OTHER DEPARTMENTS AND OTHER RELATIONSHIPS:

The ability to effectively interact with departmental and other hospital personnel while maintaining the confidentiality of sensitive information is essential. Must respond in a helpful and considerate manner to the needs of patients, family members, and other health care providers, public safety and law enforcement personnel, EMS students, volunteers, and fellow employees.

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NOTE: This job description/performance appraisal form does not describe all job responsibilities that may be assigned to this job. Job responsibilities may change from time-to-time.

## PERFORMANCE APPRAISAL SECTIONS

### INSTRUCTIONAL GUIDE

*The next sections of the Job Description/Performance Appraisal Form are used to help management staff explain the job responsibilities, performance expectation, set goals, and evaluate job performance. Management Staff should provide employee with regular performance feedback to their employees. Job performance outcome should not be a surprise during the 90-day or annual performance evaluation meeting.*

The Performance Appraisal Section contains:

- 1) Part II – Job Responsibilities - Technical Competence/Leadership Score Card
  - 2) Part III – Policy Compliance and Organizational Behavior – Customary Standards
  - 3) Part IV - Goal Accomplishments and Expected Goals
  - 4) Part V – Mandatory Requirements
- ◆ Mandatory Requirements/Compliance Reminders
  - ◆ Development Need and Improvement Plans
  - ◆ Performance Score Sheet
  - ◆ Signatures

### Performance Ratings:

These performance ratings are used to evaluate an employee's performance.

#### 5-Distinguished/ Exceptional:

Job performance is at the highest possible level when given this rating. Employee achieves performance outcomes that always and significantly exceed the job expectations. Job expectations are constantly performed at an exceptionally high quality level no matter the situation.

#### 4-Commendable/Above Expectation:

Achieves performance expectation outcomes that frequently exceed the requirement or goal. Job expectations are performed with commendable quality.

#### 3-Meets Expectations/Competent:

Employee meets and /or occasionally exceeds all job expectations. Job expectations are performed with quality. This rating recognizes solid quality performance and represents a job well done.

#### 2-Meets Most Expectations/Development Needed/Provisional:

Employee meets most of the job expectations. Job performance is below standard and need improvement. Additional training may be needed. Corrective actions must be documented.

**1-Rarely Meets Expectations/Unsatisfactory:**

Employee rarely meets the job expectations. The employee has either shown value to the organization but lacks the job skills, or desire, or the employee has the skills to perform the task but needs a considerable amount of additional training and close supervision. At this rating, it may be necessary for the employee to seek another position where his/her skills are better suited. Employee must improve performance within a reasonable period in order to retain the position. Corrective action must be documented.

**0-Does Not Meet Expectation/Poor:**

Employee does not meet job expectation. Performance has numerous deficiencies. Performance requires continual and direct supervision. Termination may be required or necessary at this level. Action must be documented to justify continual employment.

**NOTE: Managerial staff is required to provide documentation i.e. in the comment sections for job responsibilities, customary standards or goal accomplishments receiving a 0, 1, 2, 4 or 5 performance rating.**

**Weighting**

Part II, Part III, and Part V are weighted to indicate the relative importance in overall performance appraisal summary. Weighting provides a consistence process for assessing job performance. The weights for each part are:

- ◆ **Part II – Job Responsibilities – Technical Competence/Leadership Score Card- 40%**
- ◆ **Part III – Policy Compliance and Organizational Behavior – Customary Standards - 40%**
- ◆ **Part IV – Goal Accomplishments and Expected Goals - 20%**

*The total rating points for each of the parts are used calculate the overall performance score. The performance score determines the employee's merit increase percentage.*

## Performance Scoring

How to determine the total Performance Score?

|   | A.<br>Total<br>Points | B.<br>Total<br>Possible<br>Points | C.<br>Total<br>Weight<br>Percentage<br>(a ÷ b = c) | D.<br>Assigned<br>Weights<br>Percentage | E.<br>Total<br>Percentage<br>Score<br>(c X d = e) |
|---|-----------------------|-----------------------------------|--|---|---|
| Part II – Job Responsibilities -<br>Technical Competence/<br>Leadership Score Card  |                       |                                   |  | .40                                     |   |
| Part III – Policy Compliance and<br>Organizational Behavior-<br>Customary Standards |                       |                                   |  | .40                                     |   |
| Part IV – Goal Accomplishments  |                       |                                   |  | .20                                     |   |
| Total Percentage Score (Total Col. E)   |                       |                                   |  |   |   |

Step I: Total the number of points achieved for (1) Part I and (2) Part III and (3) Part IV.

