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ABSTRACT

This document consists of two publications that were developed to help employees of a health system's department of food and nutrition improve their department's documentation. Included in the first publication, "Improving Department Documentation," are the following: a self-assessment designed to help employees rate their skills in completing department documentation and training employees, a handout explaining three learning strategies (organizing, skimming, note taking), and the following sample forms used at the health center: record of corrective action; performance appraisal; employer report of a work-related injury, illness, or exposure and accompanying supervisor's accident investigation form; and monthly quality improvement report. The second publication, "Better Documentation Writing," contains the following: brief self-assessment designed to help employees rate their skills in completing the health system's substandard performance and performance appraisal forms; copies of the substandard performance and performance appraisal forms; checklist for evaluating writing; and guidelines for business writing. (MN)

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BJC Health Systems

Improving Department Documentation

Better Documentation Writing

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Community Development Division

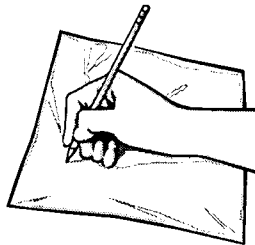
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**St. Louis Community
College**

Improving Department Documentation



**BJC Health System
Department of Food and Nutrition
St. Louis, MO**



NEW PARADIGM
for
EFFECTIVE WORKFORCE SKILLS

Self-Assessment—Overall Rating

Employee: _____ Date: _____

Evaluator: _____

Please rate yourself on a scale of 1–10 for each aspect below.

	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When completing the Corrective Action Form—	I leave portions blank; cannot state problem; lack data to complete the form.			I complete sections adequately; state action plan; lack some data.				I complete all sections neatly and thoroughly; state action plan clearly and concisely; set progress meetings; have all the necessary data.		
Comments: _____										
	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When completing the Performance Appraisal Form—	I leave portions blank; cannot state problem; lack data to complete the form.			I complete sections adequately; state action plan; lack some data.				I complete all sections neatly and thoroughly; state action plan clearly and concisely; give constructive criticism; have all the necessary data.		
Comments: _____										
	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When completing the Injury Report Form—	I leave portions blank; cannot state problem; lack data to complete the form.			I complete sections adequately; state details of injury sufficiently; lack some data.				I complete all sections neatly and thoroughly; state action plan clearly and concisely; state details of injury clearly and concisely; have all the necessary data.		
Comments: _____										

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Self-Assessment—Overall Rating (continued)

Employee: _____ Date: _____

	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When completing the Monthly Quality Report—	I leave portions blank; cannot state problem; lack data to complete the form.			I complete sections adequately; state action plan; lack some data.				I complete all sections neatly and thoroughly; state action plan clearly and concisely; set progress meetings; have all the necessary data.		

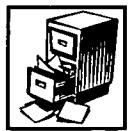
Comments: _____

	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When training employees in my department—	I don't plan; don't use training materials; do the job instead of coaching; am not comfortable training; don't ask for feedback.			I plan, but don't use consistently; coach on an inconsistent basis; use some training materials; ask for feedback, but don't incorporate ideas.				I plan; set time for training; coach on an ongoing basis; use training materials; ask for feedback and incorporate ideas.		

Comments: _____

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Organization

Table of Contents

- ***Process Tools***
- ***Food and Nutrition Department Documentation***
 1. **Record of Corrective Action**
 2. **Performance Appraisal—Form A**
 3. **Employee Report of a Work Related Injury, Illness or Exposure**
Supervisor’s Accident Investigation Form
 4. **Monthly Quality Improvement Report**

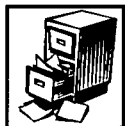


Tools for Learning

Process Tools

Use the process tools to help you learn the content.

Learning Strategies



Organization

1. Organization

Manage your documents, duties, ideas, and time.



Skim

2. Skim

Read information quickly to get the main idea.

Text Skimming

- Look for words that are **bold**, in *italics*, or underlined.
- Read the first and last sentences in each paragraph.

Graphic Skimming (charts, tables, etc.)

- Look for titles, keys, legends, and other blocks of information in columns, rows, and corners.



Note Taking

3. Note Taking

Identify your study strengths and develop a system that works for you (i.e., use highlighters, abbreviations, shorthand, outlines, etc.)



Record of Corrective Action

BJC Health System, Department of Food and Nutrition—Improving Department Documentation

Skim

BARNES-JEWISH HOSPITAL
BJC HEALTH SYSTEMSM

EMPLOYEE NAME _____

EMPLOYEE NUMBER _____

RECORD OF CORRECTIVE ACTION
(USE BACK OF FORM OR ATTACHMENTS FOR ADDITIONAL COMMENTS.)

JOB TITLE _____

DEPARTMENT _____

PERFORMANCE PROBLEMS OR INFRACTION OF POLICIES:	EXPECTED STANDARDS OF PERFORMANCE
DATE OF OCCURRENCE:	
ACTUAL PERFORMANCE:	ACTION PLAN/TIMEFRAMES FOR CHANGE:
IMPACT ON WORK GROUP/ORGANIZATION (CUSTOMER SATISFACTION, ETC.):	CONSEQUENCES OF NOT ACHIEVING ACTION PLAN:
TYPE OF CORRECTIVE ACTION: <input type="checkbox"/> 1ST WRITTEN NOTICE <input type="checkbox"/> DECISION MAKING LEAVE DATE _____ <input type="checkbox"/> DISCHARGE <input type="checkbox"/> 2ND WRITTEN NOTICE (EAP VISIT REQUIRED) EAP APPT _____	

WE HAVE DISCUSSED THE ABOVE CORRECTIVE ACTION:

MANAGEMENT SIGNATURE _____

MANAGEMENT TITLE _____

EMPLOYEE SIGNATURE _____

DATE _____

DATE _____



Skim

Record of Corrective Action

BJC Health System, Department of Food and Nutrition—Improving Department Documentation

ADDITIONAL INFORMATION OR COMMENTS:

FOLLOW UP DISCUSSION REGARDING PROGRESS TOWARD ACHIEVING ACTION PLAN:		
DATE	DISCUSSION	INITIALS

Copy Distribution:

Original - Human Resources

Photocopy - Employee

Photocopy - Department



Note Taking



Resources

BARNES-JEWISH HOSPITAL
BJC HEALTH SYSTEM™

EMPLOYEE NAME _____

EMPLOYEE NUMBER _____

JOB TITLE _____

DEPARTMENT _____

RECORD OF CORRECTIVE ACTION
(USE BACK OF FORM OR ATTACHMENTS FOR ADDITIONAL COMMENTS.)

<p>PERFORMANCE PROBLEMS OR INFRACTION OF POLICIES:</p> <ul style="list-style-type: none"> • Rule of conduct (policy book) • Offense... 	<p>EXPECTED STANDARDS OF PERFORMANCE</p> <ul style="list-style-type: none"> • Standards and Expectations form • Job Descriptions form • Wording must match offense
<p>DATE OF OCCURRENCE: _____</p> <p>ACTUAL PERFORMANCE:</p> <ul style="list-style-type: none"> • Attendance book • Employee records • Schedule • Log book <ul style="list-style-type: none"> • Employee recognition • Attendance book • Supervisor's notes • Security report • Observations 	<p>ACTION PLAN/TIMEFRAMES FOR CHANGE:</p> <ul style="list-style-type: none"> • Conference with employee • Supervisor's help employees create action plan • "Notes to file" (supervisor's file)
<p>IMPACT ON WORK GROUP/ORGANIZATION (CUSTOMER SATISFACTION, ETC.):</p> <ul style="list-style-type: none"> • Supervisor's log • Nurse's comments • Customer's comment cards • Overtime records • Other employee's attitude • Supervisor's stress level 	<p>CONSEQUENCES OF NOT ACHIEVING ACTION PLAN:</p> <ul style="list-style-type: none"> • Policy book • Human Resources • Advice from peers
<p>TYPE OF CORRECTIVE ACTION:</p> <p><input type="checkbox"/> 1ST WRITTEN NOTICE <input type="checkbox"/> DECISION MAKING LEAVE DATE _____ Records! <input type="checkbox"/> DISCHARGE</p> <p><input type="checkbox"/> 2ND WRITTEN NOTICE (EAP VISIT REQUIRED) EAP APPT _____</p>	

WE HAVE DISCUSSED THE ABOVE CORRECTIVE ACTION:

MANAGEMENT SIGNATURE _____

MANAGEMENT TITLE _____

EMPLOYEE SIGNATURE _____

DATE _____

DATE _____



Resources

ADDITIONAL INFORMATION OR COMMENTS:

Place for:

- Details
- Continuation of section from front side of form
- Comments

FOLLOW UP DISCUSSION REGARDING PROGRESS TOWARD ACHIEVING ACTION PLAN:

DATE	DISCUSSION	INITIALS
• Set a time with the employee to discuss action	• With employee • Personnel file • Human Resources	• Employee's and supervisor's

