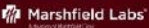


Student Evaluation – Transitioning from a Didactic to Performance Based Model

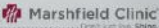
Julie J. Seehafer, PhD, MLS(ASCP)^{CMSH}
Director, Laboratory Education
Marshfield Labs – A division of Marshfield Clinic
Marshfield, Wisconsin

BEYOND numbers

 Marshfield Labs
A DIVISION OF MARSHFIELD CLINIC


Session Goal

Using a case study approach,
discuss the challenges
felt by staff
of transitioning from an evaluation model
emphasizing *didactics* to one with
equal emphasis on *performance*.

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Learner Objectives

- List advantages of incorporating a performance based evaluation model for students.
- Compare the logistics needed for didactic based vs performance based evaluation.
- Evaluate students (and/or employees) using a performance based system.

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Case Study

Background

- the lab; the students; the “old” evaluation


Methods

- discussions with staff; gap analysis

Materials


- the “new” evaluation tool

Conclusions

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Case Study

~~ Background ~~

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Marshfield Labs, A Division of Marshfield Clinic



Laird Center
for Medical
Research

 Marshfield Clinic
A DIVISION OF MARSHFIELD CLINIC

Marshfield Clinic Health System – Marshfield Campus



Marshfield Clinic Health System

Founded in 1916 by six physicians.
 Today, a system of care:
 >700 physicians
 >80 medical specialties & subspecialties
 >6,500 employees
 >50 locations across central, northern and western Wisconsin
 >350,000 unique patients served each year



Marshfield Labs

~2000 samples received every day
 >2 million tests performed every year
 >250 people employed across system
 serves pts/clients in clinic, hosp, nation
 has separate service lines for

- reference testing - clinical & anatomic procedures
- veterinary medicine
- forensic toxicology / workplace drug testing



Marshfield Labs - Student Programs

Medical Lab Science	1947
Histotechnician	1951
Medical Lab Technician	1975
Phlebotomy	1982
Clinical Microbiology (grad)	1999
Specialist in Blood Banking (grad)	2010
Microbiology Categorical	2013

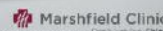


Evaluation – What We *Had Been* Doing

Didactics (knowledge & skills)

- Written tests, unknowns, worksheets, checklists
- Administered
- Part of the “grade”

Consequences:
 → On the transcript



Evaluation – What We *Had Been* Doing

Soft Skills (attitudes)

- Performance evaluation
- Administered
- NOT part of the “grade”



Consequences:

- none

Is That Part of the Grade?



YES !



NO !

Now It's Part of the Grade !

Goal of the Student Programs

→ Graduates should:

1. Be good entry-level techs
2. Be good co-workers

So....

- Administer evaluations for both
- Incorporate both into the grade

Case Study

~~ Methods ~~

Discussions with Lab Staff

Anecdotally, staff/faculty wanted a change, but were hesitant.

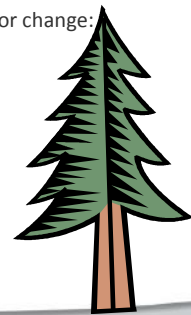
- Did want to differentiate among students.
- Did not want to be “the bad guy”.
- Did not want to make it about “personality”.
- Did want to be objective, honest, consistent.

Discussions with Lab Staff

Formally, discussed the need for change:

- Why change?
- What *is* evaluation?

→ Plant the Seed



Discussions with Lab Staff

Why Change?

~~ Consequences ~~

Consequences

People who teach in the health care profession have a responsibility to:

- The student
- Themselves and their program
- Potential employers
- Ultimately, patients and the public

Discussions with Lab Staff

What *is* evaluation?

