Engaging Staff in the Annual Competency Process

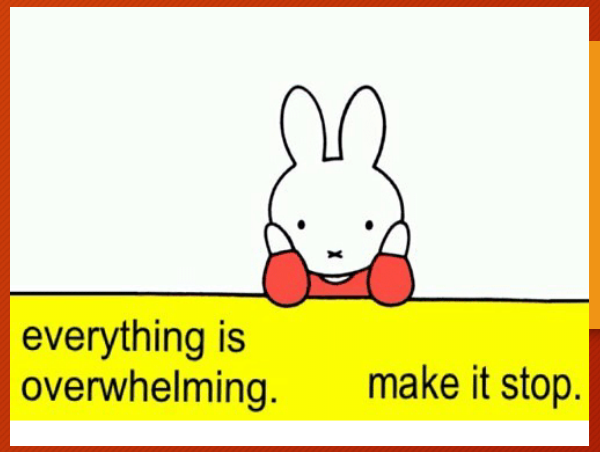
Gen Guanci MEd, RN-BC, CCRN-K
Consultant
Creative Healthcare Management

Objectives

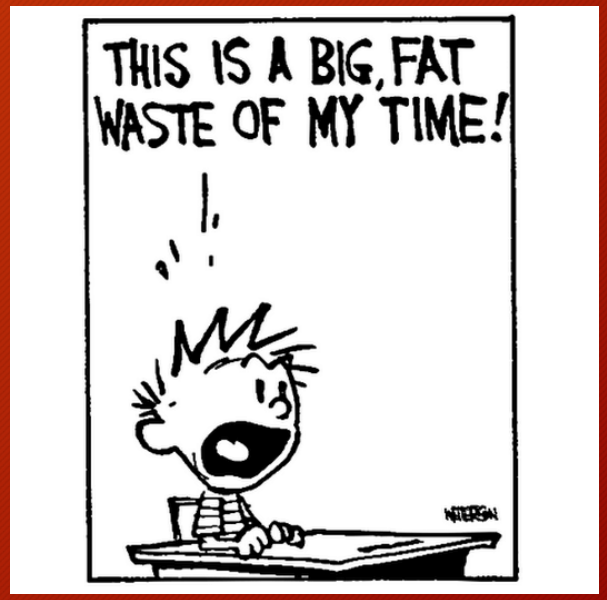
At the completion of this session you will be able to:

- Identify at least 4 methods for competency validation.
- Use a structured process for identification of annual competency.
- Outline strategies to foster staff ownership in individual competency validation.

What does your thoughts on your current competency process?


everything is overwhelming.
make it stop.

HELP!


THIS IS A BIG, FAT WASTE OF MY TIME!

