



**Jordan School District**



**Performance**



**Appraisal**



**System**



# *Specialized Subgroups Handbook*

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Revised 2011

**The Jordan  
Registered Nurse  
Performance Appraisal  
System**

# Jordan School District Registered Nurses Performance Appraisal System

## Introduction

The Jordan School District Registered Nurse Performance Appraisal System is designed to give nurses information on their performance from those they provide service to and from their immediate supervisor. Information about the nurse's performance is gathered through a survey which the immediate supervisor uses to complete the evaluation. An optional section is included for noting performance on projects or goals the nurse is working on during the evaluation year.

## The Process

### Orientation/Notification

A registered nurse who is to be evaluated must receive notification of the evaluation at least fifteen working days before the evaluation is to begin. A copy of the instrument and instructions must also be given to her or him.

### Pre-evaluation Meeting

The immediate supervisor schedules a meeting with the registered nurse during the first quarter of the contract year. During this meeting, the immediate supervisor and the nurse identify a client group (those individuals to which the nurse provides support such as teachers, administrators, etc.) A random sample of this group will be asked to provide feedback on the nurse's performance. The names of these individuals are attached to the Pre-evaluation Form.

This meeting also provides an opportunity for the immediate supervisor and the nurse to discuss what projects and goals the nurse will be working on during the current school year. The immediate supervisor and the nurse may elect to make these plans part of the evaluation (optional). If these annual work plans are to be used as part of the evaluation, a standard for acceptable performance for each goal/project should be identified. (If an annual work plan is to be used as part of an evaluation, it should be part of the evaluation for all nurses within the same program/department.) See the appendix for directions for preparing an Annual Work Plan and the Work Plan form.

The immediate supervisor and the nurse will also determine at this meeting when the surveys will be sent to the random sample of the client group and when the final evaluation meeting will be held (the evaluation must be completed and the final evaluation report submitted to the Human Resources Department by April 1).

## Provisional Registered Nurses

The first evaluation of each provisional year will not include the distribution of surveys. This evaluation will consist of the immediate supervisor completing the Jordan School District Registered Nurse Performance Appraisal System Supervisor Form. The optional Specific Performance Areas will not be addressed. The completed evaluation is sent to the District Office, Human Resources Department, by the deadline for first evaluations for provisional educators.

The second evaluation of each provisional year will include the distribution of surveys and, if applicable, the Specific Performance Areas section of the supervisor form.

### Surveys

A Jordan School District Registered Nurse Performance Appraisal System Client Survey Form is sent to twenty randomly selected individuals from the client group list identified during the pre-evaluation meeting. This survey asks the respondent to describe the nurse's performance on thirty-six items divided into seven groups or domains. A three point scale is used: "This statement is Highly Descriptive of this person"; "This statement is Descriptive of this person"; "This statement is Not Very Descriptive of this person." **The respondent is also instructed to leave any item he or she is unsure of blank.** Respondents are instructed to return the survey form in a sealed envelope to the Human Resources Department.

The returned forms are optically scanned and a computer generated report indicating the average rating for each item and each domain is produced. This report is sent to the immediate supervisor to use in evaluating the performance of the nurse

### Evaluation Meeting

The immediate supervisor and the Registered Nurse meet at a predetermined time to discuss the results of the client group survey and to complete the evaluation. The Jordan School District Registered Nurse Performance Appraisal System Supervisor Form is completed during this meeting. The immediate supervisor uses the information from the client group report and other information to rate the performance level of the nurse in eight areas or domains. If the Registered Nurse receives a rating of Fair/Below Standard or Unacceptable, an explanation supported by evidence, must be provided. Written documentation is required and must include any or all of the following:

- observations
- face to face meetings
- phone/email contacts
- written and oral communication
- other pertinent information

If the immediate supervisor and the nurse also agreed that performance goals or projects from an annual work plan would be included in the evaluation, these are rated. The immediate supervisor rates the performance level of the nurse on each of the seven areas as either: unacceptable, fair/below standard, satisfactory/standard, very good/above standard, or outstanding. An overall evaluation rating is then made based on these data.

