CHALLENGES

- Job descriptions in multiple systems
- Employee goals tracked in different databases
- Paper-based employee evaluations
- Struggled to align employee performance with goals
- Satisfy requirements of the Malcom Baldrige Award

RESULTS

- System that's easy to use and designed for healthcare
- Significant time savings for HR
- Ability to track goals and feedback
- All employees sign off on job descriptions and have aligned goals
- Higher completion rate for performance appraisals
- Helpful reporting capabilities
- HRIS intergration with Lawson

UNION
HOSPITAL

Union Hospital Streamlines Processes and Better Aligns Employee Performance with Organizational Goals Using Performance Manager

Delivering the best healthcare starts with employees, which is why so many organizations are committed to developing the best healthcare talent. This requires a tight grasp on employee performance and alignment with organizational goals.

Union Hospital, Inc. in Indiana is one such organization. The hospital's HR department wanted to streamline routine HR-related activities and satisfy requirements of the Malcolm Baldrige National Quality award. To accomplish its goals, it knew it needed to more systematically manage staff development and performance.

Determined to Join the Electronic Age

At the time, the hospital's job descriptions were created in multiple systems and stored in physical binders. To complicate matters, employee and departmental goals were tracked in different databases at the department level — based on spreadsheets filled out by managers. These were paired with paper-based employee evaluations that were easy to misplace and time-consuming to capture in electronic systems. Someone in HR had to enter this data separately into the HRIS system and reporting was a challenge. Moreover, Union Hospital struggled to understand how well managers and employees were working towards organizational goals. When deadlines were missed or evaluations were lost, HR often shouldered the blame. "Moving our department to the next level was the major catalyst for addressing these issues", explains Joanne Davignon, director of HR and staff development for Union Hospital.

Seeking a Solution Designed for Healthcare

Union Hospital's vice president of HR spearheaded the search for a solution. According to Davignon, the focus was on a solution that helped track job performance and view trends, as well as supported development and feedback on job descriptions. As the hospital conducted its due diligence, it zeroed in on HealthcareSource Performance Manager®. "Other solutions fell short for a number of reasons, including the fact that they weren't designed for a healthcare organization", continues Davignon.

The HR group liked that Performance Manager made it possible to track goals and feedback centrally, ensure job descriptions are consistent organization-wide, and allowed employees to fill out self-evaluations online and sign-off on job descriptions. It also appreciated that it enabled the hospital to generate reports on evaluations and track a history of job descriptions. "Because Performance Manager was customized to fit the needs of healthcare, it's easy to tailor. Plus, it's very easy for our employees to use", says Edith Okoth, HR manager for Union Hospital.

Seeing Rapid Adoption and Benefits

With full support from the executive team, the HR team used the implementation of Performance Manager as an opportunity to make major changes to its job descriptions. It then conducted an extended pilot with a group of close to 500 users, representing nearly 20% of its workforce.

According to Okoth, the Information Systems (IS) group was one of the first participants in the pilot. Once colleagues heard how much the IS team liked the solution, they wanted to participate as well. The HR team added employees from non-clinical areas, such as housekeeping, to the pilot, as well as a large number of staff nurses. "The implementation was a very positive experience. Our contacts at HealthcareSource were incredibly responsive and helpful as we developed our template. We also leveraged examples provided by HealthcareSource to ensure we were following best practices", continues Okoth. The hospital built its goals right into the template so managers simply click a radio button that ties back to the organization's critical success factors.

Performance Manager is integrated with the hospital's Lawson HRIS system for a seamless exchange of information. Every night, new information from the HRIS system is automatically fed into Performance Manager. This eliminates the need to manually enter data into Performance Manager. As a bonus, the integration has enabled Union Hospital to streamline its HRIS system. "If there are issues with the data in our HRIS system — such as a wrong email address or title — we discover it via Performance Manager", explains Okoth.

Enhancing Accountability and Communications

Since going live with Performance Manager, Union Hospital has realized a number of improvements. Automating performance appraisals has improved accountability for both managers and employees, with everyone clear on expectations. "Now employees know from their first day what it takes for them to succeed", says Davignon. Goals are now linked to performance evaluations so employees better understand how their performance aligns with the hospital's critical success factors. In addition, managers and the HR group can better track how well employees are working toward their goals.

While Performance Manager doesn't replace the communication between staff and managers, it helps ensure consistent, enhanced interactions.The self-appraisal gives employees an opportunity to share their perspectives and managers to digest them before the sit-down conversations. Plus, employees appreciate being able to review past evaluations and job descriptions via their personalized Performance Manager portals. "This helps our employees see how much they've advanced over time", says Davignon.

Simplifying Processes and Saving Time

With Performance Manager in place, the HR group is also able to improve and streamline processes. By automating performance reviews and evaluations, HR no longer needs to be involved reminding managers and employees about upcoming reviews, and entering data once the reviews are complete. Performance Manager automatically sends an email to employees and managers, and alerts them when they're nearing the deadline date. Plus, if more than one department or employee is working on the same goals, everyone can learn from one another and avoid duplicating efforts.

The HR department also developed a department orientation that is automatically assigned within the first three days of a person being in a new position. It uses the integration between its HRIS system and Performance Manager to automatically assign the department orientation appraisal whenever there's a change in someone's employment status, such as transferring from one department to another. "We don't have to do anything to make this happen, and because both the employee and manager have to sign off on this appraisal, we can ensure accountability and track trends over time. At the same time, all the alerts and reminders help ensure we meet all regulatory deadlines, such as those associated with reporting on our metrics", says Davignon.

"Our managers love the time they save. And we in HR love the fact that we aren't spending our time on clerical work", explains Okoth. In fact, the hospital previously dedicated one full-time employee to scanning and keying in data from performance evaluations and reviews into the HRIS system. "Our evaluations were several pages long and there was always a big rush at the end of each month to enter them into the system because many managers waited until the last minute to fill them out. With Performance Manager, it's very clear where things stand so there is no more finger pointing", continues Okoth.

Taking Advantage of Reporting and Competency Checklists

The HR team finds a number of standard reports useful, including ones that show overdue tasks, how well the hospital is working toward its goals, and a daily feed report that indicates the files entered into Performance Manager from the HRIS system. It has also built several custom reports, such as one that focuses on a single item in an appraisal, for example, how many employees are ready to attend a leadership development program. At the same time, the built-in competency checklist also benefits HR. "In the past, it was a nightmare to provide these when HFAP or Board of Health came onsite. Now we can quickly and easily generate these", concludes Davignon.

ABOUT UNION HOSPITAL

Location: Terre Haute, IN

Overview: Founded in 1892, Union Hospital, Inc. is part of a not-for-profit healthcare system serving residents of west central Indiana and eastern Illinois. Its facilities include two hospitals, 89 primary care physicians and seven hospitalists. In 2013, Union Hospital, Inc. was named one of the Best Places to Work in Indiana in 2013 for the fifth consecutive year.

Employees: 2,400

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