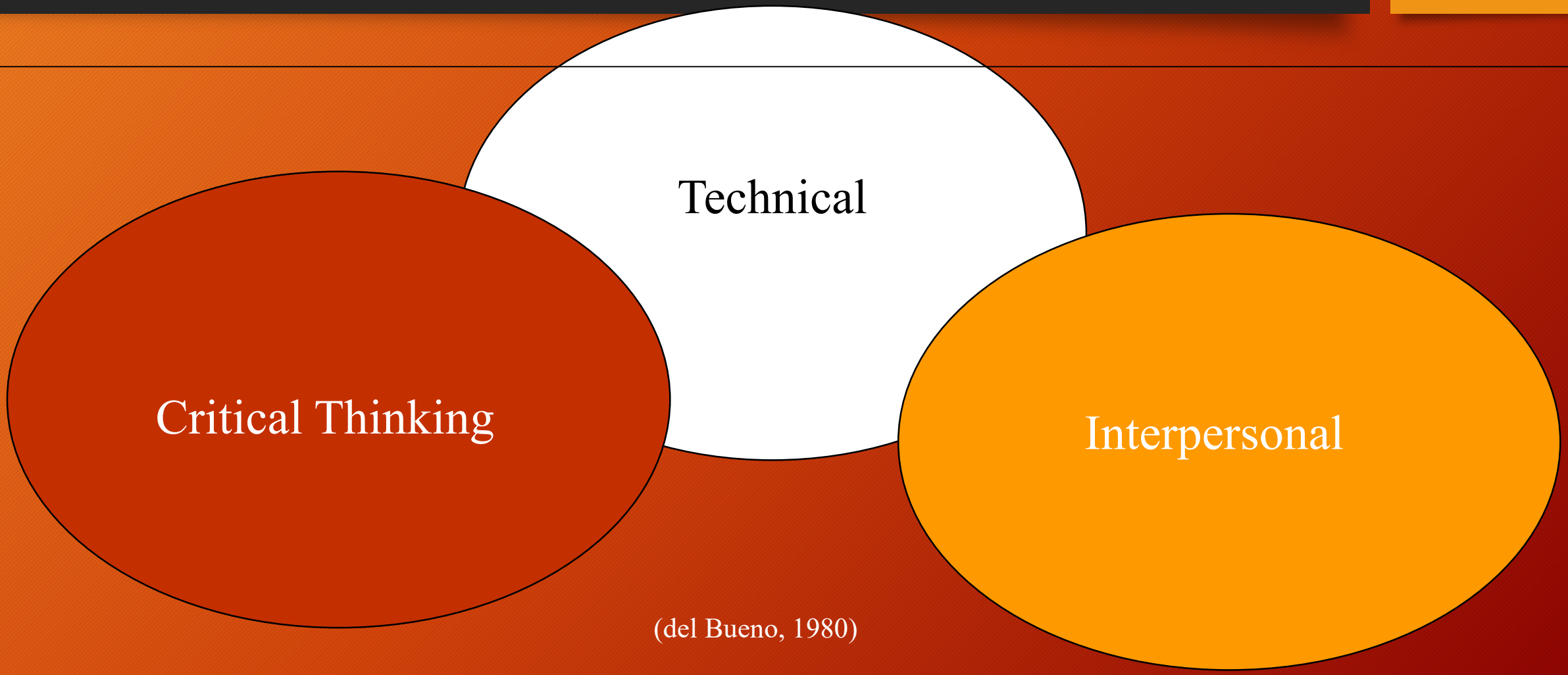
What does your current competency process look like?

- Annual Skills or Competency Fair/Day
- Assignment of LMS modules
- Completion of tests
- Driven by others outside the discipline
- Little variation year to year

Challenges with Competency Programs

- Used to educate versus validate
- Often based upon ritual or habit
- Data does not drive process
- Based upon interpretation of standards
- Often only address technical skill

Assessing All Domains of Skill



(del Bueno, 1980)

Biggest Myths…

Regulatory bodies dictate frequency and methodology

Read the primary source!

Regulatory Standards

Topic	Standard	Requirement	When Required	Personnel
Restraint and Seclusion	JCPC.03.03.07PC.03.05.17	Recognizing behavior, interventions to minimize use, safe application, physical holding and take-down techniques, monitoring, evaluation, first aid and CPR	Orientation and ongoing	Staff who monitor patients or apply R&S. Physicians who order R&S also must be trained on R&S

Topic	Standard	Requirement	When Required	Personnel
End of life	JCPC.02.02.13	Unique needs of dying patients and their families	Ongoing	Patient Care Services

Wright's Competency Assessment Model

Elements of success

Competencies collaboratively identified

Reflective of the dynamic nature of work

Ownership

+

Employee-centered verification

Verification method choices are identified and appropriately match the competency categories

Empowerment

+

Leaders create a culture of success

Focused on the organizational mission & on supporting the employee

Accountability

Competencies collaboratively identified

Shared Governance

1 methodology to foster staff collaboration

AND

ownership in the competency process

Shared Governance

A leadership model in which positional leaders partner with staff in decision making processes while creating ownership for improvement in practice.

(Guanci & Medeiros, 2019)

Competency Selection Process

Step 1

Brainstorm staff needs in 4 categories with shared governance group

- What are the ***NEW*** procedures, policies, equipment, initiatives, etc. that affect this job class?

- What are the ***CHANGES*** in procedures, policies, equipment, initiative, etc. that affect this job class.

- What are the ***HIGH RISK*** aspects of this job.
  - Anything that would cause
    - harm
    - death
    - legal action

- What are ***PROBLEMATIC*** aspects of this job.
  - identified through quality data
  - incident reports
  - patient surveys
  - staff surveys
  - other forms of evaluation

Worksheet for Identifying Ongoing Competencies

*Job Class*_____

*Dept./Area*_____*Date*_____

Step 1: Brainstorm staff needs in each of the categories listed below.

Step 2: Prioritize those needs and choose which ones the organization will focus on.