Step II: Determine the Total Possible Points for each part.

Step III. Divide the total points by the Total Possible Points for (1) Part I and (2) Part III and (3) Part IV. You will arrive at the Total Weight Percentage.

Step III: Multiple the Total Weight Percentage by the weights assigned to each part.

Step IV: Total the Percentage Scores for each part to achieve the employee's Total Percentage Score.

Step V: Look at the Total Percentage Score Range and the corresponding merit increase percentage. The employee will receive this merit increase percentage for their annual performance.

### NOTE:

- ◆ It is not necessary to complete Step V for the 90-day performance evaluations. A merit increase is not given for this evaluation.
- ◆ Employees must meet 50% or more of the total possible points in Part II, Part III and Part IV to receive a 4%, 5% or 6% merit increase.
- ◆ Vice President or above signature is required for a 4%, 5% or 6% merit increase.

**PART II - JOB RESPONSIBILITIES - WEIGHT ASSIGNED – 40%**

**TECHNICAL COMPETENCE**

Every hospital employee is expected to display an acceptable level of technical competence in carrying out his or her assigned duties. The specific job responsibilities for this position are listed below.

**JOB SPECIFIC RESPONSIBILITIES:**

| <u>Stated Job Responsibilities</u>  | <u>RATING POINTS</u> |
|---|----------------------|
| Insure the quality improvement plan includes the following: <ul style="list-style-type: none"> <li>• Identifies strengths and weakness in program delivery.</li> <li>• Monitors and evaluates the clinical performance of personnel.</li> <li>• Monitors and evaluates patient outcomes.</li> <li>• Collects and accesses information to identify problems and seek resolutions.</li> <li>• Develops a remediation plan for patient care personnel not meeting the standard of care.</li> <li>• Documentation of findings and conclusions of QI process.</li> </ul> |                      |
| Comments:   |                      |
| 2. Insure the patient care report includes: <ul style="list-style-type: none"> <li>• Patient and crew identification data and demographics.</li> <li>• Relevant medical history.</li> <li>• Subjective and objective assessment information.</li> <li>• Mechanism of injury or nature of illness.</li> <li>• Definitive care and observations appropriate to level of care.</li> <li>• Evidence of patient refusal of care or transport.</li> <li>• Patient care forms completed correctly.</li> </ul>  |                      |
| Comments:   |                      |
| 3. Accept and carry out additional routine and special assignments in a timely and accurate manner as required by the needs of the EMS department and UMC. <ul style="list-style-type: none"> <li>• Teach CE as needed by the EMS department.</li> <li>• Meets with Administrative Council weekly to assure consistency among shifts.</li> </ul>  |                      |
| Comments  |                      |
| 4. Insure effective representation of the Lubbock EMS department among regional EMS providers through active participation with South Plains EMS. <ul style="list-style-type: none"> <li>• Performs case reviews at least once per month.</li> </ul>  |                      |

|  |  |
|--|--|
| Comments:  |  |
| <p>5. Coordinates the Field Training Program.</p> <ul style="list-style-type: none"> <li>• Coordinates with the FTO's on the training topics.</li> <li>• Holds regular meetings with the Field Training Staff.</li> <li>• Assist the Shift Chiefs with their FTO's evaluations in relation to training.</li> </ul>   |  |
| Comments:  |  |
| 6. Coordinates staff training by the Field Training Officers ( FTOs ) and assist Shift Chiefs in annual performance evaluations of FTOs in relation to their training activities.  |  |
| Comments:  |  |
| <p>7. Is responsible for the department staffing schedule and coordinates this with the appropriate supervisor.</p> <ul style="list-style-type: none"> <li>• Schedules vacation time replacement personnel with the appropriate personnel.</li> <li>• Insure field personnel do not work over 48 hours straight without taking at least 24 hours off.</li> <li>• Keeps tract of all trade outs and makes sure personnel are following the trade out policy. Reports any misuse to the appropriate supervisor.</li> <li>• Insures personnel are following the vacation time policy and reports and misuse to the appropriate supervisor.</li> <li>• Maintains a master calendar for scheduling that each supervisor can assess.</li> <li>• Helps reduce overtime cost in department by scheduling appropriate personnel.</li> </ul> |  |
| Comments:  |  |
| <p>8. Acts as the EMS Infection Control Officer and reports any problems to the UMC Infection Control Department.</p> <ul style="list-style-type: none"> <li>• Oversees the TB testing of all EMS employees.</li> </ul>  |  |
| Comments:  |  |
| <b>Total Points – Job Responsibilities - Technical Competence</b>  |  |