A **measure...**
against a **standard...**
to assess **value.**

From: University of Wisconsin School of Education

Evals: Cognitive & Psycho-motor

Cognitive

- Written Test...
against a Key...
To assign a grade – A,B,C; Pass/Fail

Psycho Motor

- A Practical with Unknowns...
against Known Results...
to assess Bench Skills –
100% accuracy needed for pt results

Value

The “value” assessed may vary with the situation:


Measure	Standard	Value
Written Exam	Correct Answers 100%	83% = “B”
Timecard Entries	Always Clocks 100%	83% = Needs Improvement
Safety Practices	Follows All Safety Rules 100%	83% = Unacceptable

Evals – Affective Domain

- Need a measure
--the Performance Appraisal
- Need to decide on a standard
--what is standard/ideal
- Need to decide on value
--that translates to an academic grade


Gap Analysis

What type of Performance Evaluation should we be using?




Close the gap with a revised evaluation.

What type of Performance Evaluation do we use now?



Types of Evaluations We Were Using


- The “Everyone’s a ‘4’ Eval”
- The “Nobody Wants to be a Bad Guy Eval”
- The “Let’s Just Average It Eval”



Averaging / Composites

Student		December Eval		April Eval		July Eval	
		Range of scores from instructors	Scores students see (averaged)	Range of scores from instructors	Scores students see (averaged)	Range of scores from instructors	Scores students see (averaged)
A	BJ	2-5	3.5-4.1	3.5-5	3.8-4.3	3.5-5	4.0-4.5
B	MK	3-5	3.2-4.0	3-5	3.7-4.1	3.3-5	4.0-4.4
C	JL	3-4.5	3.4-4.1	3-5	3.9-4.3	3-5	4.1-4.6
D	MW	1-5	2.5-3.7	2-5	3.5-4.0	2-5	3.7-4.2


- This example: Students evaluated by four-five instructors on 11 items.
- When students see “average”, they do not see range of impressions they have on instructors (future coworkers).
- Opportunity is lost to discuss unsatisfactory (1s) or exceptional (5s) performance.
- > Evaluation is softened.



Case Study


~~Materials~~

The “New” Evaluation Tool



Remember the Definition of Evaluation


A **measure**...
 against a **standard**...
 to assess **value**.



“Standards” are Key

Define expectations in standards.
 Use same standards throughout year –
 be consistent!

Provide opportunities for student to show
 improvement toward meeting standards
 throughout year.



From "Student Programs Policy and Procedure Guide"

2. Professionalism and Work Ethic
(during the student program)

Students are expected to have a professional and ethical work attitude and to demonstrate this through the following activities:

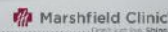
1. Maintaining regular attendance in the classroom and in the lab.
2. Asking for additional activities when assigned activities have been completed.
3. Asking for help or further clarification when needed.
4. Communicating in a positive and effective manner.
5. Accepting and complying with all policies and procedures.
6. Accepting responsibility for individual work.
7. Accepting constructive criticism and using it for self-improvement.
8. Maintaining a neat, clean, and fully stocked work area.
9. Cooperating with instructors, fellow students, and laboratory staff to maintain a professional environment conducive to learning and work.

Descriptors Help Assess Value

Descriptors give real examples of standards

When writing descriptors, think of

- Specific situations
- Specific students
- Measurable behavior
- Observable behavior



Descriptors

6. Initiative / Motivation	Seems unprepared for day. Gives impression of being uninterested.	Arrives prepared. Has looked ahead and studied what will be covered that day.	Proceeds on own, e.g. starts a bench, starts setting up area, performs QC or temp checks without being told.
	Indicates would like to leave early rather than study or complete additional tasks in section. Satisfied with "getting by" rather than actually learn material or skill. Prefers to "google" rather than think.	Asks for additional activities when assigned activities are complete. Concerned with learning info/skills needed to work as MLS/MT not just to achieve a good grade. Uses section links, releases resources to supplement lecture and lab material covered by instructor.	Helps with a depletion project in addition to student assignments.

1 2 3 4 5

7. Professionalism / Maturity	Does not follow Clinic, Hospital, or Program policies. Complains about policies and expectations.	Follows all Clinic, Hospital, and Program policies at all times and without complaint. e.g. makes appropriate time off requests, maintains confidentiality, maintains professional appearance. Focused. Engaged in learning activities and lab environment. Is a good representative of the laboratory profession.	Unsolicited positive feedback received from non-instructors or people outside section re: student's professional behavior or appearance.
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1 2 3 4 5

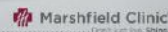
Value

What is the value of meeting the standard?

