


WHAT'S *Right* IN HEALTH CARE





WHAT'S *Right* IN HEALTH CARE™

Using Staff Evaluation to Drive Pillar Outcomes

David Crouch
Dir of OD / CLO, Blue Ridge HealthCare, Morganton, NC

Penelope Elebash
Solutions Specialist, Studer Group, Gulf Breeze, FL



Presentation Objectives

- Align individual performance to drive team and organizational outcomes
- Implement the 7-step evaluation process to build individual accountability and excellence in staff performance

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Why?

- **The essence of organizational excellence lies in the quality of the individual's performance**

Why?

- Align individual performance to team and organizational outcomes
- Create consistent daily conversation that builds individual accountability
- Minimize bias in the discussion – explanations of ratings and specific descriptions to organization and job
- Pay for performance & differentiate high performance
- Factor in leader performance score with staff and staff performance score with leaders

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Alignment & Tools



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Pillar Results



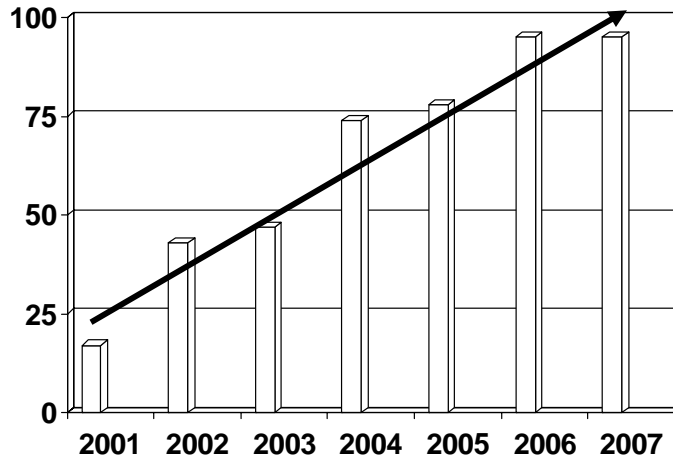
- **Quality: Improved Patient Safety**
- **Service: Increased Patient Satisfaction**
- **People: Reduced Turnover**
 - Blue Ridge: 28% to 14% reduction; \$3,808,000
- **Growth: Increased Volume**
- **Finance: Improved Productivity & Operating Margin**
 - Blue Ridge: 50% time savings over 2 years; \$68,000
 - Blue Ridge: 2.8% to 3.9% margin; \$1,113,750

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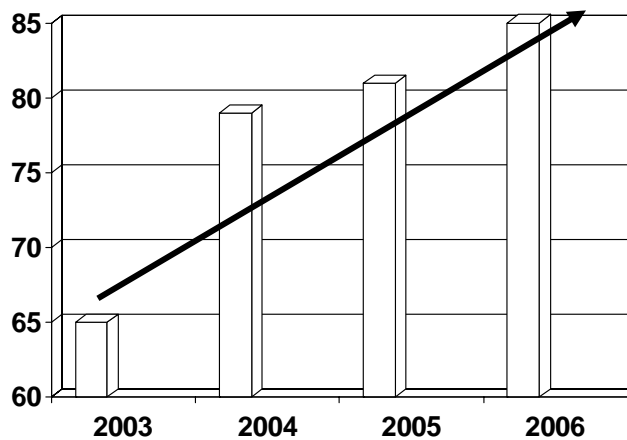
Grace Hospital Emergency Department



