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FOIA MARKER

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Record Group/Collection: Donated Historical Materials
Collection/Office of Origin: Frieden, Lex, Collection
Series: Disability Rights Organizations
Subseries:

OA/ID Number: 52058
Folder ID Number: 52058-006

Folder Title:
ILRU [Independent Living Research Utilization] Standards [1996]

Stack:

Row:

Section:

Shelf:

Position:

Lex-

This is a handout
from mgt. council.

Thought you'd like
a copy since you
will be doing perf.
reviews. 191

Document Originally
Attached to
Following Page

GENERAL INFORMATION

Performance Definitions

1. **"B" - Below Competency Standards** - Employee does not meet job requirements, departmental expectations, and/or competency standards.
2. **"MS" - Meets Competency Standards Sometimes** - Employee does not consistently meet job requirements, departmental expectations, and/or competency standards.
3. **"CM" - Consistently Meets Competency Standards** - Employee consistently meets assigned job requirements and/or competency standards and contributes to the success of the department. Minimal supervision with minimal errors.

Examples -

- a) Accepts directions well.
- b) Works well with others.
- c) Completely carries out assigned job requirements and follows through whenever necessary.
- d) Assists customers in a courteous and helpful manner.
- e) Is in attendance at work 95% of the time; is punctual.

4. **"ES" - Exceeds Competency Standards Sometimes** - Employee achieves results that exceed requirements and/or competency standards in most areas and performs tasks with little or no supervision.

Examples - Demonstrates all of the above performance, plus:

- a) Always gives stable and predictable work performance.
- b) Finds productive work to keep busy during slack periods.
- c) Assists other employees without being asked.
- d) Takes initiative to maintain employee team harmony.
- e) Is in attendance at work 97% of the time or more; is punctual.

5. **"CE" - Consistently Exceeds Competency Standards** - Employee consistently exceeds job requirements and/or competency standards and achieves excellent results with little or no direction or supervision.

Examples - Demonstrates all of #3 and #4 performance above, plus:

- a) Regularly receives favorable comments from co-workers and customers.
- b) Demonstrates superior knowledge of his/her entity and services.
- c) Uses excellent skill and judgment in resolving customer problems.
- d) Consistently performs in an outstanding manner that serves as a role model.

6. **"NA" - Not Applicable** - Due to special circumstances, the performance standard or responsibility does not apply to the employee's job during the performance interview period.

Helpful Things to Remember

1. During the performance interview, both manager and employee are to rate each responsibility (or standard, if applicable) in the job description using the appropriate performance definitions.
2. Provide a comment on all BELOW, MEETS SOMETIMES, EXCEEDS SOMETIMES, and CONSISTENTLY EXCEEDS ratings.
3. All BELOW and MEETS SOMETIMES ratings must have an accompanying goal written.
4. The manager has the responsibility of circling the final negotiated rating in order to complete the form.
5. Don't forget to state the "overall rating" on the appropriate page. A manager's comment must be given in this section when the following occurs:
 - a) Negotiated ratings within the performance interview differ from the final "overall rating";
 - or,
 - b) A BELOW, MEETS SOMETIMES, EXCEEDS SOMETIMES, or CONSISTENTLY EXCEEDS rating has been given for an "overall rating".

An employee who receives an "overall rating" of BELOW or MEETS SOMETIMES will not be eligible to receive any possible merit increase.

6. The "overall rating" for employees who have been in the "Corrective Discipline Process" (written/suspension/probation) will drop one (1) complete step (i.e., consistently meets rating will drop to meets sometimes) if:
 - a) Disciplinary action (which includes suspension and/or probation) occurs at any time during the appraisal period;
 - or,
 - b) Two (2) written counselings are received at any time during the appraisal period. The written counselings do not have to be for the same reason.
7. Goals with time indicators noted are required for JCAHO.
8. A new employee will need to be reviewed at the end of the 6-month introductory period, as well as by August 31 of each service year. There will be no need to do feedback sheets for the 6-month review.
9. A minimum of 3 feedback sheets for annual performance interviews are required. Employee should select 1 individual, with the supervisor choosing the remaining 2. Feedback information should be handled "confidentially" at all times.

JOB DESCRIPTION FORMAT

Attached is the new standard job description format that is to be utilized throughout TIRR Systems' entities.