**PART III - POLICY COMPLIANCE AND ORGANIZATIONAL BEHAVIORS - WEIGHT ASSIGNED – 40%**

Every employee is expected to support the Hospitals Mission, Vision and Value Statements by demonstrating concern for quality, productivity and responsiveness in his/her work as evidenced by:

| <b><u>RATING POINTS</u></b>   |  |
|---|--|
| <p><b><u>Attitude</u></b></p> <p><b><u>Example Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Create a positive first impression.</li> <li>◆ See, Speak &amp; Smile.</li> <li>◆ <u>Always</u> speak positively – <u>no</u> negative comments.</li> <li>◆ Make each customer feel he is the most important person in the facility.</li> <li>◆ Exceed customer expectations.</li> <li>◆ Body language, tone and demeanor should always reflect a positive attitude.<br/><i>Customers are not an interruption; they are our reason for being here.</i></li> </ul> <p><b><u>Customers not only include patients and their family members, but your fellow paramedics and dispatchers.</u></b></p>  |  |
| <p>Comments:</p>  |  |
| <p><b><u>Communication</u></b></p> <p><i>Telephone:</i></p> <ul style="list-style-type: none"> <li>◆ Answer calls with “your department, station and your name”.</li> <li>◆ Do not make or answer cell phone calls anytime during the course of an EMS response.</li> </ul> <p>Radio:</p> <ul style="list-style-type: none"> <li>◆ Listen before you transmit, make certain that the channel/group is clear.</li> <li>◆ Speak distinctly and pronounce words carefully. Speak at a moderate speed using your conversational tone of voice. Remain calm and cordial, words or voice inflections which reflect an individual’s irritation, disgust or sarcasm are not to be used.</li> <li>◆ Avoid transmitting with the windows of the unit open while the sirens are operating, and do not transmit while the air horns are operating.</li> </ul> |  |

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| <ul style="list-style-type: none"> <li>◆ Do not transmit when you are causing feed back from another radio.</li> <li>◆ Use official titles and unit designations. First names or nicknames for call locations are not to be used.</li> <li>◆ It is prohibitive to transmit superfluous signals, messages of a personal nature, to use profanity or obscene language, to make unnecessary or unidentified transmissions.</li> <li>◆ Humor and horseplay should be left to the comedians on commercial radio stations.</li> <li>◆ All EMS personnel should maintain awareness of the need to conserve the use of radio time and make a conscious and positive effort to eliminate unnecessary use of the radio.</li> <li>◆ Stress courtesy by setting the example.</li> </ul> <p><i>Person-to-Person:</i></p> <ul style="list-style-type: none"> <li>◆ See, speak &amp; smile.</li> <li>◆ Introduce yourself by name.</li> <li>◆ Use “please”, “thank you”, “sir”, and “ma’am” when appropriate.</li> <li>◆ Use “Mr.” &amp; “Ms.” with last name when addressing customers – until given permission to use first name.</li> <li>◆ Use “Dr.” and last name for physician in front of patients.</li> <li>◆ Be aware of customer presence during conversation.</li> <li>◆ Be attentive to your tone of voice during conversation.</li> <li>◆ Use easily understood language – avoid acronyms or professional jargon.</li> </ul> |  |
| <p>Comments:</p>   |  |
| <p><b><u>Responsiveness</u></b></p> <p><b><u>Example Behaviors</u></b></p> <ul style="list-style-type: none"> <li>◆ Directions: <ul style="list-style-type: none"> <li>◆ Ask if help is needed.</li> <li>◆ Escort or provide an escort to destination.</li> <li>◆ Provide your business card or name and phone number for further assistance.</li> </ul> </li> <li>◆ Respond to all customer inquiries within 48 hours.</li> <li>◆ Acknowledge voice mails and e-mails within 48 hours.</li> <li>◆ Give customers a realistic time frame for a return call.</li> <li>◆ When sending a fax, it is expected in 10 minutes. Let the recipient know if it will be longer.</li> </ul>   |  |
| <p>Comments:</p>   |  |