- Needs improvement
- Meets expectations
- Exceptional

Ultimate "value"

- Would recommend / not recommend for job



Comparison of Weighting on Final Grade

Didactic Only / Performance Only / 80%Didactic+20%Performance / 50%Didactic+50%Performance

Name	Chem	Heme	BB	ImmVir	Micro	UA/Phleb	Molec/Regional
Last First							
B, L	A/A/A/A	B/B/B/B	A-/B/A-/B+	B/B+/B/B	C-/C/C+/C	A/A-/A/A	B+/A-/A-/A-
D, D	A/A/A/A	A/A/A/A	A/A/A/A	B+/B+/B+/B+	B+/B-/B/B	A/A/A/A	A-/A-/A/A
E, S	A/A-/A/A	A-/A-/A-/A-	A/A/A/A	B/A-/B+/B+	B-/B/B/B	A/A/A/A	A/A/A/A
G, J	A/A-/A/A	B+/A-/B+/B+	B+/A-/B+/A-	C/B+/C-/B-	C-/B-/C/C+	A/A-/A/A	A-/A/A/A
G, L	A/A-/A/A	A/A/A/A	A/A/A/A	A/A-/A/A	A-/B/A-/B+	A/A/A/A	A/A-/A/A
P, T	A/A/A/A	A-/B+/A-/A-	A-/A/A/A	B/B+/B/B	B+/A/B+/A-	A/A/A/A	A/B+/A/A-
S, A	A/A-/A/A	B+/A/B+/A-	A-/B+/B+/B+	A-/A-/A-/A-	C+/B/B-/B-	A/A/A/A	B+/A/A-/A-
T, C	A/A-/A/A	A/A-/A/A	A/A/A/A	A/A/A/A	A-/A-/A-/A-	A/A/A/A	A-/A/A-/A

The "New" Performance Competency Evaluation



Case Study

~~ Conclusions ~~

The “New” Evaluation Tool...

Helps Us Be More:

Objective

- Focusing on work behaviors or performance, not personality

Honest

- Accurate, reliable, true, verifiable

Consistent

- Precise, reproducible, fair

Is a “Win-Win” for Everyone

For Student

- Provides constructive criticism and aids in transition from student to employee

For Instructors

- Provides objective means of providing honest, consistent feedback to students on behavior

For Potential Employers

- Provides honest, consistent info that allows comparison among potential employees

Outcomes

Better prepared students

- More realistically prepared students

Faculty comfortable w/ evaluation

Good basis for providing references

More Appropriately Represents the Individual

Not everyone is ‘wonderful’

Not everyone is ‘awful’

Give incentive to the good performers
to be recognized as good

Give incentive to the poor performers
to improve

Helps Answer the Ultimate Question

“Would you recommend this person
to a prospective employer?”

?

**MEDICAL LAB SCIENCE STUDENTS
PERFORMANCE/COMPETENCY EVALUATION**

Student: _____ Date: _____

Section / Rotation: _____

Evaluator(s): _____

Results of the Performance / Competency Evaluation will comprise 50% of the student's final grade for that section / rotation. The purpose of the evaluation is to provide feedback to the student on their performance as a laboratory professional. The Performance / Competency Evaluation is designed to be similar to and thus prepare the student for the type of employee appraisal process the student will encounter when employed.

This evaluation should be completed, reviewed with the student, signed, and submitted to the program director no more than ten days after the student has completed the rotation.

SECTION I

INSTRUCTIONS TO THE EVALUATOR:

Rate the student in each area by circling:

- 1 = Needs improvement. / Student is not performing as would be expected of entry-level MLS.
- 2, 3, 4 = Meets expectations. / Student is currently performing as entry-level MLS to varying degrees.
- 5 = Exceptional. / Student's performance is well above what would be expected of an entry-level MLS.

- Comments are required for ratings of 1 and 5. Comments should give specific examples of occurrences/situations that illustrate why rating is being assigned.
- Ratings of "1" may require remedial work by the student at the instructor's discretion or may result in the implementation of a Performance Improvement Plan.

