



# The Balanced Scorecard as a Residency Performance Management Tool

Billie McGarran, BSHA, MHI, C-TAGME

Medical Residency Manager, Institutional Coordinator

Sollus Northwest Family Medicine Residency, Grandview, WA



# My Story...

- ▶ Montana native
- ▶ Migrated to Eastern Washington May 2020
  - ▶ Smack dab in the middle of COVID!
- ▶ GME? What's that mean? Should be easy!
  - ▶ I was dropped into a world of acronyms
    - ▶ ACGME / CCC / PEC / GMEC / NI / PD / APD / CME / DIO / IMG / NRMP / SI

# Objectives of a Balanced Scorecard

- Communication Tool
- Strategic Management Tool
- Prioritize & Measure

# Goals of a Balanced Scorecard

## Success / Areas of Opportunity

- The scorecard will allow leadership to identify at-a-glance areas where the program is doing well and areas that need addressed

## Committee Presentations:

- CCC
  - Milestone Evaluations
- PEC
  - Annual Program Evaluation
- GMEC
  - Annual Institutional Review
  - Executive Summary to the Board of Directors



# Blueprint of the Balanced Scorecard

- Medical Residency Manager owns the scorecard
  - Outlook
  - Monthly/Quarterly/Annual Updates
  - Resources
    - EPIC Reports
    - Internal Sponsoring Institution Reports
    - ACGME Reports
    - Other (ABFM/ACOF)

# Measurable Outcomes

- Outcomes
  - ACGME Resident Survey Results
  - Program Evaluation Results
  - ITE & Board Pass Rates
  - Continuity Clinic Tracking
  - Faculty Data
  - Work Hour Violations
  - Evaluations
  - Milestones
  - Recruitment Rate



# SNFMR Scorecard

AY 2022

AY 2021

AY 2020

AY 2019

AY 2018

AY 2017

≤50% Low 51-89% Mod ≥90% High (Special Review Trigger - Pattern of Significant Downward Trend)

ACGME Resident Survey	Resources	82.40	88.90	97.00	89.67	88.20	97.20	
	Professionalism	89.60	91.70	98.90	95.20			
	Pt. Safety & Teamwork	79.20	77.80	89.40	92.27	93.05	94.40	
	Faculty Teaching & Supervision	84.70	81.90	83.30	87.97	87.50	90.00	
	Evaluation	91.70	89.60	95.50	90.27	89.55	95.20	
	Educational Content	88.90	88.90	95.50	90.60	89.60	97.90	
	Diversity & Inclusion	97.20	91.70	97.00	100.00			
	Clinical Experience & Education	92.70	93.80	92.00	95.37	95.85	100.00	
	0-3.9 Low 4.0-5.0 High (Special Review Trigger - <4)							
	Overall Evaluation	>4	>4	>4	>4	>4	>4	

≤69% Low 70%-99% Moderate 100% High (Special Review Trigger - Below 70%)

Survey Completion Rate	100%	100%	100%	100%	100%	100%
------------------------	------	------	------	------	------	------

0.0-2.9 Low 3.0-3.9 Moderate 4.0-5.0 High

ACGME Well-Being Survey	I find my work to be meaningful.	3.8	3.8	3.8	3.6		
	I work in a supportive environment.	3.6	3.5	3.9	3.8		
	The amount of work I am expected to complete in a day is reasonable.	3.3	3.3	3.6	3.4		
	I participate in decisions that affect my work.	3.2	3.4	3.5	3.4		
	I have enough time to think and reflect.	3.2	3.1	3.4	3.3		
	I am treated with respect at work.	3.7	3.6	3.7	3.9		
	I feel more and more engaged in my work.	3.3	3.3	3.6	3.6		
	I find my work to be a positive challenge.	3.4	3.3	3.6	3.4		
	I find new and interesting aspects in my work.	3.5	3.3	3.7	3.6		
	I often feel emotionally drained at work.	2.7	2.6	2.9	3.0		
	After work, I need more time than in the past in order to relax.	2.3	2.2	2.5	2.2		
	I feel worn out and weary after work.	2.3	2.5	2.8	2.8		

# SNFMR Scorecard

AY 2022 - 2

AY 2021 - 2

AY 2020 - 2

AY 2019 - 2

AY 2018 - 2

AY 2017 - 2

0-299 Low 300-379 Moderate 380-800 High

ABFM ITE	Program Mean Scaled Score	313	323	315	378	337	
	PGY1 Mean Scaled Score	345	285	275	350	320	
	PGY2 Mean Scaled Score	298	320	363	345	370	
	PGY3 Mean Scaled Score	290	365	307	465		