**Courtesy**

**Example Behaviors:**

- ◆ Park in designated parking only.
- ◆ Acknowledge family members who are assisting you.
- ◆ Be courteous and professional towards bystanders and other responders.
- ◆ Tell the patient what you are going to do before you do it.
- ◆ Close curtains or doors for privacy-tell the patient why you are doing this.
- ◆ Patients should be appropriately covered or draped for privacy during transport.
- ◆ Always thank the customer for choosing/visiting UMC.
- ◆ Thank the customer for using Lubbock EMS.
- ◆ Communicate & apologize for any delays.

*Rudeness is **never** accepted.*

Comments:

**Confidentiality**

**Example Behaviors:**

- ◆ Don't discuss business, employee or patient information in public settings.
- ◆ Only authorized personnel can release patient information.
- ◆ Conduct conversations with or about customers in private areas.
- ◆ Access to patient information is limited only to employees involved in the patient's care.
- ◆ Keep computer screens and patient charts out of public view.
- ◆ Log off computer and keep passwords private.
- ◆ Keep fax machines and printers out of public reach.
- ◆ Be aware of students during conversations.
- ◆ Do not discuss yours or other employee's evaluations.
- ◆ Do not discuss yours or other employees pay rate.
- ◆ Do not discuss disciplinary action either concerning you or other employees.

Comments:

**Teamwork**

**Example Behaviors:**

- ◆ Be respectful of time away from work area (breaks, lunch, and tardiness, leaving early). When you are away, someone else does your work.
- ◆ Report to duty on time and ready to work.
- ◆ Treat every co-worker as a professional. Recognize that we each have an area of expertise.
- ◆ Don't be afraid to ask for help.
- ◆ Be considerate of everyone's time – avoid last minute requests or changes.
- ◆ Offer help when possible – be supportive.
- ◆ Praise in public, coach in private.
- ◆ Be receptive to constructive criticism.
- ◆ Offer encouragement. Praise when a job is well done.
- ◆ Recognize that teamwork is built on trust. Foster this trust on every occasion.
- ◆ Respect and value different cultures and religious beliefs.

Comments:

**Appearance**

**Example Behaviors**

- ◆ Display your badge properly.
- ◆ Dress cleanly, neatly, decently, and professionally.
- ◆ Follow Dress Code for EMS Personnel, SPP 1.07.
- ◆ Follow organizational and departmental dress code.
- ◆ Keep your work area neat and tidy.
- ◆ Keep food and drink in designated areas. Make sure that food and drink are properly covered during transport.  
*Your dress influences your attitude and the perception of care by others.*

Comments:

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|--|--|
| <p><b><u>Ownership</u></b></p> <p><b><u>Example Behaviors</u></b></p> <ul style="list-style-type: none"> <li>◆ Create an open and friendly environment.</li> <li>◆ Know and understand the responsibilities of your job. Take charge and accept those responsibilities.</li> <li>◆ Be supportive of the team.</li> <li>◆ Say what you mean-mean what you say-prove it by your actions.</li> <li>◆ Do the right job at the right time.</li> <li>◆ Use scripting when appropriate.</li> <li>◆ Keep all areas (hallways, stairwells, etc.) clean and tidy. Pick up litter.</li> <li>◆ Strive for improvement.</li> <li>◆ Take pride in UMC as if you owned it.</li> <li>◆ Represent UMC positively in the community.</li> <li>◆ Represent EMS positively in the community.</li> </ul> |  |
| <p>Comments:</p>   |  |
| <p><b>Total Points – Policy Compliance and Organizational Behaviors</b></p>  |  |
| <p><b><u>Corporate Compliance Program, Patient Safety Plan, Employee Safety Plan</u></b><br/> These Policy Compliances require only a <b><u>YES</u></b> or <b><u>NO</u></b> response;</p> <p><b>Every employee is expected to meet all of these performance compliances. Managers will evaluate employees using a <u>YES</u> or <u>NO</u> response instead of the 1 – 5 performance ratings. <u>YES</u> indicates that the employee has met, if applicable, the described behaviors. These performance compliances will not be used when determining the Total Points for the Policy Compliance and Organizational Behaviors.</b></p>  |  |
| <p><b><u>Corporate Compliance Program</u></b></p> <p><b><u>Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Follows the Compliance Program standards designed to prevent, detect, correct and discipline non-compliant behavior:</li> <li>◆ Participates in initial and continuing educational activities related to the Compliance Plan.</li> <li>◆ Complies with all applicable laws, regulations, policies and procedures.</li> <li>◆ Reports known or suspected violations of the law or the Compliance Plan and</li> </ul>   |  |