Grading Scheme:

Approximate translation of numeric rating to letter grade:

4 & 5 = A, 3=B, 2=C, 1=F

Ratings for items 1-12 will be added for a total score. Translation of total score to letter grade:

42 – 56 = A

30 – 41 = B

18 – 29 = C

12 – 17 = F

COGNITIVE / ACADEMIC PERFORMANCE

1. Knowledge of Subject	Can relate minimal information outlined in the learning objectives.	Demonstrates good theoretical knowledge of the material covered. Can verbally relate the information outlined in the learning objectives. Performs at expected level on didactic (written) quizzes & exams.	Demonstrates unusual depth of understanding with productive discussion and probing questions. Grasps theoretical concepts usually understood after >1 yr experience.
--------------------------------	---	---	--

1

2

3

4

5

2. Application of Knowledge to Practice	Has difficulty translating knowledge to practice. Unable to proceed once directions are given.	Applies knowledge to bench work. Demonstrates ability to proceed based on initial findings, e.g. can perform Micro workups, BB product selection, problem sample procedure (Heme, Chem). Demonstrates appropriate decision making and problem solving skills for entry level MLS.	Can extrapolate knowledge and apply to low volume or seldom seen specimens or situations.
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1

2

3

4

5

3. Judgment: Problem Recognition & Resolution	Has difficulty distinguishing normal from abnormal situations. Doesn't recognize or proceed appropriately in problem situations (e.g. problem sample, QC out of range).	Recognizes normal vs. abnormal, normal flora vs. pathogen. Recognizes problem samples, e.g. short, lipemic, hemolyzed, inadequate ID, inappropriate collection. Proceeds appropriately in each case. Recognizes situations that require consultation with instructor or staff tech. Asks appropriate questions. Instructor would feel comfortable having student perform family member's testing, e.g. operate analyzer with family member's sample in run; perform dif, x-match, micro set-up/work-up.	Sees 'big picture'. Conveys understanding of how own actions have consequences, impact patient care (e.g., recognizing normal vs. abnormal, handling problem samples correctly) .
--	---	--	---

1

2

3

4

5

PSYCHOMOTOR / BENCH PERFORMANCE

4. Bench Maintenance	Work area not clean. Supplies not restocked. Handwriting difficult to read – illegible, small.	Work area left clean: area picked up, countertop cleaned/disinfected, garbage disposed of properly. Supplies restocked or instructor / staff notified of low levels. Microscopes cleaned. Handwriting neat and easy to read – very few cross-outs on logs or worksheets.	
-----------------------------	--	---	--

1

2

3

4

N/A

5. Bench Work: Skills & Pace	Everyday bench skills need improvement: e.g. better pipetting or isolation techniques. Hasn't developed work pace that would meet expected turn-around-times. Sacrifices accuracy for speed: e.g. makes mistakes, misses things by going too fast.	Does good work at the bench. Has good manual dexterity: e.g. good pipetting technique; good streaking, isolation. Demonstrates efficiency / balances speed and accuracy: can maintain appropriate work pace while producing accurate results – e.g. finishes expected number of difs, cross matches, antibody panels, instrument runs, set-ups, work-ups.	Demonstrates excellent multi-tasking skills usually seen in experienced techs.
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1

2

3

4

5

6. Safety Practices	Does not carry out safety practices at all times.	Observes all safety practices including wearing gloves, lab coats in appropriate areas; no food in lab; proper disposal of waste in red bag/clear bag/recycle bin.	
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1

2

3

4

N/A

AFFECTIVE / TEAM PERFORMANCE

7. Professionalism/ Maturity	Does not follow Clinic, Hospital, or Program policies. Complains about policies and expectations.	Follows all Clinic, Hospital, and Program policies at all times and without complaint : e.g. makes appropriate time off requests, maintains confidentiality, maintains professional appearance. Focused. Engaged in learning activities and lab environment. Is a good representative of the laboratory profession.	Unsolicited positive feedback received from non-instructors or people outside section re: student's professional behavior or appearance.
---	---	---	--