<50% Low 51-89% Mod >90% High (Special Review Trigger - Concerns About Board Pass Rates)

Board Pass Rates	COMLEX Level 3 / USMLE Step 3 (Passed on First Attempt)	50%	100%	75%	100%	100%	100%
	Written ABFM / AOBFP (Passed on First Attempt)	100%	100%	100%	100%	100%	100%

PGY1 (0-99 Low 100 - 149 Moderate 150 + High)

Continuity Clinic Visits	PGY1 - A	142	133	148	143	184	196
	PGY1 - B	149	137	141	143	173	221
	PGY1 - C	134	125	144	132	163	
	PGY1 - D	140	141	141	158		

PGY2 (0-599 Low 600 - 649 Moderate 650 + High)

Continuity Clinic Visits	PGY2 - A	584	567	580	666	757	702
	PGY2 - B	566	638	557	601	773	709
	PGY2 - C	589	616	508	526		
	PGY2 - D	688	638	516			

PGY3 (0-1599 Low 1600 - 1649 Moderate 1650 + High)

Continuity Clinic Visits	PGY3 - A	1720	1843	1550	1800	1773	1852
	PGY3 - B	1764	1873	1616	1747	1787	1903
	PGY3 - C	1209	1766	1485			
	PGY3 - D	1883	1770				



# SNFMR Scorecard

		AY 2022	AY 2021	AY 2020	AY 2019	AY 2018	AY 2017				
(Special Review Trigger - Problems Identified from Internal Surveys)		Q1 2023	Q1 2022	Q1 2021	Q3 2020	Q1 2020	Q3 2019	Q1 2019	Q3 2018	Q1 2018	Q3 2017
YVFWC Burnout	Emotional Exhaustion (27-54 High 17-26 Moderate 0-16 Low)	20.6	23.1	19.6	20.1		11.3	10.2	15.6	11.8	
	Depersonalization (13-30 High 7-12 Moderate 0-6 Low)	8.3	4.8	5.1	3.7		1.1	3.1	3.8	2.4	
	Personal Accomplishment (0-31 Low 32-38 Moderate 39-48 High)	36.9	39.0	40.0	41.2		45.4	43.1	44.2	39.8	
(Special Review Trigger - Problems Identified from Internal Surveys)		Q3 2022	Q3 2021	Q4 2020	Q2 2020	Q4 2019	Q2 2019	Q4 2018	Q2 2018	Q4 2017	
YVFWC Engagement	Engagement (12-24 Low 25-47 Moderate 48-60 High)	48.9	51.1	52.3		54.2	54.9	53.9	52.7	49.5	
	Retention (5-10 Low 11-19 Moderate 20-25 High)	20.4	21.3	21.8		23.2	23.0	22.7	22.3	20.8	
0.0-3.0 Low 3.1-4.59 Moderate 4.6-5.0 High											
SNFMR Program Evaluation	I have the opportunity to actively manage my own patients		4.75	4.55	4.67	4.50					
	I have an adequate mix of continuity, chronic disease, pediatric, and acute visits.		4.33	4.18	4.50	4.57					
	I receive adequate inpatient supervision		4.33	3.91	4.44	4.63					
	I receive adequate outpatient supervision		4.83	4.82	4.89	4.75					
	There are sufficient resources to support resident safety & their education needs.		4.50	4.55	4.78	4.63					
	The rapport between residents and faculty is good.		4.83	4.64	4.89	4.88					
	I receive adequate feedback on my performance as a resident.		4.67	4.73	4.78	4.75					
	I receive sufficient opportunity to perform procedures to prepare me for independent practice.		3.83	3.73	4.22	4.13					
	The program treats the evaluations that I complete confidentially.		4.58	4.45	4.44	4.38					
	The program uses the evaluations that I complete to improve the program.		4.33	4.27	4.44	4.25					
0.0-3.0 Low 3.1-4.59 Moderate 4.6-5.0 High											
SNFMR OMT Evaluation	I receive sufficient education in osteopathic philosophy and practice		3.75	3.67	4.71	4.38					
	I have sufficient opportunity to practice OMM in a variety of patient care settings.		3.88	4.00	4.86	4.50					
	I have sufficient access to resources and support for osteopathic scholarly activities.		3.88	4.63	4.57	4.63					

# SNFMR Scorecard

AY 2022 - 2023

AY 2021 - 2022

AY 2020 - 2021

AY 2019 - 2020

AY 2018 - 2019

AY 2017 - 2018

(Special Review Trigger - Pattern of Resident or Faculty Attrition)