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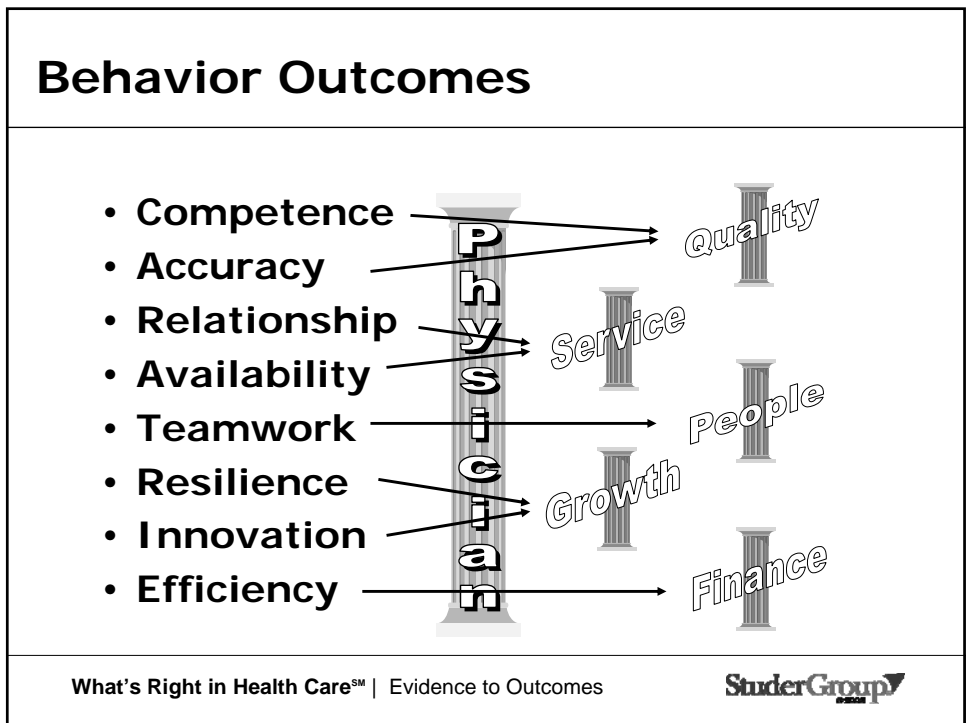
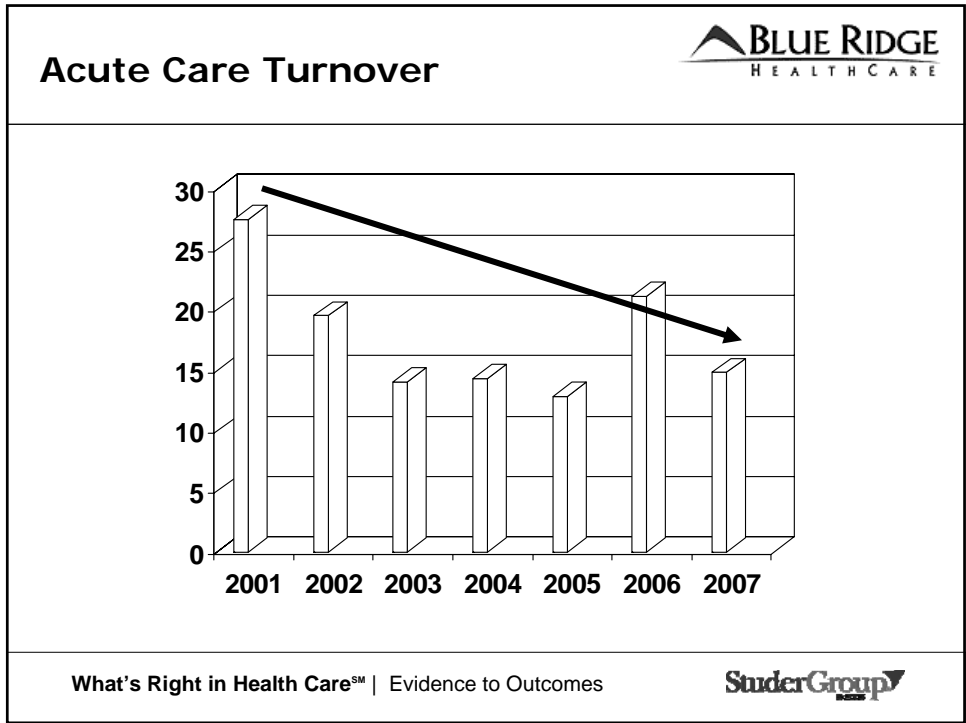
Employee Satisfaction