Competency Needs:
What are the **NEW** procedures, policies, equipment, initiatives, etc. that affect this job class
What are the **CHANGES** in procedures, policies, equipment, initiative, etc. that affect this job class.

What are the **HIGH RISK** aspects of this job. High risk is anything that would cause **harm, death,** or **legal action** to an individual or the organization

What are **PROBLEMATIC** aspects of this job. These can be identified through quality management data, incident reports, patient surveys, staff surveys, and any other form of evaluation (formal or informal)

Reminder: *Are there any age-specific aspects in any of the priority areas listed above? Add age specific aspects to a competency selected above rather than creating a separate age specific competency.*

Try to limit your focus to no more than 10 competencies each year.
Trying to focus on more than that can be confusing and overwhelming for both staff and leaders.

Step 2.

Prioritize those needs and choose which ones the organization will focus on

Ways to prioritize:

- Does the item fall under more than one category?
- What is the outcome for your customer
- For High Risk specifically
  - Is the item time sensitive?
- What is the data telling you?

Worksheet for Identifying Ongoing Competencies

*Job Class*_____

*Dept./Area*_____*Date*_____

Step 1: Brainstorm staff needs in each of the categories listed below.

Step 2: Prioritize those needs and choose which ones the organization will focus on.

Competency Needs:	*Priority: Hi-Med-Lo*
What are the **NEW** procedures, policies, equipment, initiatives, etc. that affect this job class	
What are the **CHANGES** in procedures, policies, equipment, initiative, etc. that affect this job class.	

What are the **HIGH RISK** aspects of this job. High risk is anything that would cause **harm, death,** or **legal action** to an individual or the organization	
What are **PROBLEMATIC** aspects of this job. These can be identified through quality management data, incident reports, patient surveys, staff surveys, and any other form of evaluation (formal or informal)	

Reminder: *Are there any age-specific aspects in any of the priority areas listed above? Add age specific aspects to a competency selected above rather than creating a separate age specific competency.*

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Employee-centered verification

Methods of Competency Verification

Wright, D. The Ultimate Guide to Competency Assessment in Healthcare. 3rd Edition.

Tests/Exams

- Measures cognitive knowledge
- Not good for measuring “actions in the real world.”
- Usually only match about 5% of the ongoing competencies identified

Return Demos

- Great for measuring technical skills
- Checklists fall under this category
- Checklist is not a requirement for this, you do need objective measurements identified

Observation of the work
(Evidence-based work)

- Not watching the person do the work, but looking at the finish product
- Evidence-based work
- Most under-captured competency verification.
  - It is available every day…. We just need to capture it.

Case Studies

- Great for critical thinking
- Situation presented with questions to follow
- Can be clinical or non-clinical in nature

Exemplars

- Written or spoken story about a situation.
- Good for critical thinking skills and some interpersonal skills
- Reflective practice

Peer Reviews

- Great for interpersonal skills
- Almost everyone has had one negative experience with peer review – proceed with caution.
- Create a peer review that is safe for reviewer, receiver, and facilitator.

Self Assessment

- Limited use
- Good for competencies that reflect values and beliefs

Discussion groups

- Measures critical thinking
  - Can also help develop critical thinking skills
- Does take some time and effort, but worth it
- Need a strong facilitator
  - Group evaluates self
  - Facilitator may veto decision

Mock Events

- Great for measuring action in the real world
- Includes:
  - mock codes
  - mock disasters
  - mock chemical spills
  - mock surveys
  - mock financial audits.

Presentations

- Most commonly used competency verification by physicians
  - grand rounds
  - case reviews
  - other

Quality Improvement Monitors

- Data speaks to competency or not
- If a QI monitor can reflect one individual's performance
  - automatic competency verification
- Existing QI monitors may need tweaking
  - reflects the identified individual

Leaders create a culture of success

ACCOUNTABILITY AT EVERY LEVEL IS CRITICAL, AND LEADERSHIP BEGINS AT THE TOP.

Mary Landrieu

Accountability

- The # 1 competency deficit in the world!