Copy Distribution:

Original - Human Resources

Photocopy - Employee

Photocopy - Department



Resources

Completing the Record of Corrective Action

Choose the phrases which appropriately report the problem/infraction from the chart below:

Attendance:

Section:	Comments
PERFORMANCE PROBLEMS OR INFRACTION OF POLICIES:	<p><u>Write</u> → As stated in the Rules of Conduct...</p> <p><u>Choose one:</u></p> <ul style="list-style-type: none"> - Violation of Rules of Conduct B-3 - Failure to follow hospital policy B-3: Attendance - B-3: Failure to follow hospital attendance policy
DATE OF OCCURRENCE:	<p><u>Report as below for 1st and 2nd offense:</u></p> <p>1) Month / Day / Year 2) Month / Day / Year</p> <p><u>Report as below for more than 2 offenses</u> — “see below”.</p> <p>Then place the number of the offense with each date in the Additional Information box.</p>
ACTUAL PERFORMANCE:	<p><u>Use this structure:</u></p> <p>_____ was absent / tardy on (fill in name) (choose one)</p> <p>_____ due to : _____ (date) (reason) (date of this infraction)</p> <p>* List all reasons of previous infractions with the dates.</p>



Resources

Notes:

Attendance:

Section:	Comments
IMPACT ON WORK GROUP/ORGANIZATION:	<p><u>Choose at least one:</u></p> <ul style="list-style-type: none"> - Failure to report for duty creates a burden on other employees and management. - Failure to report for duty as scheduled creates a burden on other employees which impacts customer service. - Failure to report for duty as scheduled affects the department's budget, e.g., food and labor.
EXPECTED STANDARDS OF PERFORMANCE:	<p><u>Write the following:</u></p> <p>_____ is expected to arrive at work <small>(fill in name)</small> as scheduled.</p> <p>Optional addition: . . . in uniform ready to perform his/her duties. <small>(choose one)</small></p>
ACTION PLAN/TIMEFRAMES FOR CHANGE:	<u>Complete this section for the third offense only.</u>
CONSEQUENCES OF NOT ACHIEVING ACTION PLAN:	



Resources

BARNES-JEWISH HOSPITAL
BJC HEALTH SYSTEMSM

EMPLOYEE NAME _____

EMPLOYEE NUMBER _____

RECORD OF CORRECTIVE ACTION
(USE BACK OF FORM OR ATTACHMENTS FOR ADDITIONAL COMMENTS.)

JOB TITLE _____

DEPARTMENT _____

Poor Job Performance

<p>PERFORMANCE PROBLEMS OR INFRACTION OF POLICIES: As stated in the policy manual</p> <ul style="list-style-type: none"> • Failure to meet standard work performance • Failure to fulfill job expectations 	<p>EXPECTED STANDARDS OF PERFORMANCE</p> <p>_____ Name _____ is expected to complete all assigned duties within scheduled time.</p>
<p>DATE OF OCCURRENCE: _____</p>	<p>ACTION PLAN/TIMEFRAMES FOR CHANGE:</p> <p>_____ Name _____ will complete all assigned consistently on a daily basis. This will be reviewed in 30 days.</p>
<p>ACTUAL PERFORMANCE:</p> <p>_____ failure to complete assigned (date)</p> <p>duties: _____ _____ _____</p>	<p>CONSEQUENCES OF NOT ACHIEVING ACTION PLAN:</p> <p>Failure to comply with action plan will result in _____.</p>
<p>IMPACT ON WORK GROUP/ORGANIZATION (CUSTOMER SATISFACTION, ETC.):</p> <ul style="list-style-type: none"> • Hardship on co-workers • Customer expectations not met • Uses excessive time to complete assigned duties 	<p>TYPE OF CORRECTIVE ACTION:</p> <p><input type="checkbox"/> 1ST WRITTEN NOTICE <input type="checkbox"/> DECISION MAKING LEAVE DATE _____ <input type="checkbox"/> DISCHARGE</p> <p><input type="checkbox"/> 2ND WRITTEN NOTICE (EAP VISIT REQUIRED) EAP APPT _____</p>

WE HAVE DISCUSSED THE ABOVE CORRECTIVE ACTION:

MANAGEMENT SIGNATURE _____

MANAGEMENT TITLE _____

EMPLOYEE SIGNATURE _____

DATE _____

DATE _____



Proofing Corrective Action

- 1. Pull employee file
 - Personnel office
 - Notes to file
 - Own records
- 2. Name → spelling
- 3. Employee number
- 4. Check date on form
- 5. Title / Level
- 6. How to manual →
- 7. Policy manual = check number
- 8. Pull all documentation needed to report
- 9. Check with HR on step
- 10. Phases =
 - Word use
 - Spelling
 - Preparations
 - Punctuation
 - Typos
- 11. Check all signatures
- 12. Check all documented information

EMPLOYEE NAME Eric Employee

EMPLOYEE NUMBER _____

JOB TITLE _____

DEPARTMENT _____

RECORD OF CORRECTIVE ACTION

(USE BACK OF FORM OR ATTACHMENTS FOR ADDITIONAL COMMENTS.)

<p>PERFORMANCE PROBLEMS OR INFRACTION OF POLICIES:</p> <ul style="list-style-type: none"> - Failure to notify management of absence - Excessive Absenteeism 	<p>EXPECTED STANDARDS OF PERFORMANCE</p> <ul style="list-style-type: none"> - Call each day of absence & notify supervisor. - Call _____ minutes before start of shift when absent. - Exert every effort to report to work as scheduled.
<p>DATE OF OCCURRENCE:</p>	<p>ACTION PLAN/TIMEFRAMES FOR CHANGE:</p>
<p>ACTUAL PERFORMANCE:</p> <p>5/2/96 - Sick (flu) 5/2/96 - Absent (car problems) 6/6/96 - No call / NO show</p>	<p>(Fill in this box with EAP action plan)</p>
<p>IMPACT ON WORK GROUP/ORGANIZATION (CUSTOMER SATISFACTION, ETC.):</p> <ul style="list-style-type: none"> - Eric's unscheduled absences create a hardship on his co-workers. - Department must find a replacement or work short-staffed. 	<p>CONSEQUENCES OF NOT ACHIEVING ACTION PLAN:</p> <p>Failure to meet with EAP, failure to commit to an action plan, or any further violation of hospital policy will result in further corrective action, up to and including termination.</p>

TYPE OF CORRECTIVE ACTION:

1ST WRITTEN NOTICE DECISION MAKING LEAVE (EAP VISIT REQUIRED) DATE _____ (EAP APPT. _____)

2ND WRITTEN NOTICE DISCHARGE

ORIGINAL — HUMAN RESOURCES

PHOTOCOPY — EMPLOYEE

PHOTOCOPY — DEPARTMENT



Resources

BARNES-JEWISH HOSPITAL
BJC HEALTH SYSTEMSM

RECORD OF CORRECTIVE ACTION
(USE BACK OF FORM OR ATTACHMENTS FOR ADDITIONAL COMMENTS.)

EMPLOYEE NAME M.
EMPLOYEE NUMBER _____
JOB TITLE _____
DEPARTMENT _____

<p>PERFORMANCE PROBLEMS OR INFRACTION OF POLICIES:</p> <p>Poor Guest Relations</p>	<p>EXPECTED STANDARDS OF PERFORMANCE</p> <p>Re: Procedures and Policy manual, page 7, paragraph 2.</p>
<p>DATE OF OCCURRENCE: 2/18/97</p>	
<p>ACTUAL PERFORMANCE:</p> <p>Rude, discourteous, neglected duties.</p>	<p>ACTION PLAN/TIMEFRAMES FOR CHANGE:</p> <p>M. will immediately respond to residents in a positive and respectful manner 100% of time while completing daily duties.</p>
<p>IMPACT ON WORK GROUP/ORGANIZATION (CUSTOMER SATISFACTION, ETC.):</p> <p>1.) Impacts expected standards of customer satisfaction.</p> <p>2.) Lowers morale and productivity.</p> <p>3.) Produce negative response.</p>	<p>CONSEQUENCES OF NOT ACHIEVING ACTION PLAN:</p> <p>Decision-making leave pending discharge.</p>
<p>TYPE OF CORRECTIVE ACTION:</p> <p><input type="checkbox"/> 1ST WRITTEN NOTICE <input type="checkbox"/> DECISION MAKING LEAVE DATE _____ <input type="checkbox"/> DISCHARGE</p> <p><input type="checkbox"/> 2ND WRITTEN NOTICE (EAP VISIT REQUIRED) EAP APPT _____</p>	

WE HAVE DISCUSSED THE ABOVE CORRECTIVE ACTION:

MANAGEMENT SIGNATURE _____

MANAGEMENT TITLE _____

EMPLOYEE SIGNATURE _____

DATE _____

DATE _____



Skim

Performance Appraisal—Form A

BJC Health System, Department of Food and Nutrition—Improving Department Documentation

BJC HEALTH SYSTEM NON-MANAGEMENT PERFORMANCE APPRAISAL / FORM A

Employee's Name		Employee Number:	
Title:		Entity: Barnes-Jewish North South Campus	
Appraisal Period From:		Purpose of Review: Annual Other	
E = Exceeds Expectations; M = Meets Expectations; I = Inconsistently Meets Expectations			
Principal Accountabilities		Weight	COMMENTS
#1			
#2			
#3			
#4			
#5			
#6			
#7			
Total Weight Must Equal:		S	
TOTAL:		E	
		M	
		I	
CIRCLE THE OVERALL RATING Superior Exceeds Expectations Meets Expectations Inconsistently Meets Expectations Unacceptable Min. 6 E's, No I's Min. 4 E's, No I's Max. 1 I Max. 3 I's 4 or more I's			

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Attendance: Comments on the Employee's Attendance and Punctuality

EMPLOYEE GROWTH AND DEVELOPMENT PLAN
 Directions: Describe the agreed upon action plan for improving performance in the employee's current job and/or developing the employee for possible future responsibilities within the organization. Include both the role of the supervisor and the role of the employee in implementing the plan.