When the supervisor form has been completed, including any goals or comments, the immediate supervisor and the nurse sign the form. Two copies of the form are made, one is given to the nurse, one is kept by the immediate supervisor and the original is sent to the Human Resources Office to be placed in the nurse's personnel file.

If the Overall Rating for the evaluation is Satisfactory/Standard or above, the evaluation process is complete. If the Overall Rating for the evaluation is Fair/Below Standard or Unacceptable, then a remediation process begins.

### **Remediation Process**

During the Evaluation Meeting, a Registered Nurse Performance Appraisal System Addendum is completed. The immediate supervisor and the nurse identify goals for improvement and the activities and/or resources the nurse will use to reach the goals. The nurse is given at least 20 working days to reach the goals. (The immediate supervisor and the nurse may choose whether or not to send out the survey again.) The immediate supervisor then schedules an evaluation meeting to review the nurse's progress. A Jordan School District Registered Nurse Performance System Supervisor Form is completed at this meeting. If the Overall Rating is Satisfactory/Standard or above, the evaluation process is completed. If the Overall Rating is Fair/Below Standard or Unacceptable, the nurse is placed on probation and a third evaluation cycle begins.

For the third evaluation cycle, a second addendum is completed, identifying goals for improvement and the activities and/or resources the nurse will use to reach the goals. The nurse is given at least 20 working days to reach the goals. (The immediate supervisor and the nurse may choose whether or not to send out the survey again). The immediate supervisor then schedules an evaluation meeting to review the nurse's progress. A Jordan School District Registered Nurse Performance System Supervisor Form is completed at this meeting. If the Overall Rating is Satisfactory/Standard or above, the evaluation process is completed. If the Overall Rating is Fair/Below Standard or Unacceptable, the Registered Nurse may be subject to a change in assignment or to DP 316 Orderly Termination Procedures.

# Jordan School District Registered Nurse Performance Appraisal System Pre-evaluation Form

**Registered Nurse to be evaluated:** \_\_\_\_\_

**Registered Nurse's assignment:** \_\_\_\_\_

**Registered Nurse's location:** \_\_\_\_\_  
(i.e. school name, District Department)

**Immediate Supervisor:** \_\_\_\_\_

**Date of Pre-evaluation Meeting:** \_\_\_\_\_

We have discussed the evaluation process for registered nurses and have identified individuals who are the client group for the nurse being evaluated. A list of these individuals, including their names and the school or District Office Department they are assigned to or address (for parents/out-of-District individuals) is attached on a separate sheet. If a large group, such as principals, is to be used, the Registered Nurse and Immediate Supervisor may say select from all principals rather than including the name of each principal. The list must include at least 20 names.

**It is recommended these surveys be sent out by the end of February.**

Date preferred for surveys to be sent \_\_\_\_\_

**The Evaluation Meeting should be held within 15 working days of receiving the survey feedback report.**

**Registered Nurse's Signature:** \_\_\_\_\_

**Immediate Supervisor's Signature:** \_\_\_\_\_

Make two copies of this form after it is completed. One copy should be given to the nurse, one copy should be retained by the immediate supervisor and the original (including the client group list) should be sent to the JPAS office as soon as you have held the pre-evaluation meeting.

\* Attach the client group list.

# Jordan School District Registered Nurse Performance Appraisal System

## Client Survey Form

Using the accompanying optical-scan answer sheet, describe the work of the person identified on the attached label. Please respond to each of the following items using the 3-point scale in the box below. If you are not sure about a particular item, or the item does not apply, leave it blank on the answer sheet. Your rating will be kept confidential and will be combined with those of other individuals rating this person.

A    B    C    D    E  
○    ○    ○    ○    ○

A	This statement is <u>Highly Descriptive</u> of this person
B	This statement is <u>Descriptive</u> of this person
C	This statement is <u>Not Very Descriptive</u> of this person
If you are unsure about any item, leave it blank.	

### A. LEADERSHIP

1. Supports the goals and objectives of the district.
2. Works collaboratively with school staff, families, community agencies, physicians, and team members.
3. Facilitates positive organizational change in delivering health services.
4. Supports local school goals and priorities while providing program support.