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General Guidelines

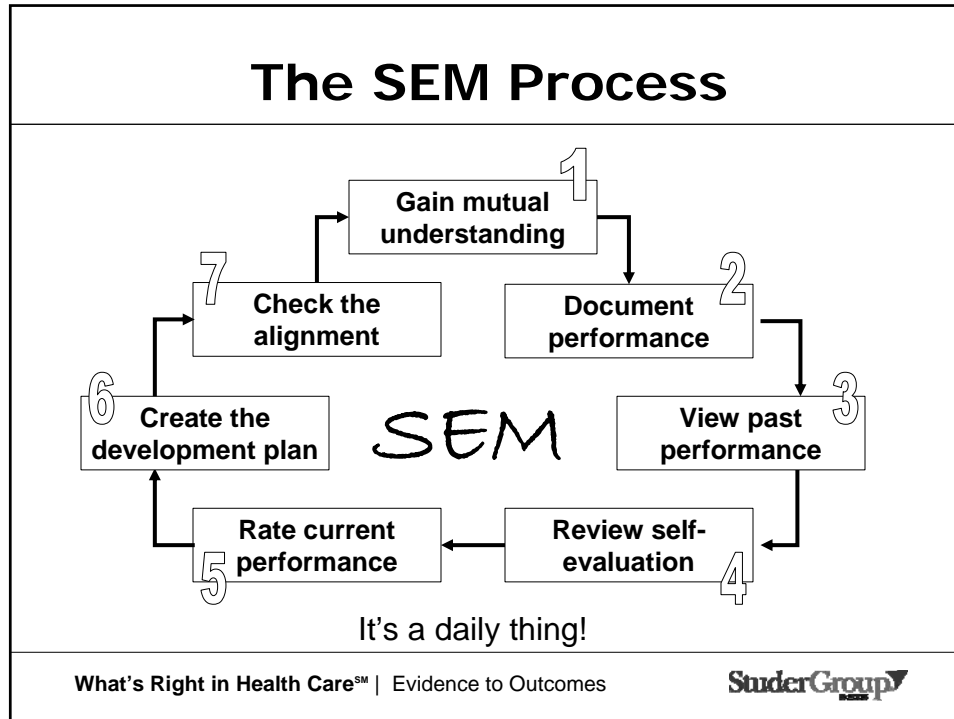
- Help guide the leader and employee in determining a rating
- Apply to all job roles in the organization
- Includes descriptions of observed behaviors and instructions on how to rate
- Includes the **standards**
- Addresses **competencies**



Job Specific Guidelines

- Guidelines specific to the job role
- Created and edited by the leader or HR
- Combination of subjective and objective rating criteria
- The more objectivity the better
- Templates provided in the software to help you get started

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Mutual Understanding 1

Gain mutual understanding

- **Leader's objective**
 - Develop such a strong understanding of performance expectations and measurements with their employee that when the employee evaluates their own performance, they rate it the same as the leader would.
 - A mature working relationship
 - Consistent excellence becomes achievable

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Leader Action

Gain mutual understanding **1**

• New Employee

- Meet with each individual as much as it takes to gain mutual understanding
 - Once/wk first 90 days
 - Once/month first year
 - Once/quarter ongoing
- Reinforce behaviors every day
 - Notice good work
 - Use the terminology
 - Talk to them

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Weekly Meeting Format

Gain mutual understanding **1**

1. How are you doing so far?
 - Review schedule and key concerns
2. What issues exist that I can help you with?
 - Review actions planned forward
3. Review key orientation material from the weekly meeting outline.
 - Recap learnings from previous week
 - Recap actions for coming week
4. What else do you need from me to be successful?
5. Review and prepare for next meeting.

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Leader Action

Gain mutual understanding ¹

• Current Staff

- Have each staff member read the SEM White Paper
- Go over new behavior expectations in team meetings
- Conduct mock evals within 1st quarter
- Follow up individually as needed
- Reinforce behaviors every day
 - Notice good work
 - Use the key words

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Staff Evaluation Manager

StuderGroup
Save Logout

EVALUATION PREPARATION
DEPARTMENT EVALUATION
REPORTS
SEM ADMIN
PROFILE
ACCOUNTS

Interim Evaluation for Carrie

Carrie Early
Evaluation Score = 4.2

Performance Documentation
Past Evaluations
Development Plans
Get Self Evaluation Form
Get completed Evaluation Form

Quality: Accuracy

Safe, careful, precise delivery of care and service that lacks errors and conforms exactly to standards and targets. Do you deliver your products and services safely, accurately, and timely?