Areas for Growth, Development and/or Improvement	Action Plan: Plans should be realistic, yet require effort and be stated in measurable terms.

Current Rate: _____ Total Increase: _____ % (Base: _____ % Lump Sum: _____ % New Rate: _____ Effective Date of Increase: _____

Signatures:

Employee Signature: _____ Date: _____
 (Your signature indicates neither agreement nor disagreement, but it does indicate that this evaluation has been discussed with you.)

Immediate Supervisor's Signature: _____ Date: _____
 Second Level Supervisor's Signature: (optional) _____ Date: _____

Employee Comments:

Distribution: Original: _____; Human Resources: _____; Copies: Department File and Employee _____

BJC HEALTH SYSTEM POSITION DESCRIPTION

Position Title: Food Service Worker II (Porter)

Effective: 7/01/96

This Position Reports to (Title): Supervisor and/or Manager

Dept: Food & Nutrition

Entity: Barnes-Jewish

Job Grade: 1

Position Purpose:

Performs a variety of food service storage functions including reception and distribution of products, storage of food, transportation and set up of finished food product on tray line or to satellite service operation as needed.

Principal Accountabilities and Essential Duties of the Job:

	% of Time
<p>1. Provides excellent service to all customers, striving to exceed their expectations, to ensure continuous quality improvement of BJC Health System's customer focus.</p> <ul style="list-style-type: none"> - Exemplifies excellent customer service towards patients, families, visitors, physicians, volunteers, and co-workers. - Shows courtesy, compassion, and respect. - Communicates with all customers in a positive and professional manner. - Contributes to teamwork and harmonious working relationships. 	on-going
<p>2. Assures quality of service by inspecting storing and rotating food products, fills requisitions and transports food to various areas.</p> <ul style="list-style-type: none"> - Inspects, rotate and store all product correctly in established time frame. - Requisition filled within established deadlines. - Food transported to and from designated areas in a timely manner. - Keep all product up to temperature when filling requisitions. 	30%
<p>3. Meet the need of the internal customers by maintaining organization of freezer, cooler.</p> <ul style="list-style-type: none"> - Maintain organization of freezer cooler daily. - Keep debris and spills off freezer and cooler floor. - Rotation for daily and weekend cleaning. - Follow proper lifting procedures. 	30%
<p>4. Assist in cost control measures by properly securing coolers and freezers.</p> <ul style="list-style-type: none"> - Monitor cooler and freezers for misplaced product. - Keep all doors to coolers and freezers closed and locked when necessary. - Keep check on cooler and freezer temperatures. 	20%
<p>5. Assist in providing a clean and safe working environment.</p> <ul style="list-style-type: none"> - Able to spot and know safety hazards and take action. - Be knowledgeable of the departments Right to Know (MSD sheets) and the fire safety plan. - Work safe - use all equipment safely. - Use safety signs and precautions at all times at work station and area. 	10%
<p>6. Performs duties in accordance with set standards and department policies.</p> <ul style="list-style-type: none"> - Maintains clean, neat and well groomed appearance. - Proper uniform is worn at all times. - Reports to work according to schedule. - Understands job responsibilities, policies/procedures. 	10%
<p>Attach optional second page if necessary.</p>	

The most significant duties have been included in this description. This does not preclude the assignment of occasional additional or developmental duties. The hospital reserves the right to modify this job description as needed to accurately reflect duties assigned.

STANDARDS & EXPECTATIONS

Position Title: Food Service Worker II (Porter)

Area: _____

Position Descriptor: _____

Hours of Shift: _____

Date: _____

PRINCIPAL ACCOUNTABILITIES:

1. Provides excellent service to all customers, striving to exceed their expectations, to ensure continuous quality improvement of BJC Health System's customer focus.

Standards:

- A. Exemplifies excellent customer service towards patients, families, visitors, physicians, volunteers, and co-workers.
- B. Shows courtesy, compassion, and respect.
- C. Communicates with all customers in a positive and professional manner.
- D. Contributes to teamwork and harmonious working relationships.

Expectations:

- 1. Make eye contact, smile, say hello to customers in the halls, offices and rooms.
- 2. When you interact with a customer, introduce yourself and say what department you are from, then refer to them as Mr. Jones or Mrs. Smith (unless they invite you to use a preferred name.)
- 3. When you're helping or working with customers, build rapport and encourage their questions with "Do you have other questions or concerns I can answer? or "What other questions do you have? I know this can be very confusing.

4. When a customer approaches you for help that you yourself cannot provide, stay involved until you find someone who can help. Provide feedback to customer on actions taken, when applicable.
5. When you're waiting on or caring for a customer, give them your full attention, discontinuing side conversations. Excuse yourself if interrupted during a conversation.
6. After a mix-up, slip-up, inconvenience or hassle for a customer, or when you have to say no (due to circumstances, policy, etc.), offer options and alternatives and a sincere apology without placing blame ... even if it's not your fault.
7. When a customer is upset, angry or critical, don't get defensive but verbally state, "I'll do whatever I can to help you," or "I'm sorry you had a bad experience. Let me see what I can do to help."
8. When you're upset with a co-worker of department, even if it is justified, don't display your negative sentiments verbally or non-verbally in front of customers. Express them directly to the people involved...in private.
9. Don't display body language and/or facial expressions that show annoyance or impatience. Maintain a positive tone of voice...with energy and a soft pitch.
10. Recognize potential service delays, explain actions taken to remedy situation. Display a sense of urgency and respond to peak service times/volumes.
11. Appearance should be neat, with proper uniform and ID badge worn above the waist at all times.
12. Clean as you go, paying close attention to dispose of litter in public areas.
13. Use good telephone etiquette by answering the telephone in 3 rings or less, stating the department/area name, your name and asking "may I help you?"

PRINCIPAL ACCOUNTABILITIES:

2. Assures quality of service by inspecting storing and rotating food products, fills requisitions and transports food to various areas.

Standard:

- A. Inspects, rotate and store all product correctly in established time frame.
- B. Requisition filled within established deadlines.



Note Taking





Skim

Employee Report... and Supervisor's... Form

BJC Health System, Department of Food and Nutrition—Improving Department Documentation

BJC HEALTH SYSTEM						ADDRESSOGRAPH OF EXPOSURE PATIENT SOURCE, IF KNOWN	
EMPLOYEE REPORT OF A WORK RELATED INJURY, ILLNESS OR EXPOSURE							
FACILITY							
YOUR NAME (LAST, FIRST, MIDDLE)							
HOME ADDRESS (STREET/CITY/STATE)						DATE OF INJURY / ILLNESS / EXP. / /	
						ZIP	
DATE OF BIRTH / /	AGE	SEX M P	MARITAL STATUS M S D W	DEPENDENTS	HOME PHONE NO. - -		
DATE OF EMPLOYMENT / /	EMPLOYEE NO.	YOUR TITLE			WORK PHONE NO. - -		
DIVISION		DEPARTMENT			STATUS FT FT PER DIEM		
YOUR REGULAR OCCUPATION			YEARS AT REG. OCCUPATION	SOCIAL SECURITY NUMBER			
YOUR OCCUPATION AT THE TIME OF INJURY (PUT "SAME" IF THE SAME AS ABOVE)				NAME THE OBJECT OR SUBSTANCE WHICH DIRECTLY INJURED YOU			
WHAT WERE YOU DOING WHEN THE INJURY / ILLNESS / EXPOSURE OCCURRED?							
WITNESSES:						PHONE #	
DESCRIBE IN DETAIL HOW THE INJURY / ILLNESS / EXPOSURE HAPPENED?							
DESCRIBE IN DETAIL YOUR INJURY INCLUDING SYMPTOMS.							
WHERE WERE YOU WHEN IT HAPPENED?	WHAT TIME WAS IT?	WHAT TIME DID YOUR SHIFT START?			HOW MANY DAYS IN A ROW DID YOU WORK?		
DO YOU WORK ANYWHERE ELSE? WHERE?							
WHAT COULD BE DONE TO PREVENT THIS IN THE FUTURE?							
EMPLOYEE SIGNATURE						DATE SIGNED / /	
SUPERVISOR'S SIGNATURE				PHONE NO.	EMPLOYEE'S COST CENTER		
REPORTED TO SUPERVISOR / /	EMPLOYEE SENT TO OCCUPATIONAL HEALTH / /	SUPERVISOR REPORT SENT TO SAFETY. / /			REPORT NO.		