### B. JUDGMENT AND CONFIDENTIALITY

5. Maintains appropriate confidentiality.
6. Adheres to policies and procedures of Jordan School District.
7. Includes appropriate team members in problem solving for health care needs.
8. Demonstrates critical, logical, and creative problem solving.
9. Make decisions in a timely fashion.
10. Considers the rights and concerns of others when making judgments.
11. Makes sound judgments based on nursing skills and knowledge.

### C. INTERPERSONAL SKILLS

12. Treats students, staff, and the public with respect and understanding.
13. Promotes a positive organizational climate.
14. Encourages teamwork and collegiality.
15. Relates well with other staff members.
16. Accepts and responds positively to constructive criticism and suggestions.

### D. COMMUNICATION SKILLS

17. Communicates appropriately with parents/guardians.
18. Communicates effectively with school administration and staff.
19. Communicates effectively with students.
20. Communicates effectively with staff regarding the health needs of students and current medical issues.
21. Expresses ideas clearly in both oral and written form.
22. Follows-up with messages and requests in a timely manner.

### E. DEVELOPMENT, TRAINING, AND MANAGEMENT SKILLS

23. Provides appropriate in-service training at the school and/or district level.
24. Instructs and supports the staff in use of prescribed effective procedures to meet individual health care needs of students.
25. Organizes and conducts required vision screenings and reporting.
26. Facilitates scoliosis screenings and reporting.

### F. PROFESSIONAL STANDARDS AND COMPLIANCE

27. Demonstrates knowledge of and complies with Salt Lake Valley and Utah State Health Departments and Center for Disease Control standards and practices.
28. Demonstrates knowledge and complies with the Utah Nurse Practice Act.
29. Demonstrates personal integrity and professional ethics.
30. Monitors and assists with state immunization laws and reports.
31. Attends required meetings.
32. Work is accurate and precise.

### G. PLANNING AND ORGANIZATION

33. Maintains health files and records in an organized fashion.
34. Manages time and schedules effectively.
35. Places healthcare plans and required data collection on Skyward.
36. Visits schools/classrooms often throughout the school year to determine ongoing needs.



## H. PROFESSIONAL GROWTH AND RESPONSIBILITIES

*\*Indicators 37 - 45 are to be completed by the immediate supervisor only.*

37. Maintains and provides evidence of current nursing license.

Yes

No

38. Submits school, district, and state reports on time.

Yes

No

39. Maintains current CPR certification and/or instructor's certification.

Yes

No

40. Attends and follows through on committee assignments.

Yes

No

41. Attends team meetings regularly.

Yes

No

42. Participates in professional development activities.

Yes

No

43. Shows daily contact log.

Yes

No

44. Shows three completed Health Care Plan records, including health folders.

Yes

No

45. Shows documentation of training on healthcare procedures.

Yes

No

# Jordan School District Registered Nurse Performance Appraisal System

## Supervisor Form

Registered Nurse Name:	Soc. Sec. #	Dept/School:
Immediate Supervisor:		Evaluation Date:

<b>General Performance Areas</b>  <i>*A Fair/Below Standard or Unacceptable rating must be accompanied by written documentation.</i>	Performance Level					Specific Performance Objectives (optional)	Performance Level				
	Unacceptable	Fair/Below Standard	Satisfactory/Standard	Very Good/Above Standard	Outstanding		Unacceptable	Fair/Below Standard	Satisfactory/Standard	Very Good/Above Standard	Outstanding
<b>A. Leadership</b> Overall performance in structuring work and collaborating with others in order to accomplish program and district goals and objectives.						These objectives should be taken from each employee's annual work plan					
<b>B. Judgement and Confidentiality</b> Ability to recognize problem situations, use appropriate information and make decisions in a timely fashion.						<b>Objective #1</b> From annual work plan*					
<b>C. Interpersonal Skills</b> Ability to work effectively with all stakeholders, respond positively to requests and suggestions, and promote a positive climate.						<b>Objective #2</b> From annual work plan*					
<b>D. Communication Skills</b> Communicates effectively with all stakeholders, both verbally and in writing, in a timely manner.						<b>Objective #3</b> From annual work plan*					
<b>E. Development, Training and Management Skills</b> Ability to deliver effective training based on individual student/school needs. Manage all aspects of required screenings.						<b>Objective #4</b> From annual work plan*					
<b>F. Professional Standards and Compliance</b> Knowledge and compliance to relevant standards, reporting expectations, and high quality work.						<b>Objective #5</b> From annual work plan*					
<b>G. Planning and Organization</b> Demonstrates organizational competence and maintains appropriate records.						<b>Objective #6</b> From annual work plan*					
<b>H. Professional Growth and Responsibilities</b> <i>*Indicators 37 - 45 completed by the immediate supervisor.</i>											

\*Provide a short description of item

Use space below for comments. Use additional sheets if necessary.