PART I

The first (and in some cases the main) part of the job description consists of the following:

Page 1 -

1. Job Title
2. Date Written
3. Job Purpose
4. Supervision
5. Qualifications
6. Essential Skills Required
7. Interrelationship Requirements

Page 2 -

8. Essential Physical Requirements
9. Essential Responsibilities
10. Organizational Teamwork and Support Responsibilities (OTSR)

A Specially Printed Form for All of the Below Information is Available
(including OTSRs) -

11. Performance Improvement Goals
12. Performance Interview Feedback from Co-Workers and/or Employees
13. Overall Rating for Performance Interview
14. Employee's Additional Comments
15. Signature Page for Both Job Description and Performance Interview
16. Rating Definitions

PART II

The second part of the job description will consist of only Essential Responsibilities (and Performance Standards **when they are required for JCAHO and/or CARF criteria-based purposes**). Part II will need to be formatted in a simple word processing method and maintained in each appropriate department along with Part I. The entire job description (Parts I and II) will be given to each new employee for reviewing and signing during the initial departmental orientation and later utilized as the annual appraisal form for the employee's performance interview with the department manager.

The entire job description should be reviewed annually and revised as necessary for all employees. A **current copy of only Part I should be kept on file with the Personnel Administrator** at the main TIRR System's office. A copy of the entire job description (Parts I and II) should be kept by the manager of the appropriate department and forwarded to a personnel liaison for filing once the employee's Performance Interview is completed each year. A new job description should then be signed for the upcoming year and maintained by the manager until the next performance interview is complete.

TIRR SYSTEMS' ENTITY NAME
Department Name
Job Description and Performance Interview

JOB TITLE: Official Personnel Title DATE WRITTEN: (or updated)

JOB PURPOSE:

Why does the job exist? What is the basic purpose of the position?

SUPERVISION:

Received from: Who supervises this employee?
Give to: Who does this employee supervise?

QUALIFICATIONS: (Education/Experience/Licensure)

What are the minimum requirements for education and experience?
Is overtime required to be worked on weekdays, weekends, and/or holidays?

For JCAHO and/or CARF purposes: Clinical positions require a qualification statement that refers to age related experience.

Example - Ability to demonstrate competency and a basic knowledge of age specific criteria in the patient population served.

ESSENTIAL SKILLS REQUIRED:

What are the skills required for satisfactory job performance? (i.e. knowledge of a specific type of word processing software, necessary typing speed with accuracy, effective oral and written communication skills, ability to prioritize and complete multiple tasks within deadlines, etc.)

INTERRELATIONSHIP REQUIREMENTS:

What significant relationships exist between this position and other departments and institutions? Is confidentiality to be maintained for employee and/or patient information?

ESSENTIAL PHYSICAL REQUIREMENTS: What are the physical and/or mental demands as well as the working conditions of the job? What, if any, are the lifting demands with usual weight designations?

Example for secretarial position: Ability to work in an office environment.

ESSENTIAL RESPONSIBILITIES: Manager: List, in descending order, six to ten most important responsibilities (not duties -- remember, how to do a job may change, but the responsibility may not) of the position, as they relate to the position's basic purpose. There are five fixed responsibilities that are the same for all managers. One to five other essential responsibilities should be listed. Each responsibility listed should complete the phrase, "To meet the standards and competency of this position, an employee must..."

***For JCAHO and/or CARF purposes:** Clinical positions require an essential responsibility statement that refers to age specific criteria.

Example - Demonstrate knowledge of age specific criteria in the age population served.

Employee: List, in descending order, four to ten most important responsibilities (not duties) of the position, as they relate to the position's basic purpose. These should be broad responsibilities, not specific activities or tasks. Each responsibility listed should complete the phrase, "To meet the standards and competency of this position, an employee must..."

***For JCAHO and/or CARF purposes:** Clinical positions require an essential responsibility statement that refers to age specific criteria.

Example - Demonstrate knowledge of age specific criteria in the age population served.

ORGANIZATIONAL TEAMWORK AND SUPPORT RESPONSIBILITIES (OTSR):

The following four responsibilities are the same for all employees and will be part of a specially printed form. They will complete the following phrase, "The person in this position must..."

1. **Maintain professional conduct and image** (verbal and written communication ability, body language, cooperation, open mindedness, dependability, approachability, consideration of work environment, compliance with dress code).

2. **Maintain attendance standards** (punctuality, attendance, scheduling of absences).

3. **Be flexible** (adjustment to change, resetting of priorities, time management skills, resourcefulness, initiative).

4. **Interact with fellow employees, patients, visitors, and/or external customers** (effectiveness of working with others, courtesy, tact, friendliness, enthusiasm, caring and helpful nature, comforting style).