1) COMPLETE THE FIRST PAGE OF THIS FORM. 2) HAVE YOUR SUPERVISOR SIGN THE COMPLETED FORM. 3) TEAR OFF THE SECOND PAGE AND GIVE IT TO YOUR SUPERVISOR. 4) TAKE THE COMPLETED FIRST PAGE TO OCCUPATIONAL HEALTH.
FORM 185-9



Skim

Employee Report... and Supervisor's... Form

BJC Health System, Department of Food and Nutrition—Improving Department Documentation

BJC HEALTH SYSTEM						OFFICE USE ONLY	
SUPERVISOR'S ACCIDENT INVESTIGATION FORM							
FACILITY							
YOUR NAME (LAST, FIRST, MIDDLE)							
HOME ADDRESS (STREET/CITY/STATE)						DATE OF INJURY / ILLNESS / EXP.	
						ZIP	
DATE OF BIRTH	AGE	SEX	MARITAL STATUS	DEPENDENTS	HOME PHONE NO.		
/ /		M P	M S D W				
DATE OF EMPLOYMENT	EMPLOYEE NO.	YOUR TITLE				WORK PHONE NO.	
/ /							
DIVISION		DEPARTMENT				STATUS	
						FT FT PER DIEM	
YOUR REGULAR OCCUPATION			YEARS AT REG. OCCUPATION	SOCIAL SECURITY NUMBER			
YOUR OCCUPATION AT THE TIME OF INJURY (PUT "SAME" IF THE SAME AS ABOVE)				NAME THE OBJECT OR SUBSTANCE WHICH DIRECTLY INJURED YOU			
WHAT WERE YOU DOING WHEN THE INJURY / ILLNESS / EXPOSURE OCCURRED?							
WITNESSES:							
TIME OF THE ACCIDENT:			LOCATION OF ACCIDENT:				
DID YOU OBSERVE ACCIDENT? YES NO			DID YOU INTERVIEW THE EMPLOYEE? YES NO				
WHAT CAUSED THE INJURY/ILLNESS/EXPOSURE?							
HOW COULD THIS ACCIDENT HAVE BEEN AVOIDED? (BE SPECIFIC.)							
CORRECTION / ACTION PLAN:							
ANTICIPATED COMPLETION DATE:							
DO YOU NEED SAFETY PERSONNEL TO ASSIST YOU? IF YES, PLEASE DESCRIBE.							
SUPERVISOR'S SIGNATURE						DATE	
MANAGERS SIGNATURE						DATE	

FORM 185-9



Note Taking

Employee Report... and Supervisor's... Form

BJC Health System, Department of Food and Nutrition—Improving Department Documentation



Skim

MONTHLY QUALITY IMPROVEMENT REPORT

Area:

Meeting Date(s)

Findings:

Conclusion:

Recommendations:

Action:

Follow-up:

SOUTH CAFETERIA MONTHLY CUSTOMER SURVEY FINDINGS

MONTH: _____

FOOD QUALITY	Excellent				Poor
	5	4	3	2	1
Entree	_____	_____	_____	_____	_____
Veg.	_____	_____	_____	_____	_____
Salad	_____	_____	_____	_____	_____
Taste	_____	_____	_____	_____	_____
Appearance	_____	_____	_____	_____	_____
Variety	_____	_____	_____	_____	_____
OVERALL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

SERVICE QUALITY	Excellent				Poor
	5	4	3	2	1
Friendliness of Staff	_____	_____	_____	_____	_____
Appearance of Staff	_____	_____	_____	_____	_____
Speed	_____	_____	_____	_____	_____
Value	_____	_____	_____	_____	_____
Quality	_____	_____	_____	_____	_____
OVERALL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

c:\excellvic\maincafetsurvey

Runner Tray Audit - Even days

	Runner	time ordered	time left kitchen	arrival time	total time
1	DB		1713	1716	3
2	DB		1713	1721	8
3	DB		1713	1721	8
4	DB		1713	1727	14
5	DB		1803	1808	5
6	DB		1803	1808	5
7	DB		1803	1810	7
8	DB		1803	1810	7
9	DB		1803	1813	10
JH10	DB		1803	1813	10
11	DB		1803	1819	16
12	DB		1803	1822	9
13	DB		1803	1824	(21)
14	DB		1803	1824	(21)
15	DB		1803	1830	(27)
16	DB		1843	1850	7
17	DB		1843	1850	7
18	DB		1900	1905	5
19	DB		1900	1910	10
20	DB		1900	1915	15
21	DB		1900	1917	17
22	DB		1925	1930	5
23	DB		1925	1933	8
24	DB		1925	1935	10
25	DB		1925	1937	12
26	DB		1925	1938	13
27	DB		1925	1938	13
28					
29					
30					

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Date: 10/29/96

1996
DEPARTMENT OF FOOD AND NUTRITION BARNES-JEWISH SOUTH
Weekly Feed Back
Week ending 10/19/96
Pay Period Ending 10/19/96

DISTRIBUTION
V. Thixon M. Shields
D. Paludin A. Wambhoff
S. Puckett P. Senft
T. Jackson G. Thomas
D. Kerkmeyer A. Conklin
G. "Mac" M. Johnson
S. Pastorek D. Jachs

WEEK	COST CENTER	TOTAL PRODUCTIVE		TOTAL NON-PRODUCTIVE		TOTAL BARNES		TOTAL PRODUCTIVE		TOTAL NON-PRODUCTIVE		TOTAL BUDGETED		TOTAL DIFFERENTIAL	
		FTE	ACTUAL	FTE	ACTUAL	BUDGETED	ACTUAL	BUDGETED	ACTUAL	BUDGETED	ACTUAL	BUDGETED	FTE	ACTUAL	WEEKLY
41	00671350	9.80	9.96	1.21	0.07	11.01	10.03	9.80	10.80	1.21	0.64	11.01	11.43	0.0	0.0
	ADMIN	391.96	398.25	48.44	2.75	440.40	401.00	16070.20	17706.65	1986.20	1043.40	18056.40	18750.05	0.0	0.0
	00671900	0.45	0.61	0.06	0.00	0.50	0.61	0.45	0.54	0.06	0.03	0.50	0.57	0.0	0.0
	EDUC	17.80	24.50	2.20	0.00	20.00	24.50	729.80	887.65	90.20	42.40	820.00	930.05	0.0	0.0
	00671700	54.78	53.31	6.77	7.85	61.55	61.16	54.78	55.52	6.77	6.94	61.55	62.46	0.4	11.9
	PROD	2191.18	2132.50	270.82	314.00	2462.00	2446.50	89838.38	91047.90	11103.62	11382.80	100942.00	102430.70	15.3	595.3
	00671650	52.36	58.71	6.47	1.60	58.83	60.31	52.36	53.94	6.47	5.17	58.83	59.11	0.4	18.8
	A.U.	2094.35	2348.25	258.85	64.00	2353.20	2412.25	85868.27	88460.25	10612.93	8481.60	96481.20	96941.85	16.3	769.2
	00671500	12.47	13.99	1.54	0.85	14.01	14.84	12.47	13.70	1.54	1.63	14.01	15.33	0.0	0.6
	INPT	498.76	559.50	61.64	34.00	560.40	593.50	20449.00	22463.20	2527.40	2677.40	22976.40	25140.60	0.0	23.9
	00671550	6.77	6.17	0.84	1.08	7.61	7.24	6.77	6.20	0.84	2.67	7.61	8.87	0.3	0.9
	OUTPAT	270.92	246.75	33.48	43.00	304.40	289.75	11107.56	10172.00	1372.84	1651.55	12480.40	11823.55	12.8	37.9
	00671300	27.16	19.59	3.36	2.83	30.52	22.42	27.16	29.11	3.36	7.44	30.52	36.55	0.3	14.6
	DIET OFF	1086.51	783.75	134.29	113.00	1220.80	896.75	44546.99	47734.50	5505.81	4373.20	50052.80	52107.70	13.5	598.7
	00670150	65.86	66.39	8.14	4.10	74.00	70.49	65.86	65.80	8.14	7.44	74.00	73.24	1.1	29.6
	CAFE	2634.40	2655.50	325.60	164.00	2960.00	2819.50	108010.40	107906.20	13349.60	12203.60	121360.00	120109.80	45.4	1213.1
	00670250	6.94	8.78	0.86	0.80	7.80	9.58	6.94	8.05	0.86	0.79	7.80	8.84	0.1	1.5
	CL-CAFE	277.68	351.00	34.32	32.00	312.00	383.00	11384.88	13201.59	1407.12	1288.10	12792.00	14489.69	4.3	60.6
	TOTAL	236.59	237.50	29.24	19.17	265.83	256.67	236.59	243.65	29.24	26.31	265.83	269.95	1.6	50.9
	DIETARY	9463.55	9500.00	1169.65	766.75	10633.20	10266.75	388005.47	399579.94	47955.73	43144.05	435961.20	442723.99	62.1	2086.4
	00670100	0.00	0.89	0.00	0.20	0.00	1.09	0.00	2.50	0.00	0.15	0.00	2.65	0.0	1.6
	4444-CAFE	0.00	35.50	0.00	8.00	0.00	43.50	0.00	4104.85	0.00	248.00	0.00	4352.85	0.0	67.4
	00291550	16.28	15.86	2.01	0.40	18.29	16.26	16.28	17.96	2.01	1.46	18.29	19.42	0.6	24.8
	TOWER REST.	651.12	634.25	80.48	16.00	731.60	650.25	26696.08	29462.10	3299.52	2389.70	29995.60	31851.80	25.9	1016.7
	DRPT	252.87	254.24	31.25	19.77	284.12	274.01	252.87	263.81	31.25	27.92	284.12	291.73	2.2	75.7
	TOTALS	10114.67	10169.75	1250.13	790.75	11364.80	10960.50	414701.55	432650.79	51255.25	45781.75	465956.80	478432.54	88.0	3103.1

