# Lexington-Fayette County Health Department

## Quality Improvement Story Board

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## PLAN

### Getting Started

The Human Resources office has a strategic objective to implement a comprehensive employee performance management system. One strategy to accomplish this objective is to implement an effective performance evaluation tool.

### Problem Statement

The current LFCHD performance evaluation tool is generic and used for all positions with no specificity for the job held or level of position; therefore the tool is not effective at managing performance to job standards.

### Aim Statement

Develop performance standards to define job performance expectations and implement an automated performance evaluation system that includes multi-rater feedback, performance reporting and goal tracking.

### Process Outline & Relevant Data

The project process outline included the following steps:

- Research and gather information regarding available automated performance evaluation systems and product features
- Finalization of job standards for all health department staff
- Assemble a multi-discipline team to review performance evaluation products/demonstrations
- Evaluate and score products/vendors based on product features and pricing
- Select performance evaluation product/vendor
- Develop an implementation plan, communication and training plan for staff

Relevant data includes: Job descriptions and job standards, on-line reviews of performance evaluation systems, performance evaluation products features, review team scores, performance evaluation products pricing.

## Identify Potential Causes

Potential causes leading to the problem include: 1) lack of job-specific performance standards and 2) lack of resources to implement a new performance evaluation system and 3) lack of a customized performance evaluation tool.

## Identify Potential Solutions

Job-specific performance standards developed for each position; implementation of performance evaluation system with the following features and capabilities: customizable to incorporate specific job standards as performance factors, multi-rater feedback ability to allow for 360 degree performance reviews for supervisory staff, performance rating & administrative reporting, performance goals tracking with ability to log progress notes.

## Improvement Theory

This project should improve the performance management process by defining job expectations and comparing performance to the expectations; streamlining the administrative process of monitoring, tracking, documenting and guiding individual performance.

## DO

### Test the Theory

A scoring tool was developed to evaluate the features of four products that were priced within budget and had the desired features and capabilities. The review team participated in product demonstrations via webinar, and evaluated and scored each product on how it met the desired features. The scoring tool rated product features from 1 (unsatisfactory) to 4(excellent) on each of the following capabilities:

- 360 feedback – allows anonymous/confidential input; scoring capability, ease of use
- Employee Self Evaluation – offers on-line self evaluation, ease of use
- Customizable Content – ability to customize performance factors per job, allows comments for each performance factor, ease of use
- Scores and Weights – flexible rating scale, auto calculates overall score, ease of use
- Progress Notes – allows supervisors and employee to log notes throughout the year, provides suggested phraseology based on competencies, ease of use
- Goals Management – ability to monitor and note progress, ease of use
- Reporting Capability – ability to run aggregate reports, ability to run individual reports, ease of use

## CHECK

### Study the Results

The review team participated in 4 product demonstrations, and ruled out 2 products based on low reporting capabilities and confusing screen displays. The final 2 products were scored:

|  | Product 1 | Product 2 |
|---|---|---|
| 360 Feedback | 20.5 | 22 |
| Employee Self Eval | 23 | 21 |
| Customizable | 25 | 23 |
| Scores/Weights | 22.5 | 21.5 |
| Progress Notes | 26 | 25 |
| Goals Management | 21.5 | 20 |
| Reporting | 26 | 19.5 |
| TOTAL | 164.5 | 152 |

## ACT

### Standardize or Develop New Theory

Based on the scores of the top 2 products, the team selected Product 1 as the performance evaluation system.

The Product 1 vendor was provided a sample LFCHD job with accompanying job standards. Vendor developed a template that allows customizable performance factors (job standards) for each job. The template will be used as the prototype for all job evaluation templates. Each LFCHD job has corresponding job standards, which will be loaded into the template and then used to evaluate individual performance in comparison to the standards.

### Future Plans

- Implementation timeline will be finalized by October 4, 2013
- Communication and training plan will be finalized by October 31, 2013
  - Supervisory staff will be trained first
  - Non-supervisory staff will be trained immediately following supervisory training
- The new evaluation tool will be used for annual performance evaluations conducted in March/April 2014
- Following the March/April 2014 performance evaluations, reports will be produced to identify trends in performance ratings
- Performance trends will be analyzed yearly