Standard	Explanation of Rating
<input type="radio"/> Unacceptable Job Specific Guidelines General Guideline	<input type="radio"/> Needs To Improve Job Specific Guidelines General Guideline
<input type="radio"/> Fully Successful Job Specific Guidelines General Guideline	<input checked="" type="radio"/> Superior Job Specific Guidelines General Guideline
	<input type="radio"/> Distinguished Job Specific Guidelines General Guideline

Service: Relationship

Connectivity created through service to others. Do you build a strong, positive relationship with every guest you serve, both internal and external, and work diligently to meet their needs?

Standard	Explanation of Rating
<input type="radio"/> Needs Improvement Job Specific Guidelines General Guideline	<input type="radio"/> Fully Successful Job Specific Guidelines General Guideline
<input type="radio"/> Needs Improvement Job Specific Guidelines General Guideline	<input checked="" type="radio"/> Distinguished Job Specific Guidelines General Guideline

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Interim Evaluation for Carrie Early Standards

Carrie Early

Performance Documentation | Past Evaluations | Development Plans | Get Self Evaluation Form | Get completed Evaluation Form

Evaluation Score = 4.2

Quality: Accuracy

Safe, careful, precise delivery of care and service that lacks errors and conforms exactly to standards and services safely, accurately, and timely?

Weighted Value = 10 | Score = 0.4 | Self-Eval Selection = Superior

Standard	Explanation of Rating
<input type="radio"/> Unacceptable Job Specific Guidelines General Guideline	<input type="radio"/> Needs To Improve Job Specific Guidelines General Guideline
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Quality: Competence

Qualified and capable, exhibiting sufficient skill and knowledge to effectively complete assigned tasks. Do your guests and team mates view you as a content expert in your area of expertise?

Weighted Value = 10 | Score = 0.4 | Self-Eval Selection = Superior

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<input type="radio"/> Unacceptable Job Specific Guidelines General Guideline	<input type="radio"/> Needs To Improve Job Specific Guidelines General Guideline
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Service: Relationship

Connectivity created through service to others. Do you build a strong, positive relationship with every guest you serve, both internal and external, and work diligently to meet their needs?

Weighted Value = 20 | Score = 1 | Self-Eval Selection = Distinguished

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<input type="radio"/> Unacceptable Job Specific Guidelines General Guideline	<input type="radio"/> Needs To Improve Job Specific Guidelines General Guideline
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Close Evaluations Trusted sites 100%

Document Performance

Document performance

- Observe performance daily and provide feedback
- Document notable occurrences
 - Notice good work
 - Deal with substandard work immediately
- Require documented evidence of performance for anything other than "fully successful".
- Reduce recency bias and gunny-sacking

Leader Action

Document performance ²

- Document performance observations daily
 - At beginning or end of day, document any significant performance observations in the appropriate behavior outcome area.
 - If you haven't already reinforced this behavior face-to-face with your employee, do so as soon as possible.
 - *Note: this is the single most important action of effective performance appraisal*
 - *This is H-M-L on demand*

View past performance

View past performance 

- Performance documentation
 - Leader
 - Employee
- Past performance reviews
- Progress with development plans
- “What, if anything, has changed since the last formal review?”