Revised 4/96

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Note Taking



Resources

Job Descriptions

- 1. Head Baker**
- 2. Baker**
- 3. Butcher Shop**
- 4. Cook-Hot/Cold**
- 5. Grill-Cook**
- 6. Vegetable Preparation**
- 7. Food Service Worker I, II, III**
- 8. Prep Cold Plate, Salads, Desserts**
- 9. Beverage Station**
- 10. Coffee Bar**
- 11. Table Attendant**
- 12. Cashier**
- 13. Pot/Pan Machine Operator**
- 14. Store Room Clerk**
- 15. Sanitation**
- 16. Truck Driver**



Performance Appraisal for All Employees of the Food and Nutrition Department

General Rating Standards

Standards/Criteria for Expectations Rating:

E - Exceeds expectations

1. Consistently demonstrates a thorough understanding of the Service Excellence policy 100% of the time. (See #E1 on the Expectations Rating form for each job.)
2. Contributes to the working atmosphere of the department by maintaining a positive and constructive attitude 100% of the time.
3. Takes initiative. (i.e.- Completes own duties above and beyond standard, helps others without a supervisor request, recognizes a job to be done and does it without being asked, etc.)
4. Does not receive a corrective action within the evaluation year. (i.e.-Follows attendance policy 100%, follows procedures 100%, etc.)
5. Maintains exemplary personal hygiene 100% of the time.(i.e.- uniform, hair, etc.)

M - Meets expectations

Refer to the Standards and Expectations listed for all employees of Food and Nutrition Department.
All expectations must be followed consistently.

I - Inconsistently meets expectations

1. Demonstrates a lack of understanding of the Service Excellence policy by not being courteous or respectful toward internal or external customers. (i.e.- Body language, facial expressions, rude comments, ignoring a customer in need, etc.
2. Does not follow the dress code on a daily basis.
3. Receives 2 or more corrective actions within the evaluation period.
4. Is not flexible to change. (i.e.- refuses to learn new procedures, is not cooperative when schedule is adjusted, etc.)
5. Lacks initiative to perform duties. (i.e.- needs to be reminded to complete duties assigned, does not help co-workers, etc.)



Resources

Performance Appraisal For Head Baker

Standards/Criteria for Expectations Rating:

E - Exceeds expectations

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Accurately delegates all production assignments for all bakery staff independently.
3. Monitors bakery production procedures and reports any deviations to supervisor swiftly 100% of the time.
4. Demonstrates a thorough understanding of food handling techniques and takes the initiative to ensure proper handling. (i.e.- hot food = hot/cold food = cold)
5. Exhibits a complete understanding of the bake shop operations. Is willing to help co-workers understand the operations.
6. Demonstrates a thorough knowledge of sanitary and safety standards of the department. Acts as a model by maintaining these standards 100% of the time.

M - Meets expectations

Refer to Standards and Expectations for the Principal Accountabilities listed for the job described above.

All expectations must be followed consistently to obtain this rating.

I - Inconsistently meets expectations

1. Knowledge of the Standards and Expectations for customer service needs improvement. (i.e. rude behavior towards a customer or co-workworker noted, poor body language or facial expressions on the job, etc.)
2. Does not maintain sanitary or safety standards. (i.e.- The overall cleanliness and order of the bakery is below standards during shift.)
3. Allows inferior product to leave bakery during shift.
4. Fails to report problems in a timely manner. (i.e.- Leaves shift without communicating problems to co-workers and supervisor.)
5. Fails to properly assign production needs to all staff.



Resources

Performance Appraisal for Baker

(Job/Position)

Standard/criteria for the Ratings of:

• **E—Exceeds expectations —**

1. Consistently practices service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Takes initiative and discusses ideas with the Head Baker (i.e., creates new recipes or formulates new procedures keeping bottom line in mind).
3. Consistently maintains sanitary and safe work environment 100% of the time.
4. Sets an example for coworkers by maintaining exemplary personal hygiene in the bakery as well as the other parts of the kitchen (i.e., uniform clean, groomed hair).

• **M—Meets expectations —**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Baker

(Job/Position)

Must follow all consistently.

• **I—Inconsistently meets expectations —**

1. Knowledge of the Standards and Expectations for customer service needs improvement (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.).
2. Job performance is inconsistent and does not follow standards.
3. Lacks initiative to try new ideas without supervisor instruction.
4. Inconsistent with safety and sanitary practices as noted by a supervisor, co-worker or customer.



Resources

Performance Appraisal For Butcher Shop

Standards/Criteria for Expectations Ratings:

E - Exceeds expectations:

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Ensures that supplies and materials are stacked correctly at all times with delivery date showing. (i.e.- date facing front)
3. Requisitions filed on time while adhering to specifications and appropriate delivery time. (100%)
4. Advance prep items pulled at appropriate times without a supervisor's request. (i.e.- Understands responsibilities and follows through on an independent basis.)
5. Always maintains exceptionally clean, sanitary and safe equipment. (100%)

M - Meets expectations

Refer to Standards and Expectations for each Principal Accountability listed for the job described above.

All expectations must be followed consistently to obtain this rating.

I - Inconsistently meets expectations

1. Knowledge of Standards and Expectations for customer service needs improvement. (i.e.- rude to a customer or co-worker, disrespect shown towards others, poor body language or facial expressions, etc.)
2. Fails to check deliveries to ensure quality of product. This also includes not storing or rotating products at all times. (i.e.- Noted by Supervisor)
3. Requisitions are not filed in a timely manner, signed by a supervisor or signed by a delivery person within the period.
4. Butcher shop is not properly secured during shift. (i.e.- Supervisors are not informed of problems with freezer or coolers prior to employee leaving.)
5. Does not understand or follow safety procedures. (i.e.- Several injuries within period which could have been avoided if precautions were taken.)
6. Attendance policy infractions during appraisal period.



Performance Appraisal For Cook-Hot/Cold

Standards/Criteria for Expectations Rating:

E - Exceeds expectations

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Consistently (100%) helps maintain a harmonious atmosphere in the department by participating in team work and supporting co-workers.
3. Understands and reports safety hazards quickly and accurately during the period. (100%)
4. Understands responsibilities thoroughly and willingly acts as a mentor for other employees.

M - Meets expectations

Refer to Standards and Expectations for the Principal Accountabilities listed for the job described above.

All expectations must be followed consistently to obtain this rating.

I - Inconsistently meets expectations

1. Knowledge of Standards and Expectations for customer service needs improvement. (i.e.- rude to a customer or co-worker, use of inappropriate body language or facial expressions, etc.)
2. Does not follow the department's policy for food temperature recording. Does not take the time to learn and use the policy accurately.
3. Does not follow proper food handling standards as noted by a supervisor, co-worker or customer.
4. Fails to follow the standards for use of equipment and supplies.