Resident & Faculty Attrition	AY 2022 - 2023	AY 2021 - 2022	AY 2020 - 2021	AY 2019 - 2020	AY 2018 - 2019	AY 2017 - 2018
Faculty (Two Core Faculty per Six Residents)	1	2	2	2	2	1
PGY1	4	4	4	4	4	2
PGY2	4	4	4	3	2	2
PGY3	4	4	3	2	2	2

0-1 Low 2-3 Moderate >4 High

Faculty Scholarly Activity	AY 2022 - 2023	AY 2021 - 2022	AY 2020 - 2021	AY 2019 - 2020	AY 2018 - 2019	AY 2017 - 2018
Program Director	1	3	2	1	1	2
Associate Program Director	1	3	3	1	3	
Core Faculty		2	2	2	3	3

≥44 High 21-43 Moderate ≤20 Low

Work Hour Violations	AY 2022 - 2023	AY 2021 - 2022	AY 2020 - 2021	AY 2019 - 2020	AY 2018 - 2019	AY 2017 - 2018
Number of Work Duty Hour Violations (Excludes Short Break Violations starting AY 21-22)	0	1	20	7	20	10

0.0-2.59 Low 2.60-3.99 Moderate 4.0-5.0 High

SNFMR Evaluations	AY 2022 - 2023	AY 2021 - 2022	AY 2020 - 2021	AY 2019 - 2020	AY 2018 - 2019	AY 2017 - 2018
360 Resident Evaluation by Non-Faculty (Overall Resident Abilities/Skills)	2.62	3.41	3.57	3.58	3.58	
Monthly Resident Rotation Evaluation (Overall Resident Abilities/Skills)	3.28	3.42	3.25	3.24	3.74	
Quarterly Resident Continuity Clinic Evaluation (Overall Resident Abilities/Skills)	3.03	3.10	3.00	3.00	3.16	
Resident Evaluation of Inpatient/Outpatient Attending (Overall Faculty/Attending Teaching Skills)	3.65	3.68	3.65	3.72	3.74	
Quarterly Continuity Clinic Preceptor Evaluation (Overall Faculty Teaching Skills)	3.76	3.64	3.68	3.82		

		AY 2	AY 2	AY 2	AY 2	AY 2	AY 2	
<b>Interpersonal &amp; Communication Skills</b>								
<b>Milestones</b>	PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	2.37	2.42	2.08	3.16	2.19	2.25	
	PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	3.34	3.25	3.20	2.88	3.75	3.25	
	PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.83	4.29	3.50	4.75	4.19	3.19	
	<b>Medical Knowledge</b>							
	PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	2.13	2.44	1.56	2.19	2.19	1.88	
	PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	2.94	2.94	2.75	2.67	3.13	3.63	
	PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.63	3.94	3.25	4.00	4.00	3.63	
	<b>Osteopathic Principles</b>							
	PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	2.25	1.96	1.93	2.89	2.30	2.54	
	PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	2.71	3.32	3.10	3.00	3.57	2.50	
	PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.98	4.32	3.60	4.32	3.89	3.04	
	<b>Patient Care</b>							
	PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	2.15	2.15	1.79	2.13	2.23	1.95	
	PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	3.00	3.10	2.77	2.63	2.95	3.25	
	PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.90	4.03	3.41	4.00	4.00	3.65	
	<b>Practice-Based Learning &amp; Improvement</b>							
	PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	2.38	2.44	1.69	2.46	1.96	1.67	
	PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	3.13	3.19	2.88	3.00	3.25	3.42	
	PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.88	4.19	3.17	3.92	4.08	3.50	
	<b>Professionalism</b>							
	PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	2.39	2.75	1.83	3.28	2.22	2.50	
	PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	3.62	2.75	3.58	2.79	3.81	3.44	
	PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.75	4.33	3.44	4.50	4.44	3.19	
	<b>Systems-Based Practice</b>							
PGY1 (≤ 0.99 Low 1.0-1.99 Moderate ≥ 2.0 High)	1.97	2.00	1.94	2.13	2.03	1.81		
PGY2 (≤ 1.99 Low 2.0-2.99 Moderate ≥ 3.0 High)	2.85	2.91	2.56	2.75	3.19	3.19		
PGY3 (≤ 2.99 Low 3.0-3.99 Moderate ≥ 4.0 High)	3.63	3.91	3.38	4.13	3.94	3.44		



# In Conclusion



Program Director Buy-In



Present to  
Program  
Committees:

CCC  
PEC  
GMEC



Long Term Goals:

Didactics &  
Medical  
Knowledge  
Education Plan  
(MKEP)



Questions?