Leader Action

View past performance 

- Schedule a meeting with the employee
- Request they review the eval guidelines and complete their self-eval at least 48 hours prior to the meeting
- Review most recent documented evaluation
 - Ask yourself “what’s changed since then?”
- Review documented performance observations

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Staff Evaluation Manager StuderGroup

EVALUATION PREPARATION | DEPARTMENT EVALUATION | REPORTS | SEM ADMIN | PROFILE | ACCOUNTS Save Logout

Interim Evaluation for Carrie Early

Carrie Early

Performance Documentation | Past Evaluations | Development Plans | Get Self Evaluation Form | Get completed Evaluation Form

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Close Evaluations Trusted sites 100%

Review Self-Eval

Review self-evaluation 4

- Require at least 48 hours prior to formal discussion
- What are they thinking?
- Prepares the leader for the discussion
 - Good or bad

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Rate Performance

Rate current
performance

5

- Fair, consistent, accurate, honest, timely
- Against behavior outcome standards
 - General and job specific
- Use the 5 point rating scale
 - Either by individual
 - Or by behavior outcome
- **Behavior outcome** – desired outcomes of an individual's behavior; as opposed to attributes or characteristics

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Leader Action

Rate current
performance

5

- Review rating guidelines (if necessary)
- Prepare your ratings
 - But remain flexible to do what's right
- Evaluate by behavior outcome
- Evaluate by staff member

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Staff Evaluation Manager
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Save | Logout

Interim Evaluation for Carrie Early

Job Specific

Carrie Early
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Standard Explanation of Rating

Unacceptable
[Job Specific Guidelines](#)
[General Guideline](#)

Needs To Improve
[Job Specific Guidelines](#)
[General Guideline](#)

Fully Successful
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Close Evaluations

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Quality: Competence

By individual

Qualified and capable, exhibiting sufficient skill and knowledge to effectively complete assigned tasks. Do your guests and team mates view you as a content expert in your area of expertise?

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Standard Explanation of Rating

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[Job Specific Guidelines](#)
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Close Evaluations

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EVALUATION PREPARATION | DEPARTMENT EVALUATION | REPORTS | SEM ADMIN | PROFILE | ACCOUNTS [Save] [Logout]

Evaluation by Behavioral Outcome

Select Pillar Behavioral Outcome
Service Relationship

Staff Members	Unacceptable General Guideline	Needs To Improve General Guideline	Fully Successful General Guideline	Superior General Guideline	Distinguished General Guideline
Jane Riggsbee	Larry Leach	Sally Slacker	Susan Masefield		Polly Perfect
Mike Hefner					
Joe Smith					
Lisa Keller					
Carrie Early					
Jackie Lawrence					
Scottie Rector					
Kathy Laing					

By behavior outcome

Trusted sites 100%

Create Development Plan

Create the development plan

- Anything rated less than fully successful should have an action plan
- Anything can be improved with an action plan

Leader Action

6
Create the development plan

- Have the staff member create their own development plan
 - Ensure areas of interest to you are included.
 - Saves you time
 - Holds them accountable
- Enter the plan into the SEM software.
- Monitor progress on the plan throughout the following period.

The screenshot displays the Staff Evaluation Manager web application. At the top, the title "Staff Evaluation Manager" is on the left and the StuderGroup logo is on the right. A navigation menu includes "Evaluation Preparation", "Reports", "Department Evaluation", "SEM Admin", "Profile", and "Accounts", with a "Logout" button. The main heading is "Development Plans for Carrie Early 333333333". Below this, a dropdown menu shows "Carrie Early 333333333" and a button for "Development Resources and Opportunities". There are two date pickers: "Start Date" set to 1/5/2006 and "Stop Date" set to 05/02/2007, with a "Submit Selections" button between them. The page is divided into two sections: "Outcome" and "Development Plan by Outcome". The "Outcome" section has a "Quality" dropdown set to "Accuracy" and a text area containing: "Safe, careful, precise delivery of care and service that lacks errors and conforms exactly to standards and targets. Do you deliver your products and services safely, accurately, and timely?". The "Development Plan by Outcome" section shows "Target Completion date: 12/31/2007", "MU: 1", "Action Step: Attend a class on safety", and "Result: Attended on 8-30-07". A callout box with a "6" and the text "Create the development plan" is overlaid on the right side of the development plan area. An "Edit" button is at the bottom of the development plan section. The browser status bar at the bottom shows "Trusted sites" and "100%".