Resources

Performance Appraisal for Grill Cook

(Job/Position)

Standard/criteria for the Ratings of:

• **E—Exceeds expectations –**

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Deep cleans and sanitizes grill after each usage (includes all surfaces and corners) 100% of the time.
3. Maintains sanitary and safe work environment 100% of the time. Acts as an example to other cooks.
4. Maintains exemplary personal hygiene around grill area as well as in general kitchen (i.e., clean uniform, groomed and covered hair, etc.).

• **M—Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Grill Cook

(Job/Position)

Must follow all consistently.

• **I—Inconsistently meets expectations –**

1. Knowledge of the Standards and Expectations for customer service needs improvement (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.).
2. Inflexible to changes or new ideas (i.e., does not understand new procedures, does not ask questions).
3. Fails to practice safety and sanitary procedures as specified in the manual for Grill Cooks.



Performance Appraisal For Vegetable Preparation

Standards/Criteria for Expectations Rating:

E - Exceeds expectations:

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Supplies and materials are delivered to customer ready to use immediately 100% of the time.
3. Understands sanitary and safety procedures thoroughly. (i.e.- Keeps area clean and orderly 100% of shift.)
4. Notifies supervisor immediately when equipment fails or needs repair. (100%)
5. Assists co-workers, after completing assigned duties, without being instructed by supervisor.

M - Meets expectations

Refer to Standards and Expectations for the Principal Accountabilities listed for the job described above.

All expectations must be followed consistently to obtain this rating.

I - Inconsistently meets expectations

1. Knowledge of the Standards and Expectations for customer service needs improvement. (i.e.- rude to a customer or co-worker, disrespectful to others, poor body language or facial expressions, etc.)
2. Does not follow department policies consistently. (i.e.- Supervisor corrects or completes duties for the employee within the appraisal period.)
3. Does not understand or demonstrate an appropriate work ethic or professional behavior while on the job. (i.e.- duties not completed within shift, must be reminded to complete duties by supervisor, etc.)
4. Product delivered by employee is not within the allotted time or not in a useable condition.
4. Does not maintain sanitary standards or safety conditions while completing duties during shift.



Resources

Performance Appraisal for Food Service Worker I, II, and III

(Job/Position)

Standard/criteria for the Ratings of:

• **E–Exceeds expectations –**

1. Be flexible to the needs of the department by cooperating with supervisor and maintaining a professional attitude at all times.
2. Assist all internal and external customers by _____.
3. Be willing to think independently. Perform all essential duties and meet all accountabilities as outlined in the Standards and Expectations list.
4. Be willing to be a mentor for co-workers. Help co-workers as needed without being asked by a supervisor.
5. Contributes to the team. Helps to create harmonious working relationships within the department (i.e., Refer to “E” under General Standards for the department).

• **M–Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Food Service Worker I, II, and III

(Job/Position)

Must follow all consistently.

• **I–Inconsistently meets expectations –**

1. Knowledge of the Standards and Expectations for customer service needs improvement (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.).
2. Fails to keep work area clean and sanitary as noted by a supervisor, co-worker or a customer.
3. Does not follow sanitary procedures (i.e., not using plastic gloves for food products that will undergo no further preparation).



Resources

Performance Appraisal for Prep Cold Plate, Salads, Desserts
(Job/Position)

Standard/criteria for the Ratings of:

• **E–Exceeds expectations –**

1. Consistently practices service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Consistently follows department procedures 100% of the time (i.e., follows recipes, keeps bottom line in mind, etc.).
3. Flexible to changes (i.e., understands and follows new procedures, asks questions to learn).
Willingly acts as a mentor to new employees.
4. Assists co-workers on the floor without being asked by the supervisor.

• **M–Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Prep Cold Plate/Salads/Desserts
(Job/Position)

Must follow all consistently.

• **I–Inconsistently meets expectations –**

1. Knowledge of standards/expectations for customer service needs improvement (i.e., poor body language).
2. Lacks initiative to perform duties (i.e., does not finish job during shifts, does not work well with others).
3. Inconsistent with safety and sanitary practices as noted by supervisor, co-worker or customer.
4. Does not follow procedures at all times (i.e., does not use recipes accurately, etc.).



Resources

Performance Appraisal for Beverage Station

(Job/Position)

Standard/criteria for the Ratings of:

• **E–Exceeds expectations –**

1. Consistently practices service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Consistently follows procedures on brewing coffee drinks , assessing soda level and stocking the beverage area without supervisor requests 100% of the time.
3. Consistently maintains sanitary standard and meets safe work environment 100% of work shift (i.e., beverage area free of trash and spills, floor in area clean, etc.).
4. Notifies supervisor immediately of equipment failure or repair needs 100% of the time.

• **M–Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Beverage Station

(Job/Position)

Must follow all consistently.

• **I–Inconsistently meets expectations –**

1. Knowledge of the standards and expectations for customer service needs improvement (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.).
2. Fails to be flexible to change (i.e., does not understand or learn new procedures).
3. Does not practice safety and sanitary procedures consistently as noted by supervisor, co-worker or customer.



Resources

Performance Appraisal for Coffee Bar

(Job/Position)

Standard/criteria for the Ratings of:

• **E—Exceeds expectations –**

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Creates new ideas for other food items to serve. Understands profit margin.
3. Seeks experience from other co-workers (i.e., not afraid to ask questions to understand procedures).

• **M—Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on Performance Appraisal form for Coffee Bar

(Job/Position)

Must follow all consistently.

• **I—Inconsistently meets expectations –**

1. Knowledge of Standard and Expectation for customer service needs improvement (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.)
2. Lacks initiative to perform duties (i.e., Supervisor must ask employee to complete duties more than two times).
3. Inconsistently follows safety and sanitary procedures as noted by supervisor, co-workers or customers.
4. Not flexible to change (i.e., does not accept new procedures, does not ask questions when procedures are changed, etc.).



Performance Appraisal For Table Attendant

Standards/Criteria for Expectations Rating:

E - Exceeds expectations:

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Maintains sanitary standards and orderly appearance of public areas during shift without being instructed by the supervisor. (100% of the time)
3. Understands job responsibilities, policies and procedures thoroughly. (100%) Takes the time to help co-workers understand policies.
4. Maintains a perfect attendance record by following the attendance policy 100% of the time.
5. Goes beyond the dress code by maintaining a well groomed appearance 100% of the time. (i.e.- Uniform starched, hair well groomed, etc.)

M - Meets expectations

Refer to Standards and Expectations for the Principal Accountabilities for the job described above.

All expectations must be followed consistently to obtain this rating.

I - Inconsistently meets expectations

1. Knowledge of the Standards and Expectations for customer service needs improvement. (i.e.- rude to a customer or co-worker, disrespectful to others, poor body language or facial expressions, etc.)
2. Does not understand or follow the dress code as outlined in the employee manual. (i.e.- Out of uniform or unkempt appearance reported with in the period.)
3. Fails to complete duties during shift as noted within appraisal period. (i.e.- Did not allow for proper time for reservations, lack of time for set-up.)
4. Does not follow the attendance policy within the appraisal period. (i.e.- Did not report to work according to schedule during period, call etc.)



Performance Appraisal For Cashier

Standards/Criteria for Expectations Ratings:

E - Exceeds expectations:

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Motivates self to work accurately as well as quickly. (i.e.- exceeds 3 - 5 transactions within a 5 minute period with minimal (under \$1) cash deviations.)
3. Meets sanitation levels as outlined in manual without supervisor input. Maintains this level on a daily basis.
4. Understands job responsibilities, policies and procedures and is willing to take the time to ensure that co-workers are following all.
5. Contributes to the department by maintaining a positive and constructive attitude at all times.

M - Meets expectations

Refer to Standards and Expectations for each Principal Accountability listed for the job described above.

All expectations must be followed consistently (90%) to obtain this rating.

I - Inconsistently meets expectations

1. Knowledge of Standards and Expectations for customer service needs improvement. (i.e.- rude to a customer or co-worker, disrespect shown towards others, poor body language or facial expressions, etc.)
2. Fails to follow attendance policy during the period.
3. Policy and procedures are inconsistently met during the period.
4. Cash deviations noted during the period.
5. Cash drawer not set up properly on a consistent basis during period.
6. Attention to job inconsistent. (i.e.- Items missed while charging customers.)



Resources

Performance Appraisal for Pot/Pan Machine Operator

(Job/Position)

Standard/criteria for the Ratings of:

• **E–Exceeds expectations –**

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect to both internal and external customers on a daily basis. (100%)
2. Follows sanitary procedures and maintains an orderly work environment 100% of the time.
3. Follows procedures for handling chemicals 100% of the time. Helps mentor co-workers who do not understand the proper handling of chemicals.
4. Communicates any problems or concerns by stating the facts, maintaining an open mind and avoiding gossip.

• **M–Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Pot/Pan Machine Operator

(Job/Position)

Must follow all consistently.