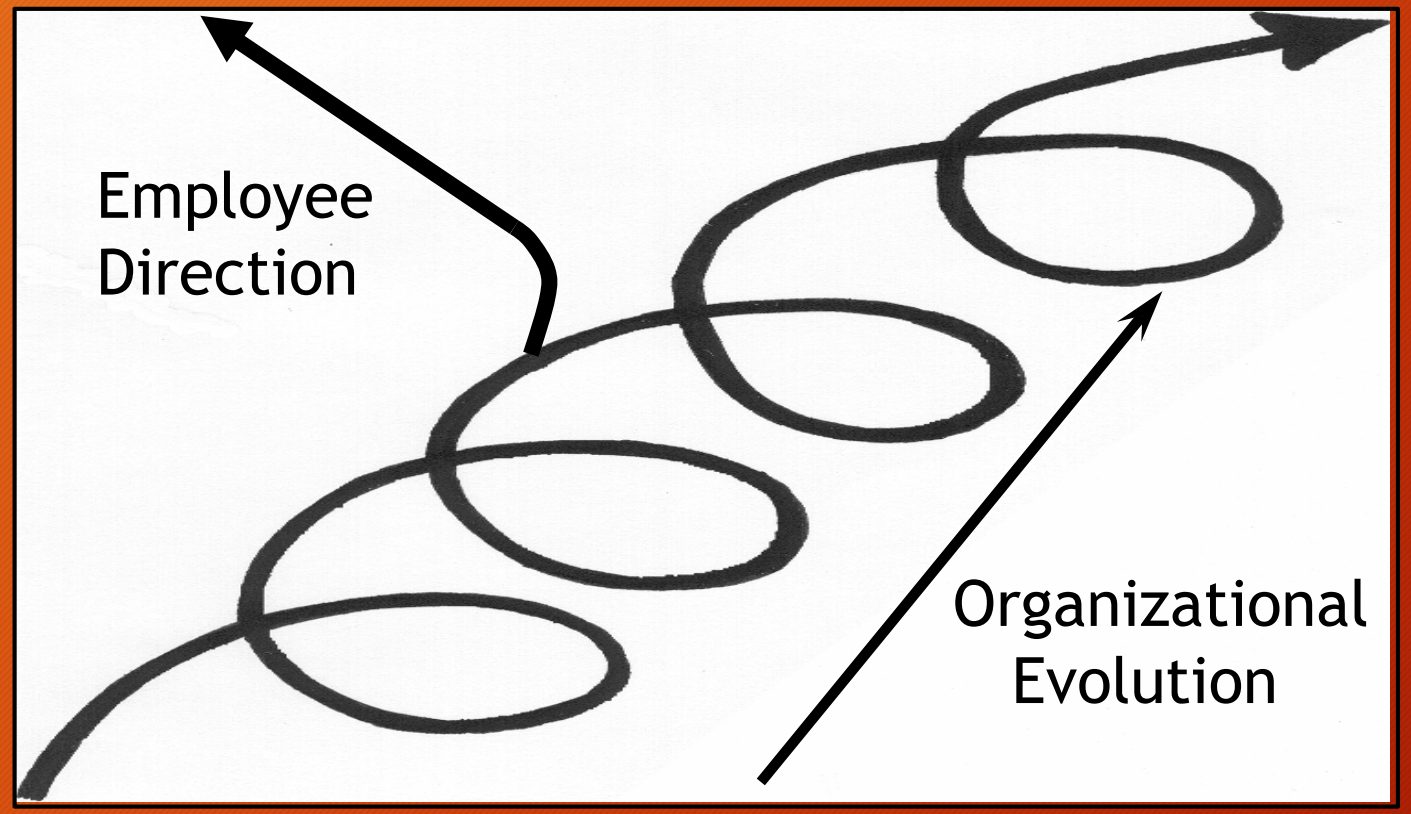
Accountability

Manager and employees develop competencies for the job class

Each employee is accountable to verify their identified competencies

The manager is accountable for creating an environment that supports competency achievement

Competency Issues verses Other Employee Issues



Engaging Staff

Use	Develop	Complete	Share	Develop
Use your shared governance structure (if applicable)	Develop a focused task force inclusive of those in the full spectrum of clinical roles	Complete worksheet for competency selection	Share supportive data	Develop communication pan.

