

Leadership Performance Planning & Evaluation

STEP 1: Start With Job Description

What is done

Title: Supervisor

- Hire, train, coach, evaluate, discipline clinic operations staff.
- Supervise daily activities of staff, assigning work, reviewing outcomes and ensuring clinic protocols are being followed.
- Establish and monitor an annual budget to cover salaries, supplies, materials and related clinic expenses.
- Evaluate the clinical operations work processes, determine areas for improvement and recommend operational changes.



STEP 2: Build Performance Plan (Key Areas of Responsibility (KAR) and Goals)

What is done and How it is done

KAR: Supervision

Competency = Fosters & Promotes Teamwork

Hire, train, coach, evaluate, discipline clinic operations staff. Supervise daily activities of staff, assigning work, reviewing outcomes and ensuring clinic protocols are being followed.

Goals

1. Hire and select team members based on the best combination of skills, job and organizational fit, ensuring diversity within 30 days of posting.
2. Provide team members with written, current job descriptions upon hire or change in duties. Provide timely and useful performance and behavior feedback regularly.
3. Orient all team members to a common vision and collective goals, using team and department meetings and other relevant communication vehicles.
4. Go to the worksite to observe work process firsthand on a daily basis. Engage team members to identify problems and use root cause analysis to find solutions.

KAR: Budget and Finance

Competency = Achieves Results

Establish and monitor an annual budget to cover salaries, supplies, materials and related clinic expenses.

Goals

1. Establish clinical supply and materials budget by June 1 for the following fiscal year.
2. Monitor expenditures to maximize use of resources and minimize waste.

KAR: Operations

Competency = Solves Problems

Evaluate the clinical operations work processes, determine areas for improvement and recommend operational changes.

Goals

1. Identify the correct risks, issues and opportunities within the clinical workflow. Establish key performance indicators for the clinic and provide a weekly update of progress to the team.
2. Organize teams to identify gaps in operational performance, empowering them to analyze causes and recommend solutions.



STEP 3: Conduct Review and Evaluation

What is done, How it is done and Results

KAR: Supervision

Competency = Fosters & Promotes Teamwork

Goals

1. Hire and select team members based on best combination of skills, job and organizational fit, ensuring diversity. Provide team members with written, current job descriptions. Provide timely and useful performance and behavior feedback. Orient all team members to a common vision and collective goals.

Solid Performance

Comments: A has hired an excellent team in the clinic. All staff know their job and all work together as a team with harmony.

Go to the worksite to observe work process firsthand on a daily basis. Work with staff to identify problems. Use root cause analysis to find solutions. Engage team members in problem analysis and solutions. [Competency = Solves Problems]

Exemplary

Comment: Supervisor has sent all team members to lean techniques training and they use the root cause analysis tools very effectively.

KAR: Budget and Finance

1. Establish clinical supply and materials budget by June 1 for the following fiscal year.

[Competency = Achieves Results]

Solid

Comments: The budget was established in May of the preceding year and reflected the correct amount of supplies and materials needed to accomplish the work.

2. Monitor expenditures to maximize use of resources and minimize waste. [Competency = Achieves Results]

Exemplary

Comments: By the end of the fiscal year, the inventory was used appropriately and there were no leftovers.

KAR: Operations

1. Identify the correct risks, issues and opportunities within the clinical workflow. Establish key performance indicators for the clinic and provide a weekly update of progress to the team. [Competency = Achieves Results]

Approaching

Comments: Supervisor conducted a needs assessment of the patients in the clinic and determined that a major concern of 36% of the patients was getting Starbucks coffee. Supervisor was able to get a coffee machine in the waiting room that dispensed Starbucks. While some of the patients are happier, many others continue to have concerns.

2. Organize teams to identify gaps in operational performance, empowering them to analyze causes and recommend solutions. [Competency = Fosters & Promotes Teamwork]

Solid

Comments: Supervisor has several problem solving teams that are constantly seeking improvements in their processes. Several areas of waste have been identified and eliminated during the year.

Summary of Past Year's Performance:

Supervisor did an excellent job at hiring the right people for the clinic, training them and ensuring that roles were clear. The team members appreciate Supervisor's attention to their concerns. The patient satisfaction scores for the clinic are good but can be better.



STEP 4: Create a Development Plan

Using Leadership Competencies

- Targeting Strengths and a Gap
 - Up to 3 strengths and 1 gap
 - Enhance current performance
 - Prepare for future assignment
- Identify a Goal for each
 - What outcome are you looking for?
- Action Steps/Plan
 - What do you need to do to accomplish your goal, including resources and support.
- Timeframe
 - When will you complete your steps and your Plan?
- Expected Results
 - What will success look like?

Example: Strength – Creates Value for Those We Serve

Strength: Creates Value for Those We Serve	Action Steps/Plans:	Timeframe
Goal: Increase my knowledge and understanding of what frustrates my patients the most when they have clinic visits.	<ol style="list-style-type: none">1. Research data gathering methodologies which are appropriate.2. Analyze the data.3. Implement the most relevant tool that will gain the best information.4. Establish a feedback system to verify with patients that the data accurately reflects their needs.	By end of Q1 Within 60 days Within 60 days Within 2 weeks March 1 Complete
Expected Results: I will know what the “pain points” are for my patients coming to the clinic and will have the ability to initiate problem solving to reduce some of their concerns and better meet their needs. My patients will be happier when they arrive and will be able to better communicate about their medical problems when not so concerned about other issues.		