• **I–Inconsistently meets expectations –**

1. Knowledge of Standard and Expectations for customer service needs improvement. (i.e., rude to customer or co-workers, use of inappropriate body language or facial expressions, etc.).
2. Fails to follow procedures at all times (i.e., operating machine on improper cycle, not scraping pots and pans, etc.).
3. Not flexible to change. (i.e., when procedures change or schedule adjusted – refuses to cooperate).
4. Lacks initiative to perform duties (i.e., must be told to do job, must be reminded to complete a job, etc.).



Resources

Performance Appraisal for Store Room Clerk

(Job/Position)

Standard/criteria for the Ratings of:

• **E—Exceeds expectations —**

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Follows procedures for filing requisitions, stock rotation, labeling and receiving stock 100% of the time.
3. Consistently maintains sanitary and safe work environment 100% of the time.
4. Fills orders in a timely manner with 100% accuracy.

• **M—Meets expectations —**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Store Room Clerk

(Job/Position)

Must follow all consistently.

• **I—Inconsistently meets expectations —**

1. Knowledge of Standard and Expectation for customer service needs improvement. (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.)
2. Lacks initiative to perform duties (i.e., Asks supervisor same questions over and over, must be reminded to complete job often, etc.).
3. Inconsistently follows safety and sanitary procedures as noted by supervisors, co-workers or customer.
4. Not flexible to changes within the department (i.e., does not understand or use new procedures. Does not ask questions to clarify new procedures).



Resources

Performance Appraisal for Sanitation

(Job/Position)

Standard/criteria for the Ratings of:

• **E—Exceeds expectations –**

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Demonstrates a thorough understanding of department procedures and follows them accurately. (100%)
3. Recognizes a safety hazard and takes action to correct it immediately and independently.
4. Communicates problems from other areas of the department and contacts the appropriate supervisors (i.e., dumpster is full, plate loweruter is damaged).

• **M—Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on

Performance Appraisal form for Sanitation

(Job/Position)

Must follow all consistently.

• **I—Inconsistently meets expectations –**

1. Knowledge of Standards and Expectations for customer service needs improvement. (i.e., rude to customer or co-worker, poor body language or facial expressions, etc.)
2. Fails to complete job duties before clocking out. (i.e., noted in file two or more times).
3. Fails to put down caution signs when mopping (i.e., violation of safety procedures).
4. Fails to follow sanitary procedures (i.e., using dirty water and mop).



Resources

Performance Appraisal for Truck Driver

(Job/Position)

Standard/criteria for the Ratings of:

• **E–Exceeds expectations –**

1. Consistently demonstrates service excellence by exhibiting courtesy, compassion and respect for both internal and external customers on a daily basis. (100%)
2. Consistently maintains service of truck and equipment involved 100% of shift. If a problem exists, informs the next shift and the supervisor immediately. (i.e., lube and service).
3. Flexible and highly inventive/creative (i.e., understands new procedure, helps create new procedures).
4. Sets an example for co-workers by maintaining exemplary personal hygiene (i.e., clean uniform, groomed hair).
5. Keeps chauffeur's license up to date.

• **M–Meets expectations –**

Refer to Standards and Expectations manual for each Principal Accountability listed on Performance Appraisal form for Truck Driver

(Job/Position)

Must follow all consistently.

• **I–Inconsistently meets expectations –**

1. Knowledge of the Standards and Expectations for customer service needs improvement (i.e., rude to a customer or co-worker, poor body language or facial expressions, etc.).
2. Lacks initiative to perform duties (i.e., Asks supervisor same questions over and over, must be reminded to complete job often, etc.).
3. Does not practice safety and sanitary procedures consistently as noted by a supervisor, co-worker or customer.



**St. Louis Community
College**

Better Documentation Writing



**BJC Health System
Village North
St. Louis, MO**



NEW PARADIGM
for
EFFECTIVE WORKFORCE SKILLS

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Self-Assessment—Overall Rating

Employee: _____ Date: _____

Evaluator: _____

Please rate yourself on a scale of 1–10 for each aspect below.

	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When completing the Substandard Performance form—	I write very little, and I cannot state the problem.			I write sufficient documentation, but I lack details.				I write all the necessary information clearly with all necessary supporting details.		
Comments: _____										

	Below Average			Average				Above Average		
	1	2	3	4	5	6	7	8	9	10
When completing the Performance Appraisal form—	I leave portions blank; cannot state problem; lack data to complete the form.			I complete sections adequately; state action plan; lack some data.				I complete all sections neatly and thoroughly; state action plan clearly and concisely; give constructive criticism; have all the necessary data.		
Comments: _____										

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Note Taking

The supervisor's role in writing documentation involves:

What are the most frequent problems that you have to document?



Note Taking

Substandard Performance

BJC Health System, Village North—Better Documentation Writing



Note Taking

As supervisors, what do you need to take into consideration when documenting the following:

Attendance

Performance



Note Taking

A planned format such as the 5Ws can be helpful when you begin to write your documentation.

The 5Ws rely on the facts.

What	
When	
Where	
Who	
Why	

Material on these pages is adapted from *Documenting Discipline*, M. Deblieux, American Media Publishing



Skim

Performance Appraisal—Form A

BJC Health System, Village North—Better Documentation Writing

BJC HEALTH SYSTEM NON-MANAGEMENT PERFORMANCE APPRAISAL / FORM A

Employee's Name		Employee Number:	
Title: Food Service Worker II (Porter)	Dept.: Food & Nutrition	Entity: Barnes-Jewish	North South Campus
Appraisal Period From: 7/1/19	through 6/30/19	Purpose of Review: Annual	Other
<small>E = Exceeds Expectations M = Meets Expectations I = Inconsistently Meets Expectations</small>			
Principal Accountabilities	Weight	E	M
#1 Provides excellent service to all customers, striving to exceed their expectations, to ensure continuous quality improvement of BJC Health System's customer focus.	4		
#2 Assures quality of service by inspecting storing and rotating food products, fills requisitions and transports food to various areas.	1		
#3 Meet the need of the internal customers by maintaining organization of freezer, cooler.	1		
#4 Assist in cost control measures by properly securing coolers and freezers.	1		
#5 Assist in providing a clean and safe working environment. Performs duties in accordance with set standards and department policies.	1		
#6			
#7			
Total Weight: Must Equal	8	E	M
TOTAL:			
CIRCLE THE OVERALL RATING Superior Exceeds Expectations Meets Expectations Inconsistently Meets Expectations Unacceptable Min. 6 E's: No I's Min. 4 E's: No I's Max. 1 I Max. 3 I's 4 or more I's			

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Skim

Attendance: Comments on the Employee's Attendance and Punctuality

EMPLOYEE GROWTH AND DEVELOPMENT PLAN

Directors: Describe the agreed upon action plan for improving performance in the employee's current job and/or developing the employee for possible future responsibilities within the organization. Include both the role of the supervisor and the role of the employee in implementing the plan.

Areas for Growth, Development, and/or Improvement	Action Plan: Plans should be realistic, yet require effort and be stated in measurable terms.

Current Rate: _____ Total Increase: _____ % (Base: _____ % Lump Sum: _____ % New Rate: _____ Effective Date of Increase: _____

Signatures:

Employee Signature: _____ Date: _____
 (Your signature indicates neither agreement nor disagreement, but it does indicate that this evaluation has been discussed with you.)

Immediate Supervisor's Signature: _____ Date: _____
 Second Level Supervisor's Signature: (optional) _____ Date: _____

Employee Comments:

Distribution: Original: _____ Entity: Human Resources _____ Copies: Department File and Employee _____

BJC HEALTH SYSTEM POSITION DESCRIPTION

Position Title: Food Service Worker II (Porter)

Effective: 7/01/96

This Position Reports to (Title): Supervisor and/or Manager

Dept: Food & Nutrition

Entity: Barnes-Jewish

Job Grade: 1

Position Purpose:

Performs a variety of food service storage functions including reception and distribution of products, storage of food, transportation and set up of finished food product on tray line or to satellite service operation as needed.