Competency Cycle

Top Priorities

Assessed by Competency Assessment

Other important Aspects of work

Assessed by Quality Improvement Activities

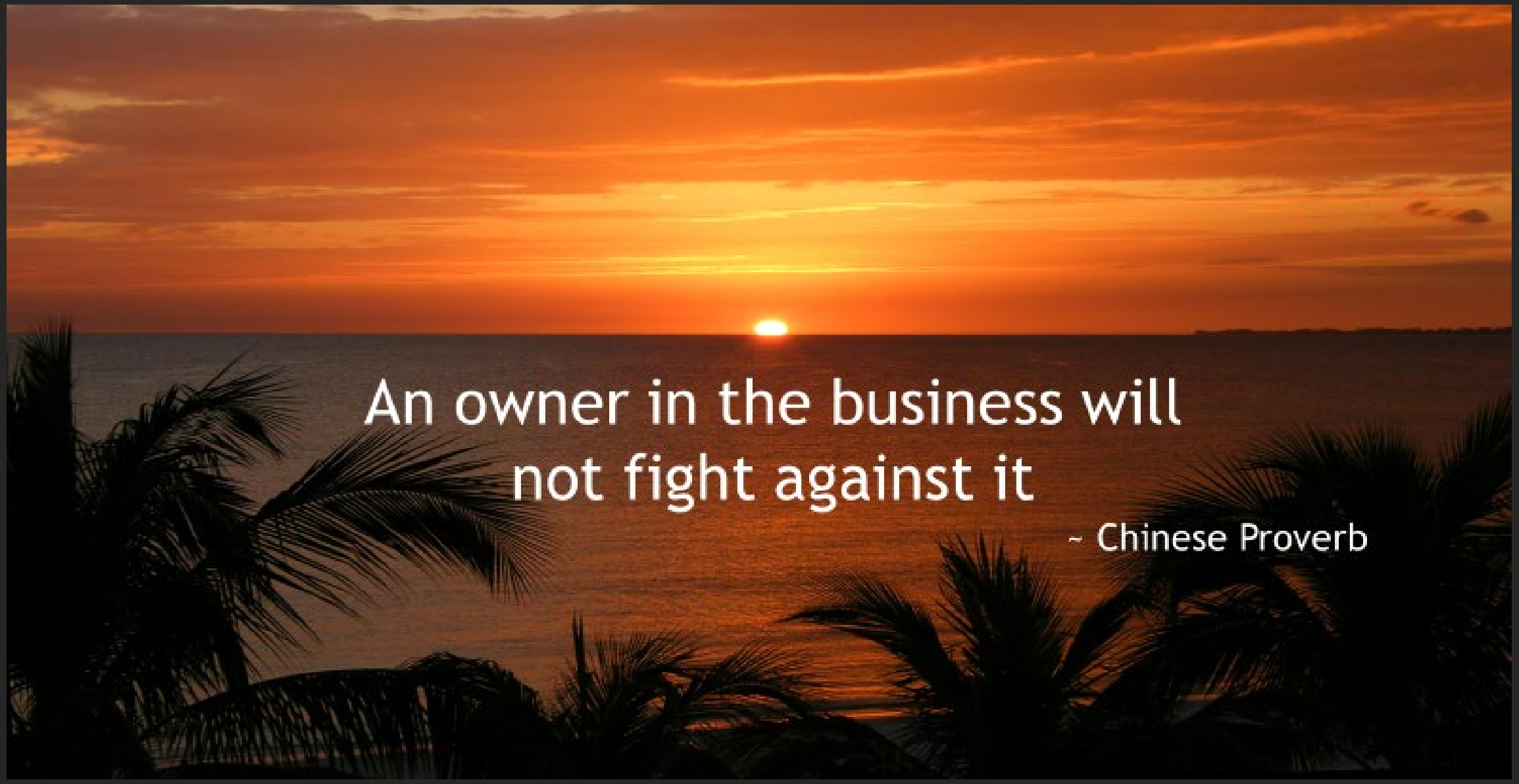
Competency Options Example

Competency statement

Demonstrates the ability to apply customer service principles to everyday work situations.

Verification Methods

- Submit 2 customer services peer reviews completed by 2 different coworkers.
- Submit 1 customer service exemplar based on information from a patient/family member. May include cards, letters, or patient satisfaction information that identifies you by name.
- Participate in a case study/discussion group session on customer service.
- Complete two customer service case studies.


An owner in the business will
not fight against it
~ Chinese Proverb

References

- Guanci, G., Medeiros, M., (2018) *Shared Governance That Works*. Minneapolis, MN.

- Wright, D. (2005). *The Ultimate Guide to Competency Assessment in Healthcare*. 3rd Edition. Minneapolis, MN:

After today…

Gen Guanci
gguanci@chcm.com
239.949.4227
chcm.com