Examples of work well done. (Products and/or Activities)

Goals for performance improvement:

Overall Evaluation:

- Outstanding
- Very Good/Above Standard
- Satisfactory/Standard

\*Five or more of the eight domains must have a rating of Fair/Below or Unacceptable when marking the following as an overall rating.

- Fair/Below Standard
- Unacceptable

Employee's Comments: (optional)

Signature of Immediate Supervisor:

Date:

Signature of Registered Nurse:

Date:

I understand that I may make a written response to all or any part of this evaluation, and that the response will be attached to this form. If I am not satisfied with the evaluation, I have thirty days to request a review. My signature does not necessarily indicate that I agree with this evaluation, but that I have read the above information and have received a copy of this form.

# Jordan School District Registered Nurse Performance Appraisal System Addendum

Name: \_\_\_\_\_ Date: \_\_\_\_\_

This addendum supplements the Registered Nurse Performance Appraisal System Supervisor Form for an evaluation which resulted in an overall rating of "Fair/Below Standard" or "Unacceptable".

*The completion of this addendum is necessary because your performance has been found to be unacceptable or below the basic level of acceptable performance established by District policy. Your continued employment with the District is in question. You are responsible to bring your performance to an acceptable level. The following is a plan for improvement.*

### Goals/Objectives

### Activities to Accomplish Objectives

The following resources will be used in helping reach the goals/objectives listed above:

Consulting Nurse  Yes  No (didn't want Consulting Nurse)

Professional books, articles, videos  Yes  No

Other \_\_\_\_\_  Yes  No

(specify)

Your next evaluation may begin on or after: \_\_\_\_\_

*(specify month and year 20 working days after Evaluation Meeting)*

Placed on Probation:  Yes  No

Registered Nurse's Signature: \_\_\_\_\_

Immediate Supervisor's Signature: \_\_\_\_\_

\*Make two copies of the completed addendum. One is given to the evaluatee, one remains with the immediate supervisor. The original is attached to the Supervisor Form and sent to the Human Resources Department.

# **Annual Work Plan Preparation**

# Jordan School District Preparation of an Annual Work Plan

## Rationale

The purpose of the Jordan School District Annual Work Plan is to give employees in schools or departments electing to use the plan a means to establish specific objectives for themselves. This is to be accomplished in collaboration with the employee's supervisor and must be approved by the supervisor.

The Annual Work Plan is used at the discretion of schools or departments and is an optional component of the "Performance Appraisal System" used for several categories of jobs in the district. The Annual Work Plan allows employees to define their jobs beyond the "general performance areas" of the Performance Appraisal System by writing **specific** work objectives and definitions of satisfactory or "standard" performance. The specific objectives and definitions then become a part of the employee's appraisal. Both the general performance areas and the specific performance objectives are evaluated by the employee's supervisor at the end of the performance period.

## Suggested Process for Preparing the Annual Work Plan

1. The department establishes **departmental** goals or objectives in a collaborative process.
2. Individual employees incorporate appropriate **departmental** objectives into their **personal** work plan.
3. Specific **personal work objectives** not in the departmental objectives maybe identified by employees and/or supervisors and incorporated into the personal work plan.
4. Each employee meets with the supervisor to discuss the employee's objectives, and the supervisor approves the employee plan.
5. The supervisor evaluates performance on attainment of the objectives at the end of the performance period.

## Using the Annual Work Plan Form

The Annual Work Plan form is completed by entering two items for each specified objective. First, the objective itself is written. Second, the satisfactory or “standard” level of performance is identified. An objective describes a major element in the employee’s job in terms of a general outcome, e.g. “Provide appropriate inservice training to secondary English teachers.” The satisfactory or “standard” level of performance would be a more specific statement, such as: “All English faculty in the district’s secondary schools will receive ten hours of training during the next school year. Training will be evaluated by a participant feedback form.”