Principal Accountabilities and Essential Duties of the Job:

	% of Time
<p>1. Provides excellent service to all customers, striving to exceed their expectations, to ensure continuous quality improvement of BJC Health System's customer focus.</p> <ul style="list-style-type: none"> - Exemplifies excellent customer service towards patients, families, visitors, physicians, volunteers, and co-workers. - Shows courtesy, compassion, and respect. - Communicates with all customers in a positive and professional manner. - Contributes to teamwork and harmonious working relationships. 	on-going
<p>2. Assures quality of service by inspecting storing and rotating food products, fills requisitions and transports food to various areas.</p> <ul style="list-style-type: none"> - Inspects, rotate and store all product correctly in established time frame. - Requisition filled within established deadlines. - Food transported to and from designated areas in a timely manner. - Keep all product up to temperature when filling requisitions. 	30%
<p>3. Meet the need of the internal customers by maintaining organization of freezer, cooler.</p> <ul style="list-style-type: none"> - Maintain organization of freezer cooler daily. - Keep debris and spills off freezer and cooler floor. - Rotation for daily and weekend cleaning. - Follow proper lifting procedures. 	30%
<p>4. Assist in cost control measures by properly securing coolers and freezers.</p> <ul style="list-style-type: none"> - Monitor cooler and freezers for misplaced product. - Keep all doors to coolers and freezers closed and locked when necessary. - Keep check on cooler and freezer temperatures. 	20%
<p>5. Assist in providing a clean and safe working environment.</p> <ul style="list-style-type: none"> - Able to spot and know safety hazards and take action. - Be knowledgeable of the departments Right to Know (MSD sheets) and the fire safety plan. - Work safe - use all equipment safely. - Use safety signs and precautions at all times at work station and area. 	10%
<p>6. Performs duties in accordance with set standards and department policies.</p> <ul style="list-style-type: none"> - Maintains clean, neat and well groomed appearance. - Proper uniform is worn at all times. - Reports to work according to schedule. - Understands job responsibilities, policies/procedures. 	10%
<p>Attach optional second page if necessary.</p>	

The most significant duties have been included in this description. This does not preclude the assignment of occasional additional or developmental duties. The hospital reserves the right to modify this job description as needed to accurately reflect duties assigned.

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Job Complexity: * Level 1 ___ Level 2 ___ Level 3 ___ Level 4 ___ Level 5

Impact of Decision-making Errors: * Level 1 ___ Level 2 ___ Level 3 ___ Level 4

Position in the organization: * Staff ___ Clerical ___ Analyst ___ Coordinator ___ Lead ___ Specialist
Supervisor Manager Director VP/Executive

Age Category of Patients Served: Check all age categories of patients served.
(Required by JCAHO for patient care givers.)
N/A < 1 year 1-16 16-49 50 and over

Exposure to blood/body fluid: (Required by OSHA) Yes No

Education and Experience: Check the minimum requirements for education & experience. The education or experience preferred may be listed on the line provided.

Education:

Basic skill set
___ High school or equivalent (GED)
___ High school plus specialized training (minimum of 6 months to 2 years)
___ Associate degree
___ Bachelor's degree in _____
(appropriate field)
___ Master's degree
___ Ph.D.
___ M.D.

Preferred: High School or Equivalent (GED)

___ Certification/Licensure Required for Job:

Experience: (Check Appropriate Lines)

Technical Field	Supervision
___ no experience	___ 0 to 2 yrs.
<input checked="" type="checkbox"/> 3 months to 1 yr.	___ 3 to 4 yrs.
___ 1 yr. to 3 yrs.	___ 5 to 7 yrs.
___ 3 yrs. to 5 yrs.	___ 8 to 10 yrs.
___ > 5 yrs.	___ > 10 yrs.

Preferred: _____

Other Knowledge, Skills, Abilities Required:

Physical Activity: Check all that apply.

	NA	0-25%	26-75%	76-100%	Avg. Lbs.
Lift/Carry	___	___	<input checked="" type="checkbox"/>	___	<u>50</u>
Push/Pull	___	___	<input checked="" type="checkbox"/>	___	___
Reach overhead	___	<input checked="" type="checkbox"/>	___	___	___
Climb	<input checked="" type="checkbox"/>	___	___	___	___
Squat/Bend/Kneel	<input checked="" type="checkbox"/>	___	___	___	___
Sit	___	<input checked="" type="checkbox"/>	___	___	___
Stand	___	___	___	<input checked="" type="checkbox"/>	___
Walk/move about	___	___	___	<input checked="" type="checkbox"/>	___

Working conditions: Check all the boxes that describe the environment.

temperature Move from hot kitchen to cold cooler or walk in _____

noise Moderate _____

chemicals or hazardous material/waste handled or present ___ General cleaning compounds _____

Tools Used Cambro carts, mop, buckets, brooms _____

Equipment operated _____

* For definitions see reverse side.

STANDARDS & EXPECTATIONS

Position Title: Food Service Worker II (Porter)

Area: _____

Position Descriptor: _____

Hours of Shift: _____

Date: _____

PRINCIPAL ACCOUNTABILITIES:

1. Provides excellent service to all customers, striving to exceed their expectations, to ensure continuous quality improvement of BJC Health System's customer focus.

Standards:

- A. Exemplifies excellent customer service towards patients, families, visitors, physicians, volunteers, and co-workers.
- B. Shows courtesy, compassion, and respect.
- C. Communicates with all customers in a positive and professional manner.
- D. Contributes to teamwork and harmonious working relationships.

Expectations:

1. Make eye contact, smile, say hello to customers in the halls, offices and rooms.
2. When you interact with a customer, introduce yourself and say what department you are from, then refer to them as Mr. Jones or Mrs. Smith (unless they invite you to use a preferred name.)
3. When you're helping or working with customers, build rapport and encourage their questions with "Do you have other questions or concerns I can answer? or "What other questions do you have? I know this can be very confusing.

4. When a customer approaches you for help that you yourself cannot provide, stay involved until you find someone who can help. Provide feedback to customer on actions taken, when applicable.
5. When you're waiting on or caring for a customer, give them your full attention, discontinuing side conversations. Excuse yourself if interrupted during a conversation.
6. After a mix-up, slip-up, inconvenience or hassle for a customer, or when you have to say no(due to circumstances, policy, etc.), offer options and alternatives and a sincere apology without placing blame ...even if it's not your fault.
7. When a customer is upset, angry or critical, don't get defensive but verbally state, "I'll do whatever I can to help you," or "I'm sorry you had a bad experience. Let me see what I can do to help."
8. When you're upset with a co-worker of department, even if it is justified, don't display your negative sentiments verbally or non-verbally in front of customers. Express them directly to the people involved...in private.
9. Don't display body language and/or facial expressions that show annoyance or impatience. Maintain a positive tone of voice...with energy and a soft pitch.
10. Recognize potential service delays, explain actions taken to remedy situation. Display a sense of urgency and respond to peak service times/volumes.
11. Appearance should be neat, with proper uniform and ID badge worn above the waist at all times.
12. Clean as you go, paying close attention to dispose of litter in public areas.
13. Use good telephone etiquette by answering the telephone in 3 rings or less, stating the department/area name, your name and asking "may I help you?"

PRINCIPAL ACCOUNTABILITIES:

2. Assures quality of service by inspecting storing and rotating food products, fills requisitions and transports food to various areas.

Standard:

- A. Inspects, rotate and store all product correctly in established time frame.
- B. Requisition filled within established deadlines.



Note Taking

To get to the facts, it may be useful to use your senses.

I saw.

I heard.

I touched.

I smelled.

I tasted.

Here are examples of factual statements which use your senses.

Conclusion	Fact
You were late.	I saw you report to your desk at 8:35 a.m. (Sight.)
You are a thief.	I heard you tell Fred that you took the money. (Hearing.)
You didn't clean the walls.	When I ran my hands over the walls, I could feel the oil. (Touch.)
The linens were not washed correctly.	When I smelled the new laundry, it smelled sour. (Smell.)
You were drinking on the job.	I saw you drink from the glass on your desk. When I tasted the liquid in it, it tasted like vodka. (Taste.)



Checklist for Evaluating Your Writing

Is it organized?

- Did you cover all the facts?
- Did you present it logically?

Is it concise?

- Did you get to the point quickly?
- After reading the text, did you remove excess words?

Is it clear?

- Are words and phrases expressive?

Is the tone appropriate to the subject?

- Do you convey a polite and businesslike feeling?
- Did you remain objective?

Is it mechanically correct?

- Did you check punctuation?
- Did you check grammar?
- Did you check spelling?



Checklist for Evaluating Your Writing

- K.I.S.S—Keep It Short and Simple.**
- Take yourself out of the picture: Use third-person point of view.**
 - Say:—The employee was told to report on time.
 - Not:—I told the employee to report on time.
- State the facts, not your opinions.**
 - Say:—The employee failed to follow hospital policy.
 - Not:—The employee is insensitive to hospital policy.
- Edit and proofread your work.**
 - Remember: The documentation you write may be read by many people.

Examples of Appropriate Phrasing and Language.

- Absenteeism**
 - Say:—Repeated, unexcused absences
 - Say:—Employee accumulated (#) points as of (date).
 - Say:—Employee must maintain attendance according to department work schedule.
- Performance**
 - Say:—Employee used foul and abusive language, *or* Employee responded using foul and abusive language.
 - Not:—Employee cursed at me, *or* Employee was hostile, *or* Employee has an attitude.
- Impact of Performance**
 - Say:—Employee's actions have a negative impact on (something).
 - Remember to back this up with specifics. *Tell why* it is negative.
 - Does it affect productivity? Cost?



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