1

2

3

4

5

8. Attendance / Punctuality	Arrives late, leaves early. Takes extended time for breaks or lunch. Has unexcused absences. Present in area during unscheduled times (e.g. waiting for other students). Not in the area during scheduled times (e.g. instructor has to look for student).	Arrives in area and is ready to start at scheduled time. Remains in area until instructor indicates work is done. Takes breaks and lunch when instructor indicates and for appropriate length of time. Informs instructor and program director as early as possible of anticipated absences.	
--	--	--	--

1

2

3

4

N/A

9. Initiative / Motivation	Seems unprepared for day.. Gives impression of being uninterested. Indicates would like to leave early rather than study or complete additional tasks in section. Satisfied with "getting by" rather than actually learning material or skill. Prefers to "google" rather than think.	Arrives prepared. Has looked ahead and studied what will be covered that day. Asks for additional activities when assigned activities are complete. Concerned with learning info/skills needed to work as MLS not just to achieve a good grade. Uses section texts, references, resources to supplement lecture and lab material covered by instructor.	Proceeds on own. e.g. starts a bench, starts setting up area, performs QC or temp checks without being told. Helped with a dept/section project in addition to student assignments.
---------------------------------------	---	---	---

1

2

3

4

5

10. Responsibility	Does not accept responsibility for own work. Can't accept being wrong. Offers excuses or deflects blame to others.	Accepts responsibility for own work: acknowledges errors and learns from them. Accepts constructive criticism of skills or behavior and uses in positive manner for improvement.	
---------------------------	--	--	--

1

2

3

4

N/A

11. Interpersonal / Communication Skills	Unable to clearly convey ideas verbally or in writing. Dismissive or patronizing toward lab staff. Questions staff credentials. Communicates in confrontational rather than conversational manner. Brings cold or negative atmosphere to section.	Effectively conveys and receives ideas; responds appropriately. Is respectful of instructors and other lab staff. Appreciates instructors' knowledge, skills, experience. Interactive. Communicates in a positive and timely manner with instructors, lab staff, other students. Contributes to a positive work environment.	Unsolicited positive feedback received from non-instructors or people outside section re: student's communication skills with staff, visitors, or patients, e.g. offering diplomatic comments in difficult conversations, helping/directing visitors in hallway.
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1

2

3

4

5

12. Ability to Work in Clinical Lab Environment / Handle Stress	Seems tired frequently. Frustrates easily. Has difficulty coping with work volume, people, environment. Has difficulty adjusting to variations or changes.	Alert, interactive. Can "go with the flow." Performs well in busy lab environment. Deals well with variety of personalities. Demonstrates patience with instructors and coworkers, a process, or wait time. Demonstrates flexibility and ability to adapt to change, e.g. in schedule, instructors, test volume.	Demonstrated calmness, flexibility in unusual situation, e.g. very high work volume, computer down.
--	--	--	---

1

2

3

4

5

Section I Numeric Total = _____ Letter Grade = _____

SECTION II

13. Does this student follow required documentation protocol (checklists, logs, QC)?

_____ Adequately _____ Inadequately

Comment required if "Inadequately":

14. Do you have any reason to question this student's credibility?

_____ Yes _____ No

Comment required if "Yes":

15. Has this student completed the section / rotation learning objectives (cognitive, psycho-motor, affective) expected of him/her?

_____ Yes _____ No

Comment required if "No"; List objectives to be completed/corrected:

16. Do you recommend this student for certification eligibility in this area?

_____ highest recommendation- _____ recommend _____ recommend _____ do not
without reservation with reservations recommend

Comment *required*:

17. Would you recommend this student to a prospective employer?

_____ highest recommendation- _____ recommend _____ recommend _____ do not
without reservation with reservations recommend

Comment *required*:

SECTION III

Grade:

Numeric

Letter

The grade being reported is: Student Lab

Main Lab

Performance Eval (50%)

Final

Student Comments:

Instructor Comments:

Was this evaluation discussed with the student?

_____ Yes

_____ No

Instructor / Coordinator

Student

Date