New Approach to Staff Performance Evaluation- A Proof of Concept

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Disclosures: None
Our current staff performance metrics did not align with our organization’s strategic goals.
Background

- Traditional staff performance metrics require that supervisors rate their reports on scales, typically ranging from “exceeds expectations” to “needs improvement”.

This system lacks

| Objectivity on the part of raters | Clearly stated performance standards | Transparency regarding the rationale for ratings |
Purpose

- We designed and implemented a new staff performance measurement system that is well-defined at each level and that clearly states how performance is objectively measured.

### Evaluation Domains by Staff Level

<table>
<thead>
<tr>
<th>Level I</th>
<th>Level II</th>
<th>Level III</th>
<th>All Levels</th>
</tr>
</thead>
</table>
| • Education/Training  
  • Procedure Critiques  
  • Workorders  
  • Policy Violations  
  • Huddle Participation  
  • Kudos given or received  
  • Supply Management  
  • Performance Goals | • QI/PI Project Participation  
  • Daily Checklist  
  • Exam Throughput  
  • Protocol Expertise  
  • Supply Ordering  
  • Mentoring/Teaching | • Technology Superuser  
  • Coaching  
  • Downtime Competency  
  • Inter-modality Relationships  
  • Leads QI/PI Projects  
  • Leads Tier I Huddle  
  • Timely New Staff Orientation  
  • Committee Participation  
  • Succession Planning  
  • Team Productivity  
  • Team TAT | • Care Transformation Model  
  • The Pledge  
  • Service Standards  
  • Teamwork |
<table>
<thead>
<tr>
<th>Score</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>1</td>
<td>Does not put away supplies in a timely manner; does not use 5S to ensure supplies are properly inventoried or stored; Coached with no improvement</td>
</tr>
<tr>
<td>2</td>
<td>Inconsistent with meeting expectations (see #3)</td>
</tr>
<tr>
<td>3</td>
<td>Puts away supplies as received/assigned; actively uses 5S techniques to keep inventory up to date and tidy</td>
</tr>
<tr>
<td>4</td>
<td>3+ Implements new 5S strategies to ensure supplies are managed and stored appropriately; successfully implements department-level cost savings strategies</td>
</tr>
<tr>
<td>5</td>
<td>4+ Sets the standard for supply management; implements successful cost-saving initiatives that impact other areas; innovates new processes that are implemented in other areas</td>
</tr>
<tr>
<td>Average Score</td>
<td>Performance Advantage Rating</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>1-1.5</td>
<td>Does Not Meet Expectations</td>
</tr>
<tr>
<td>1.51-2.5</td>
<td>Needs Improvement</td>
</tr>
<tr>
<td>2.51-3.8</td>
<td>Meets Expectations</td>
</tr>
<tr>
<td>3.81-4.8</td>
<td>Exceeds Expectations</td>
</tr>
<tr>
<td>4.81-5</td>
<td>Commendable</td>
</tr>
</tbody>
</table>
Methods

- **Context and Intervention:** The new performance evaluation system was piloted throughout 2022 at one of our Healthcare System sites ("test site"). Staff are evaluated on a number of metrics reflecting various experience levels (Figure 1).

- **Study of the Intervention:** We compared retention rates and distribution of performance categories between the test site and another site ("comparison site") from 2020 through 2022.

- **Measures/Metrics:** Retention rates, Percent of performance ratings in the categories: (1) Needs improvement, (2) Meets expectations, (3) Does NOT meet expectations, (4) Exceeds expectations, (5) Commendable.

- **Analysis:** We used retention rates and simple descriptive statistics
Results

- Implementation year at the test site (“SJH”) was January 2022.
- Retention rates: After a significant decrease in staff retention in 2020 and 2021, the test site (“SJH”) almost completely recovered to pre-pandemic retention rates in 2022.
- The comparison site (“EUH”) experienced only a minimal decrease in the retention rate in 2021, but a dramatic drop in 2022.

<table>
<thead>
<tr>
<th>EUH Year-end retention rates:</th>
<th>SJH Year-end retention rates:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2020</strong>- 88.46%</td>
<td><strong>2020</strong>- 96%</td>
</tr>
<tr>
<td><strong>2021</strong>- 87.5%</td>
<td><strong>2021</strong>- 72.55%</td>
</tr>
<tr>
<td><strong>2022</strong>- 65%</td>
<td><strong>2022</strong>- 91.67%</td>
</tr>
</tbody>
</table>
Results

- Performance categories in 2022: At the test site (“SJH”) a performance category of “commendable” was met by almost 10% of staff. The comparison site (“EUH”) did not have this category in 2022.
- Staff at the test site met the criteria for “exceeds expectations” in almost 35%, while this category was met by only 21% of staff at the comparison site.
- The “needs improvement” category applied to 4% at the test site versus 11% at the comparison site.

FY= Fiscal Year
Conclusion

- We successfully piloted a new performance evaluation system at one of our radiology service sites.
- Our data raise the possibility that the new performance evaluation process may effect higher retention and serve as a driver for better employee performance.

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