|  |  |
|--|--|
| <p>makes that report in good faith with no malicious intent</p> <ul style="list-style-type: none"> <li>◆ Completes the Compliance annual in-service and Acknowledge form.</li> </ul>   |  |
| <p>Comments:</p>   |  |
| <p><b><u>Patient Safety Plan</u></b><br/> Participates in the hospital-wide integrated, <b><u>Patient Safety Plan</u></b>, in all aspects of patient care delivery and support, in order to proactively identify, reduce and manage risk.</p> <p><b><u>Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Participates in ongoing education activities related to Patient Safety.</li> <li>◆ Participates in the design, development and implementation of risk reduction strategies.</li> <li>◆ Reports unusual occurrences utilizing the appropriate documents, and refers them to Risk Management, Pharmacy, etc.</li> <li>◆ Completes the Patient Safety annual In-service.</li> </ul>  |  |
| <p>Comments:</p>   |  |
| <p><b><u>Employee Safety Plan</u></b><br/> Provides or facilitates in providing a clean, safe, quiet and secure workplace environment for all.</p> <p><b><u>Behaviors:</u></b></p> <ul style="list-style-type: none"> <li>◆ Reports any unusual/deficient workplace environment issues to your immediate supervisor or other location as defined in Hospital and Departmental Policy and Procedures. (i.e. job-related hazards).</li> <li>◆ Reports workplace injuries to immediate supervisor or the Employee Health Department.</li> <li>◆ Corrects and/or reports unsafe, unsecured or unclean environment to immediate supervisor and/or Environmental Services and/or Facility Services.</li> <li>◆ Disposes of hazardous chemicals or wastes according to hospital and departmental policies. (i.e., proper use of red bags and sharps disposal containers.)</li> <li>◆ Keeps work area neat and organized to maintain a safe workplace environment.</li> <li>◆ Completes the Environment of Care annual in-services.</li> </ul> |  |
| <p>Comments:</p>   |  |

**PART IV - GOAL ACCOMPLISHMENTS AND EXPECTED GOAL ACCOMPLISHMENTS WEIGHT ASSIGNED- 20%**

This part reviews the established goals for the performance appraisal period.

| Defined Goal (s) | Results and Comments | Rating Points |
|------------------|----------------------|---------------|
|                  |                      |               |
|                  |                      |               |
|                  |                      |               |
|                  |                      |               |

|  |  |
|--|--|
| <b>Total Points – Goal Accomplishments</b> |  |
|--|--|

**EXPECTED GOAL ACCOMPLISHMENTS FOR PERFORMANCE YEAR: \_\_\_\_\_**

| Defined Goal (s) Expected Goal (s) | Expected Outcome or Results |
|------------------------------------|-----------------------------|
|                                    |                             |
|                                    |                             |
|                                    |                             |
|                                    |                             |

**PART V – MANDATORY REQUIREMENTS**

This part reviews the mandatory requirements/compliance reminders and development and improvement plans:

**MANDATORY REQUIREMENTS/COMPLIANCE REMINDERS:**

Check appropriate box (es)

|   |  |
|---|--|
| In-Services   |  |
| Educational Requirements (i.e., leadership)   |  |
| TB Test and/or other Employee Health Test   |  |
| License, Registration, Certification  |  |
| Age-specific core competency compliance   |  |
| Core competencies: <ul style="list-style-type: none"><li>▪ Employee will successfully demonstrate a cricothyrotomy (needle and surgical) twice yearly.</li><li>▪ Employee will successfully demonstrate pleural decompressions twice yearly.</li><li>▪ Employee will successfully demonstrate Intra Osseous Vascular Access twice yearly.</li><li>▪ Employee will be familiar with the Environment of Care and successfully pass an exam covering each topic.</li></ul> |  |

**NOTE: An Educational Resource development training course sheet displaying the above training/education should be attached to the performance appraisal.**

**DEVELOPMENT NEED AND IMPROVEMENT PLANS:**

(Listed below is the specific agreed upon activities to improve areas of performance. Record developmental activities and action plans to further enhance the employee’s capabilities and competencies, which include: in-service, outside training and education, self-developments, etc.)

**PERFORMANCE SCORE SHEET:**

|   | A.           | B.                    | C.                                     | D.                          | E.                                    |
|---|--------------|-----------------------|--|-----------------------------|---------------------------------------|
|   | Total Points | Total Possible Points | Total Weight Percentage<br>(a ÷ b = c) | Assigned Weights Percentage | Total Percentage Score<br>(c X d = e) |
| Part II – Job Responsibilities - Technical Competence/ Leadership Score Card  |              |                       |  | .40                         |                                       |
| Part III – Policy Compliance and Organizational Behavior- Customary Standards |              |                       |  | .40                         |                                       |
| Part IV – Goal Accomplishments  |              |                       |  | .20                         |                                       |
| Total Percentage Score (Total Col. E)   |              |                       |  |                             |                                       |

*Determine which merit increase range the total score from above falls into to determine employees merit increase.*

**TOTAL**

**PERCENT SCORE RANGE**

**MERIT INCREASE**

|         |      |
|---------|------|
| 95-100% | 6.0% |
| 85-94%  | 5.0% |
| 70-84%  | 4.0% |
| 55-69%  | 3.0% |
| 40-54%  | 2.0% |
| 25-39%  | 1.0% |
| 0-24%   | 0.0% |

**MERIT INCREASE FOR THIS EVALUATION = \_\_\_\_\_**

**NOTE:**

- ◆ **It is not necessary to complete Step V for the 90-day performance evaluations. A merit increase is not given for this evaluation.**
- ◆ **Employees must meet 50% or more of the total possible points in Part II, Part III and Part IV to receive a 4%, 5% or 6% merit increase.**
- ◆ **Vice President or above signature is required for a 4%, 5% or 6% merit increase.**

**ADDITIONAL COMMENTS:**

**SIGNATURES:**

Employee's Signature \_\_\_\_\_ Date \_\_\_\_\_

Appraiser's Signature \_\_\_\_\_ Date \_\_\_\_\_

Manager/Director's Signature \_\_\_\_\_ Date: \_\_\_\_\_

\*Signature signifies receipt of appraisal only, and does not indicate agreement.

# PERFORMANCE EVALUATION DOCUMENTATION

## CHECKLIST

The Performance Evaluation Documentation Checklist ensures that all appropriate documentation is complete and attached to the performance appraisal form.

**Employee Name:** \_\_\_\_\_ **Department:** \_\_\_\_\_

Check off all of the appropriate performance appraisal documentation that is included with your checklist:

- Job Description/Performance Appraisal Form**
  - 90-Day Evaluation- included initial competency form
  - Annual Evaluation
- Education Resources (Staff Development) Training Sheets(s)**  
Send all certificates, registrations, and memberships to this department.
- Annual Competency Worksheet (if applicable )**
- Personnel Action Form ( Merit Increase or Salary Adjustments )**  
2% increases- Department Director Only  
4% increases/salary adjustments-Administrative Signature Required
- Job Description/Performance Appraisal ( Title changes/ New Positions Only)**  
A new Job Description/ Performance Appraisal Form are required for all position changes.

\_\_\_\_\_  
Department Head's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Administrator's Signature

\_\_\_\_\_  
Date

**Note:** The Human Resources Department will return all paperwork if this sheet is not attached to the performance appraisal paperwork.