Other examples of specific objectives and definitions of satisfactory performance standards are attached to this document.

# Examples of Work Plan Objectives and “Standard” Performance Levels

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## Example 1

### Objective #1

#### Specify Objective:

*Perform special, major research/assessment/evaluation studies to provide information to USOE, the State Board, the Legislature, etc.*

- Outstanding- Unique and exceptional performance and/or accomplishments.
- Above Standard- Clearly and consistently above what is required.
- Standard-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).

*1. Three major special studies are planned, executed, and completed.*

*2. Pertinent reports are provided from each study.*

*3. Presentations of key findings made to the State Board of Education, Legislature, and USOE staff.*

- Below Standard- Marginal Performance. Fails to meet some significant job requirements
- Unacceptable- Clearly inadequate performance.

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## Example 2

### Objective #2

#### Specify Objective:

*Provide training to new teachers in JSD in effective teaching skills and the JPAS.*

- Outstanding- Unique and exceptional performance and/or accomplishments.
- Above Standard- Clearly and consistently above what is required.
- Standard-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).

*1. Hold classes in October for all new teachers*

*2. Participants will evaluate content of class and how class is taught*

*3. Course design will be modified according to results of evaluation. Modified class will be held in January.*

- Below Standard- Marginal Performance. Fails to meet some significant job requirements.
- Unacceptable- Clearly inadequate performance.



# Jordan School District Employee Annual Work Plan

Employee: \_\_\_\_\_ SocSec#: \_\_\_\_\_

Department/School: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Plan Period: \_\_\_\_\_

See the District document "Preparation of an Annual Work Plan" for instructions on completing this form.

## Objective #1

Specify Objective:

### Performance Levels

- OUTSTANDING- Unique and exceptional performance and/or accomplishments.
- ABOVE STANDARD- Clearly and consistently above what is required.
- STANDARD-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).
- BELOW STANDARD- Marginal Performance. Fails to meet some significant job requirements.
- UNACCEPTABLE- Clearly inadequate performance.

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## Objective #2

Specify Objective:

### Performance Levels

- OUTSTANDING- Unique and exceptional performance and/or accomplishments.
- ABOVE STANDARD- Clearly and consistently above what is required.
- STANDARD-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).
- BELOW STANDARD- Marginal Performance. Fails to meet some significant job requirements.
- UNACCEPTABLE- Clearly inadequate performance.

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## Objective #3

Specify Objective:

### Performance Levels

- OUTSTANDING- Unique and exceptional performance and/or accomplishments.
- ABOVE STANDARD- Clearly and consistently above what is required.
- STANDARD-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).
- BELOW STANDARD- Marginal Performance. Fails to meet some significant job requirements.
- UNACCEPTABLE- Clearly inadequate performance.

## Objective #4

Specify Objective:

### Performance Levels

- OUTSTANDING- Unique and exceptional performance and/or accomplishments.
  - ABOVE STANDARD- Clearly and consistently above what is required.
  - STANDARD-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).
  - BELOW STANDARD- Marginal Performance. Fails to meet some significant job requirements.
  - UNACCEPTABLE- Clearly inadequate performance.
- 

## Objective #5

Specify Objective:

### Performance Levels

- OUTSTANDING- Unique and exceptional performance and/or accomplishments.
- ABOVE STANDARD- Clearly and consistently above what is required.
- STANDARD-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).
- BELOW STANDARD- Marginal Performance. Fails to meet some significant job requirements.
- UNACCEPTABLE- Clearly inadequate performance.

## Objective #6

Specify Objective:

### Performance Levels

- OUTSTANDING- Unique and exceptional performance and/or accomplishments.
  - ABOVE STANDARD- Clearly and consistently above what is required.
  - STANDARD-Meets the requirements of the job in all respects (**Specify Standard Expectations for this Objective**).
  - BELOW STANDARD- Marginal Performance. Fails to meet some significant job requirements.
  - UNACCEPTABLE- Clearly inadequate performance.
- 

### Signatures for Annual Work Plan:

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_