Job Description

Page 3

*Performance Standards are only necessary for satisfying JCAHO and/or CARF requirements in building criteria-based job description. Below are examples of some performance standards from which to choose in order to complete the essential responsibility relating to "age".

1. Knowledge of growth and development.
2. Ability to assess age specific data.
3. Ability to interpret age specific data.
4. Possession of skill/knowledge to perform treatment, i.e., medication, equipment, etc.
5. Age appropriate communication skills.
6. Possession of knowledge of age specific community resources.
7. Involvement of family and/or significant other in plan of care.

A SPECIALLY PRINTED FORM FOR ALL OF THE BELOW INFORMATION IS AVAILABLE

PERFORMANCE IMPROVEMENT GOALS: List Essential Responsibilities and OTSRs for which goals are being set for the next appraisal period. Goals should be objective and measureable and determined with input and commitment from the employee. The items below should be utilized:

Goals/How Measured (Indicators)/Dates To Be Achieved/Date Achieved

PERFORMANCE INTERVIEW FEEDBACK FROM CO-WORKERS AND/OR EMPLOYEES: (Attachments may be included) - The manager is to solicit written, confidential peer feedback from the employee's peers and/or colleagues regarding the following:

1. Areas of Strength
2. Areas to Strengthen
3. Other Comments

The manager is to send out a minimum of three (3) Performance Interview Feedback forms with the respective employee choosing only one (1) of the three (3) commenting individuals. There is no need for the manager to send out feedback forms for employees receiving evaluations at six (6) months.

OVERALL RATING FOR PERFORMANCE INTERVIEW: At the completion of the Performance Interview, the manager will summarize each employee's performance by placing that employee in an overall category rating of "consistently exceeds, exceeds sometimes, consistently meets, meets sometimes or below standards" for the entire process.

EMPLOYEE'S ADDITIONAL COMMENTS: The manager should allow the employee the opportunity to make any additional comments he/she wishes.

SIGNATURE PAGE FOR JOB DESCRIPTION/PERFORMANCE INTERVIEW: Below is the wording that will be included on the printed form.

Job Description
Page 4

Job Description

I have reviewed this job description and I understand that my performance interview will be based on these responsibilities (and standards, if applicable).

REVIEWED AND ACCEPTED BY:

EMPLOYEE _____ DATE _____

APPROVED BY:

MANAGER _____ DATE _____

Performance Interview

During my performance interview, the responsibilities (and standards, if applicable) listed herein were utilized to evaluate my work. I have reviewed and discussed each area with my manager/supervisor. I have, also, read and understand the goals that have been established in enhancing my developmental needs for continued quality improvement. My signature acknowledges that I have read this document, but does not necessarily indicate that I agree with it.

REVIEWED AND DISCUSSED WITH:

EMPLOYEE _____ DATE _____

APPROVED BY:

SUPERVISOR _____ DATE _____

MANAGER _____ DATE _____

PROG. ADM/V. PRES/ _____ DATE _____

COO/CEO _____ DATE _____

(if applicable)

RATING DEFINITIONS:

B - Below Competency Standards - Employee does not meet competency standards.

MS - Meets Competency Standards Sometimes - Employee does not consistently meet competency standards.

CM - Consistently Meets Competency Standards - Employee consistently meets competency standards and contributes to the success of the department.

ES - Exceeds Competency Standards Sometimes - Employee achieves results that exceeds competency standards in most areas and performs tasks with little or no supervision.

CE - Consistently Exceeds Competency Standards - Employee consistently exceeds competency standards and achieves excellent results with little or no direction or supervision.

THE INSTITUTE FOR REHABILITATION AND RESEARCH
Social Work Department
Job Description and Performance Interview

Chen
5-10-96

JOB TITLE: Social Worker I

DATE REVISED: April, 1996

JOB PURPOSE:

Assists patients and their families in making favorable psychosocial adaptation to disability, facilitates most effective discharge plan, promotes community reintegration and continuity of care. Serves as case manager to ensure coordination of rehabilitation services and effective management of available resources.

SUPERVISION:

Received from: Assigned Social Worker II Supervisor
Given to: Social Work Students (indirect)

QUALIFICATIONS (EDUCATION/EXPERIENCE/LICENSURE):

1. Must possess a Masters Degree in Social Work.
2. License in Social Work for State of Texas or must obtain license within one year of employment date.
3. Must demonstrate competency to work with a wide age range (infancy to aged) and a variety of diagnostic categories.

