

COORDINATOR, EMPLOYEE BENEFITS & SUPPORT SERVICES
Summative Appraisal Form

Name _____

Location _____

Appraisal Period: From _____ to _____

Date of Review _____

Directions

The following statements describe the employee who achieves success. Based on cumulative performance information, the evaluator estimates the employee's effectiveness in meeting each criterion. Rate each criterion using the scale below that most closely describes the employee's attainment of that criterion. For each domain, a comment area is provided for general statements and/or recommendations.

Rating Scale

- 5 Clearly Outstanding:** Performance is consistently far superior to what is normally expected.
- 4 Exceeds Expectations:** Performance demonstrates increased proficiency and is consistently above expectations.
- 3 Meets Expectations:** Performance meets expectations and presents no significant problems.
- 2 Below Expectations:** Performance is consistently below expectations and significant problems exist.
- 1 Unsatisfactory:** Performance is consistently unacceptable.
- 0 Not Applicable**

JOB PERFORMANCE STATEMENTS

- ___ 1. Directs and manages the District's Employee Benefits Program and District Health Plan. Coordinates and administers the day-to-day operations of the health and optional benefits programs to include claims for group health insurance, dental, vision, disability, life, and medical reimbursement and other optional insurances.
- ___ 2. Coordinates the annual open enrollment process, review all employee benefit enrollments and change forms, and ensure that all are processed within required time limits including payroll deadlines.
- ___ 3. Provides timely notice to employees under the requirements of the Consolidated Omnibus Budget Reconciliation Act (COBRA) and Health Insurance Portability and Accountability Act (HIPAA).
- ___ 4. Resolves administrative employee benefit inquiries to ensure quick, equitable, and courteous resolution and act as liaison between employees and insurance carrier's claims office with the assistance of Third Party Administrator.
- ___ 5. Works cooperatively with Payroll Department and Human Resources to process and coordinate deductions for employee leave of absence, including those relating to workers' compensation claims.
- ___ 6. Assists in the preparation of Employee Benefits Handbook, reviews redline, and required updates in accordance with the HealthCare Reform in conjunction with the District Insurance Consultant and Chief Human Resources Officer and coordinate printing of plan book and cards.

- ___ 7. Monitors and reviews periodic claims and reports and provide trend analysis (utilizing services of the District Insurance Consultant) for all lines of insurance coverage.

COMMENTS: _____

Wellness

- ___ 8. Manages the district’s wellness program including strategic planning, recommendations and implementation of program components, process development and communications delivery to all users.

- ___ 9. Develops and coordinates wellness activities throughout the district in an effort to lower the cost of healthcare premiums, to serve as role models for the community, and to ensure a better quality of life for all participants.

- ___ 10. Coordinates the Flu Shot Clinics in compliance with HB 1204.

- ___ 11. Prepares and distributes Employee Benefits Quarterly Newsletter in an effort to promote the flow of information related to health benefits and upcoming events related to the Employee Benefits department.

COMMENTS: _____

District Records Retention Program

- ___ 12. Manages the on-going maintenance of centralized district records retention, including identification of records for storage, retrieval of records, and the coordination of annual records’ processing and destruction as per approved records retention schedule. Acts as the Records Management Officer (RMO) for the district.

- ___ 13. Obtains proposal from RCI on the annual fees for records retention and storage as per state guidelines, and follows through with scheduling dates and oversees completion of the proposal agreement.

COMMENTS: _____

Worker’s Compensation and Unemployment

- ___ 14. Reviews and responds to all unemployment claims and worker’s compensation claims, prepares appeals and attends hearings when necessary.

- ___ 15. Prepares and submits the TASB Loss Prevention Grant.

- ___ 16. Maintains and distributes insurance forms and supplies to campuses and other district buildings.

COMMENTS: _____

Support Services

MAC/SHARS Program

- ___ 17. Coordinates the District MAC/SHARS Programs and work in conjunction with the Special Ed Director and Director of Family Services. Conducts training for employees selected for Random Moment Time Study on a quarterly basis.

Cell Phones

- ___ 18. Coordinates cell phone distribution for eligible district employees. Reviews monthly bills for excessive use or calls not related to district business and report such to the Superintendent.

District Mail Services

- ___ 19. Supervises the district mail carriers to ensure prompt and accurate delivery of intercampus and district US mail.

Federal Impact Aid

- ___ 20. Conducts an annual district survey to identify students eligible for inclusion in the annual impact aid applications and submit submits Federal Impact Aid Grant to the Department of Education on an annual basis.

United Way Campaign

- ___ 21. Coordinates the district-wide annual United Way Campaign.

District Nurses

- ___ 22. Maintains ongoing communication with the district Head Nurse on supplies and equipment purchase.

COMMENTS: _____

Supervisory Responsibilities

- ___ 23. Implements the Employee Benefits policies established by federal and state law, and local board policies.
- ___ 24. Attend training sessions/conferences to enhance professional skills and knowledge.
- ___ 25. Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.
- ___ 26. Evaluates job performance of employees to ensure effectiveness regarding their professional growth; work jointly with them to develop and accomplish improvement goals.
- ___ 27. Prepare and administer department budget. Monitor and authorize expenditures in accordance with established guidelines.

COMMENTS: _____

Other

- ___ 28. Maintain confidentiality of information.
- ___ 29. Perform all other task and duties as assigned.

COMMENTS: _____

What strengths does _____ possess?

What are some improvements _____ can make to ensure a higher degree of success?

Summative Conference Comments:

Recommendation of Evaluator: I have read and received a copy of this evaluation. I have reviewed this instrument.

- Renewal and/or Extension of Assignment
- Non-renewal of Assignment
- Termination of Assignment
- Non-extension of Assignment

Administrator (Print Name)

Date

Administrator's Signature

Date

Employee's Signature

Date