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7
Check the alignment

Target Alignment
+/- .25

BLUE RIDGE LEADER PERFORMANCE EVALUATION			
	Weight	Performance Category	SCORE
OVERALL	70%	Overall Pillar Performance Score	3.60
	10%	Overall Behavior Performance Score <small>(Attach completed copy of Employee Evaluation form)</small>	4.00
	20%	Corporate Scorecard Score	3.00
	100%	Total Performance Score	3.55

Employee Name	Overall Performance Score
John Doe	3.2
Sally Silly	2.8
Bill Brilliant	4.0
Jane Jolly	3.4
Sam Superstar	4.7
Holly High Performer	3.6
Darin Dud	2.9
Department Average	3.43

$$3.60 - 3.43 = .17$$

$$.17 < .25$$

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7
Check the alignment

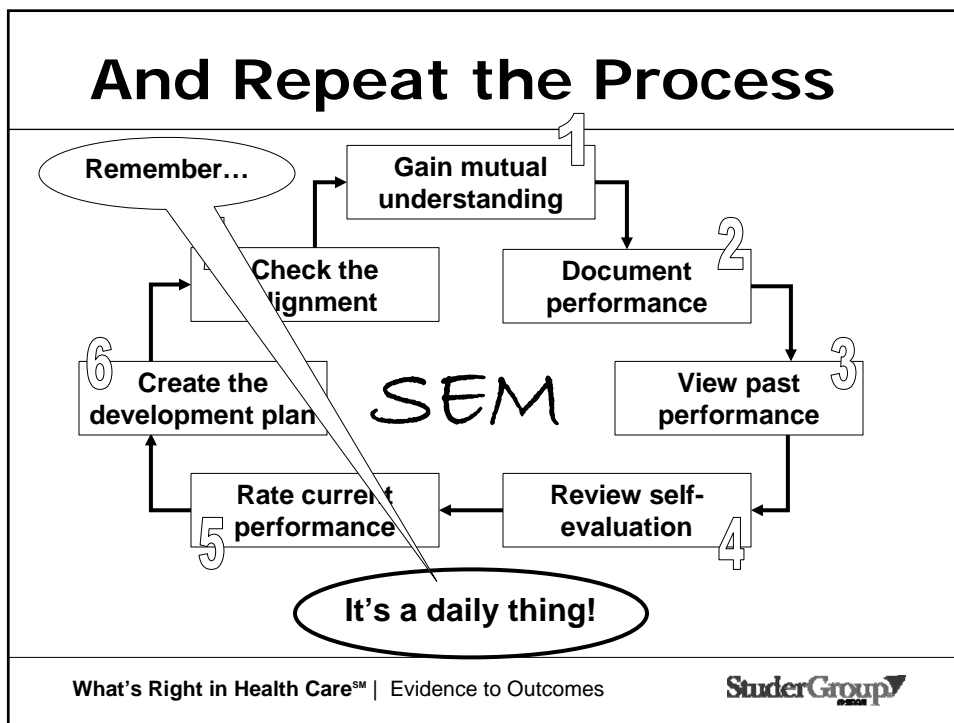
Leader Action

- Average all staff evals together.
- Compare the average to your LEM score for the same period.
- If the variance is greater than +/- .25, problem solve why.
 - Either your LEM is too soft, or
 - You have biased staff ratings in SEM
- Make adjustments to bring LEM & SEM into alignment.

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Final Actions
<h2>Leader Action – Final Reports</h2> <ul style="list-style-type: none">• Print and prepare all hard copy for signature.<ul style="list-style-type: none">– SEM summary report– For each staff member:<ul style="list-style-type: none">• SEM staff eval report• Job description/competency checklist• Education record• Any other records required by your org• Make copies for your file and for your staff member (if desired)• Send all originals to HR.
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Organizational Benefits

- Saves up to 50% of a leader's time
- Enables objective performance differentiation
- Drives team and organization outcomes
- Focuses on excellence, not mediocrity
- Minimizes rater bias
- Maximizes employee responsibility and participation
- Targets individual development
- Performance conversations drive results

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Thank You!

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