ESSENTIAL SKILLS REQUIRED:

1. Skill in assessing social, psychological, environmental needs of patients and families and providing appropriate intervention.
2. Ability to manage the rehabilitation process for assigned patients requiring collaboration, coordination, prioritization skills.
3. Excellent interactive, verbal and written skills.
4. Ability to prioritize and complete multiple tasks within deadlines.

INTERRELATIONSHIP REQUIREMENTS:

1. Ability to develop effective working relationships with patients and/or families and other members of the rehabilitation team.
2. Ability to effectively provide and receive information and work collaboratively with insurance and community agency representatives as well as inter-institutional personnel.
3. Ability to positively represent TIRR in the community and to the public in general.
4. Maintain confidentiality in accordance with hospital, departmental and NASW Code of Ethics.

ESSENTIAL PHYSICAL REQUIREMENTS:

1. Ability to verbalize clearly and intelligibly.
2. Visual and hearing acuity sufficient to assess and provide services to patients and families and to communicate with interdisciplinary team and outside support/community services.
3. Sufficient mobility to access hospital environment.
4. Manual dexterity sufficient to manage communication equipment.

ESSENTIAL RESPONSIBILITIES:

1. Provide orientation to the rehabilitation process and complete a psychosocial assessment that includes a plan of service.
2. Provide individual and group counseling based on assessed needs.
3. Provide case management services.
4. Plan, facilitate and coordinate the most effective discharge plan including appropriate community linkage and agency utilization.
5. Meet departmental expectations and standards related to service delivery, documentation, productivity, professional development and departmental and hospital participation.

ORGANIZATIONAL TEAMWORK AND SUPPORT RESPONSIBILITIES (OTSR):

1. Maintain professional image (verbal and written communication ability, body language, cooperation, open mindedness, dependability, approachability, consideration of work environment, compliance with dress code).
2. Maintain attendance standards (punctuality, attendance, scheduling of absences).
3. Be flexible (adjustment to change, resetting of priorities, time management skills, resourcefulness, initiative).
4. Interact with fellow employees, patients, visitors, and/or external customer (effectiveness of working with others, courtesy, tact friendliness, enthusiasm, caring and helpful nature, comforting style).

NAME: _____ EMPLOYEE #: _____ DATE: _____

POSITION: Social Worker I DEPARTMENT: Social Work Department

ESSENTIAL RESPONSIBILITIES AND PERFORMANCE STANDARDS

To meet the standards and competency of this position, an employee must:

EMPLOYEE RATING	MANAGER RATING
--------------------	-------------------

- | | | |
|---|-------|-------|
| 1. Provide orientation to the rehabilitation process and complete a psychosocial assessment that includes a plan of service. | _____ | _____ |
| a) Provide all requested pre-admission orientation contacts with families and 100% post-admission orientation to patients and/or families according to time standards established by the department. | | |
| b) Produce a documented psychosocial assessment adhering to departmental standards defining timeliness and content criteria. | | |
| c) Develop a treatment plan based on the assessment. Department standards require a treatment plan on all assessments. | | |
| d) Provide initial and ongoing information and consultation to other team members regarding social, psychological, age related behavioral expectations, environmental issues related to individual patient and family situations. | | |

COMMENTS: _____

- | | | |
|---|-------|-------|
| 2. Provide individual and group counseling based on assessed needs. | _____ | _____ |
|---|-------|-------|

- | | | |
|---|--|--|
| a) Provide counseling services to patients and families based on psychosocial assessment regarding social, psychological, age - related behavioral expectations and environmental issues. Counseling to be provided according to professional standards in NASW Code of Ethics. | | |
| b) Plan and facilitate educational, therapeutic, support groups as determined by patients' ongoing needs assessment. | | |

COMMENTS: _____

NAME: _____ EMPLOYEE #: _____ DATE: _____

POSITION: Social Worker I DEPARTMENT: Social Work Department

ESSENTIAL RESPONSIBILITIES AND PERFORMANCE STANDARDS

To meet the standards and competency of this position, an employee must:

EMPLOYEE RATING	MANAGER RATING
--------------------	-------------------

3. Provide case management services.

- a) Integrate information from patient/family and team to establish a listing of rehabilitations goals documented in weekly Team Round Notes.
- b) Monitor service provision to ensure appropriate goals are addressed in a timely manner.
- c) Negotiate patient scheduling conflicts drawing on knowledge of goal priorities.
- d) Perform leadership function in patient/team rounds and schedules and participates in conferences with patient/ family team. Monitored by number of valid complaints.
- e) Serve as a liaison between the team and family to communicate patient progress and other information from team rounds. Communicate with insurance representatives as appropriate.

COMMENTS: _____

4. Plan, facilitate and coordinate the most effective discharge plan including appropriate community linkage and agency utilization.

- a) Collaborate with patient/family and team in planning post-hospital care for patients and arranges these services in a timely manner.
- b) Identify and maintain current information on community resources and eligibility requirements.
- c) Mobilize and facilitate patients and families understanding and use of community resources and promoting their ability to be self advocates.

COMMENTS: _____

NAME: _____ EMPLOYEE #: _____ DATE: _____

POSITION: Social Worker I DEPARTMENT: Social Work Department

ESSENTIAL RESPONSIBILITIES AND PERFORMANCE STANDARDS

To meet the standards and competency of this position, an employee must:

EMPLOYEE RATING	MANAGER RATING
--------------------	-------------------

5. Meet departmental expectations and standards related to service delivery, documentation, productivity, professional development and departmental and hospital participation.

- a) Organize and prioritize assigned work to achieve total service need of the patient.
- b) Document weekly team conference notes, social work assessments and progress notes within the defined time standard.
- c) Maintain the productivity standard established by the department. Monitored by monthly feedback reports.
- d) Attend and participate in weekly departmental meetings and inservices. Participate in development of yearly department goals and Continuous Quality Improvement plan.
- e) Participate in new staff (department and hospital) orientation as assigned.
- f) Participate in program and service development, task forces and committees, and educational presentations as requested by others and approved by Director.
- g) Have knowledge and follow department and hospital policies and procedures.
- h) Attend continuing education presentations to meet annual CSW credential requirements and as requested by Director.
- i) Has satisfied goals previously set.

COMMENT: _____

Name: _____ Employee #: _____ Date: _____

Position: _____ Department: _____

ORGANIZATIONAL TEAMWORK AND SUPPORT RESPONSIBILITIES (OTSR)

	EMPLOYEE RATING	MANAGER RATING
1. Maintain professional conduct and image (verbal and written communication ability, body language, cooperation, open mindedness, dependability, approachability, consideration of work environment, compliance with dress code).	_____	_____
2. Maintain attendance standards (punctuality, attendance, scheduling of absences).	_____	_____
3. Be flexible (adjustment to change, resetting of priorities, time management skills, resourcefulness, initiative).	_____	_____
4. Interactive with fellow employee, patients, visitors, and/or external customers (effectiveness of working with others, courtesy, tact, friendliness, enthusiasm, caring and helpful nature, comforting style).	_____	_____

PERFORMANCE IMPROVEMENT GOALS

GOALS	HOW MEASURED	DATE TO BE ACHIEVED	DATE ACHIEVED

PERFORMANCE INTERVIEW FEEDBACK FROM CO-WORKERS AND/OR EMPLOYEES
(Attachments may be included)

Areas of Strength: _____

Areas to Strengthen: _____

Other Comments: _____

OVERALL RATING FOR INTERVIEW: _____

Supporting Comments: _____

EMPLOYEE'S ADDITIONAL COMMENTS: _____

I have reviewed this job description and I understand that my performance interview will be based on these responsibilities and standards.

REVIEWED AND ACCEPTED BY:
EMPLOYEE _____ DATE _____

APPROVED BY:
MANAGER _____ DATE _____

During my performance interview, the responsibilities and standards listed herein were utilized to evaluate my work. I have reviewed and discussed each area with my supervisor/manager. I have, also, read and understand the goals that have been established in enhancing my developmental needs for continued quality improvement. My signature acknowledges that I have read this document, but does not necessarily indicate that I agree with it.

REVIEWED AND DISCUSSED WITH:
EMPLOYEE _____ DATE _____

APPROVED BY:
SUPERVISOR _____ DATE _____

MANAGER _____ DATE _____
PROG. ADM./V. PRES./

COO/CEO _____ DATE _____
(if applicable)

RATING DEFINITIONS

- B** - Below Competency Standards - Employee does not meet competency standards.
- MS** - Meets Competency Standards Sometimes - Employee does not consistently meet competency standards.
- CM** - Consistently Meets Competency Standards - Employee consistently meets competency standards and contributes to the success of the department.
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- CE** - Consistently Exceeds Competency Standards - Employee consistently exceeds competency standards and achieves excellent results with little or no supervision.