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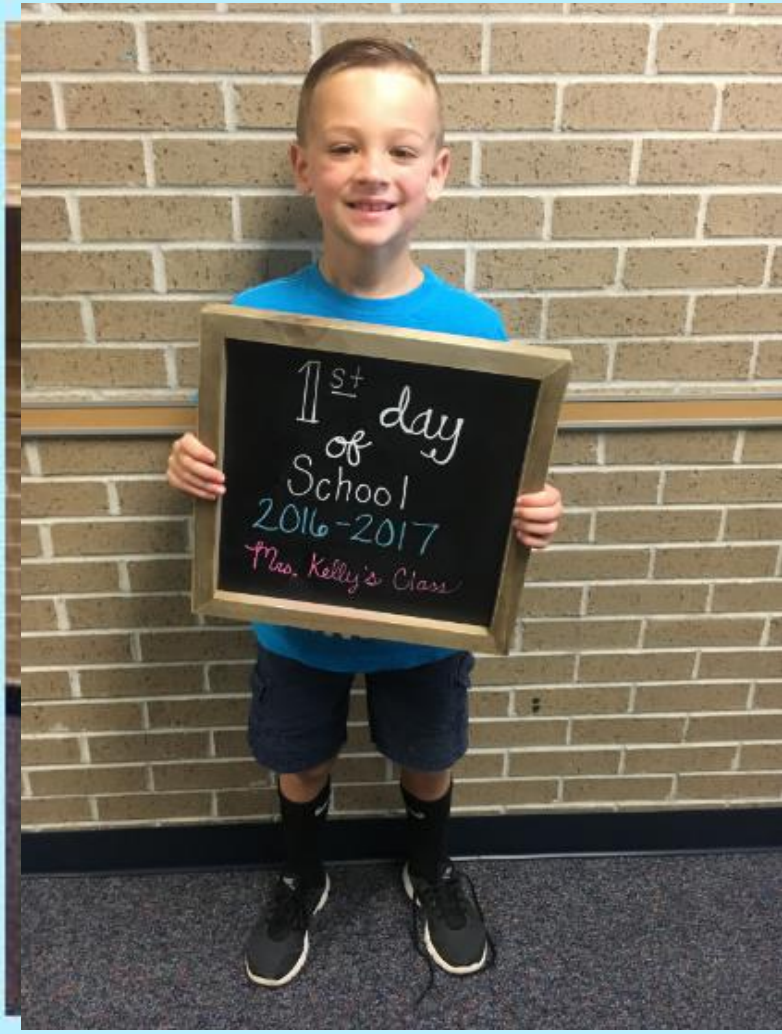
Alignment and Accountability: Part 2

90 Day Plans, Validation Matrix, and Monthly Meeting Model

Kelly Dickey, Coach Specialist
September 7th, 2016

Grading Period Average: A

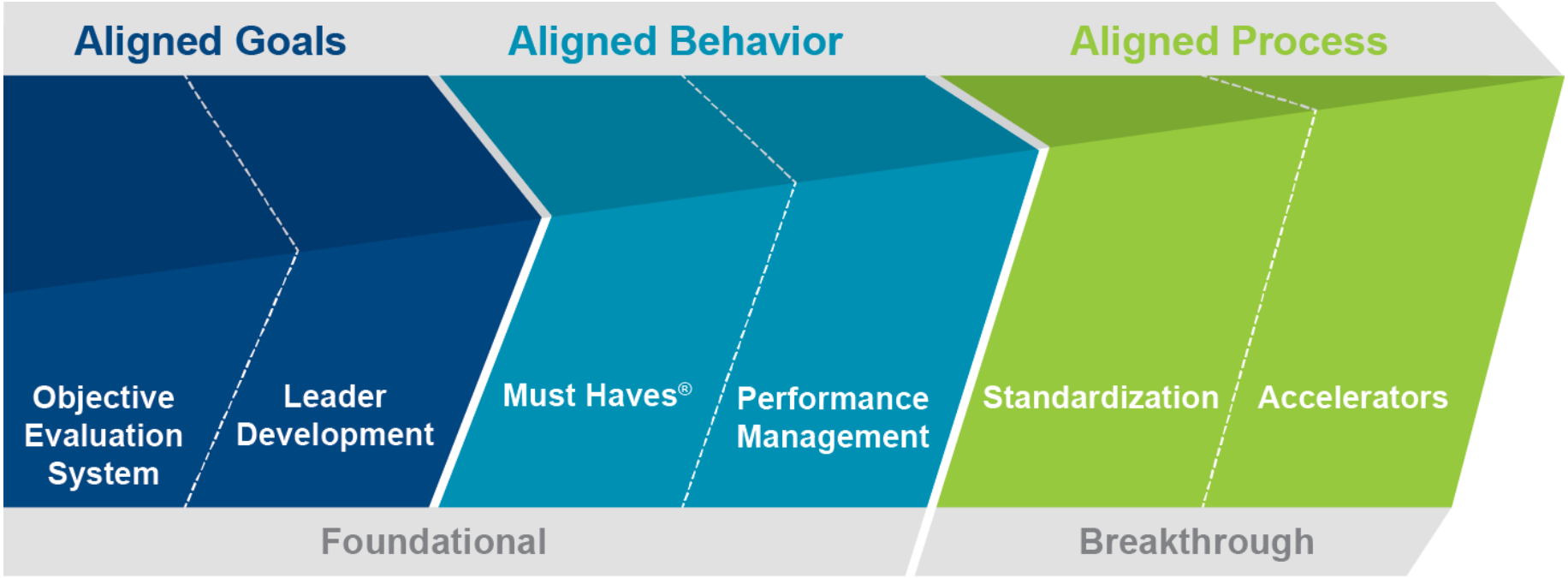
GP	Assignment	Grade	Max
1	Spelling Test #1	100	100
1	What is pal Vocab Test	100	100
1	What is a pal comp. Test	90	100
1	Nouns/Action words Test	100	100



Session Objectives:

- Review tips on how to create 90 day action plans that yield measurable achievement.
- Understand the Validation Matrix and how it helps support leaders in managing key leadership behaviors.
- Learn how to carry out effective supervisory meetings that create action and remove barriers to success.

Execution Framework: Evidence-Based LeadershipSM



LEADER EVALUATION
Implement an organization-wide leadership evaluation system to hardwire objective accountability

LEADER DEVELOPMENT
Create process to assist leaders in developing skills and leadership competencies necessary to attain desired results

MUST HAVES®
Rounding, Thank You Notes, Employee Selection, Pre and Post Phone Calls, Key Words at Key Times

PERFORMANCE GAP
Re-recruit high and middle performers, Move low performers up or out

STANDARDIZATION
Agendas by pillar, peer interviewing, 30/90 day sessions, pillar goals

ACCELERATORS
Leader Evaluation Manager®
Validation Matrix℠
Provider Feedback System℠
Studer Group Rounding
Patient Call Manager™

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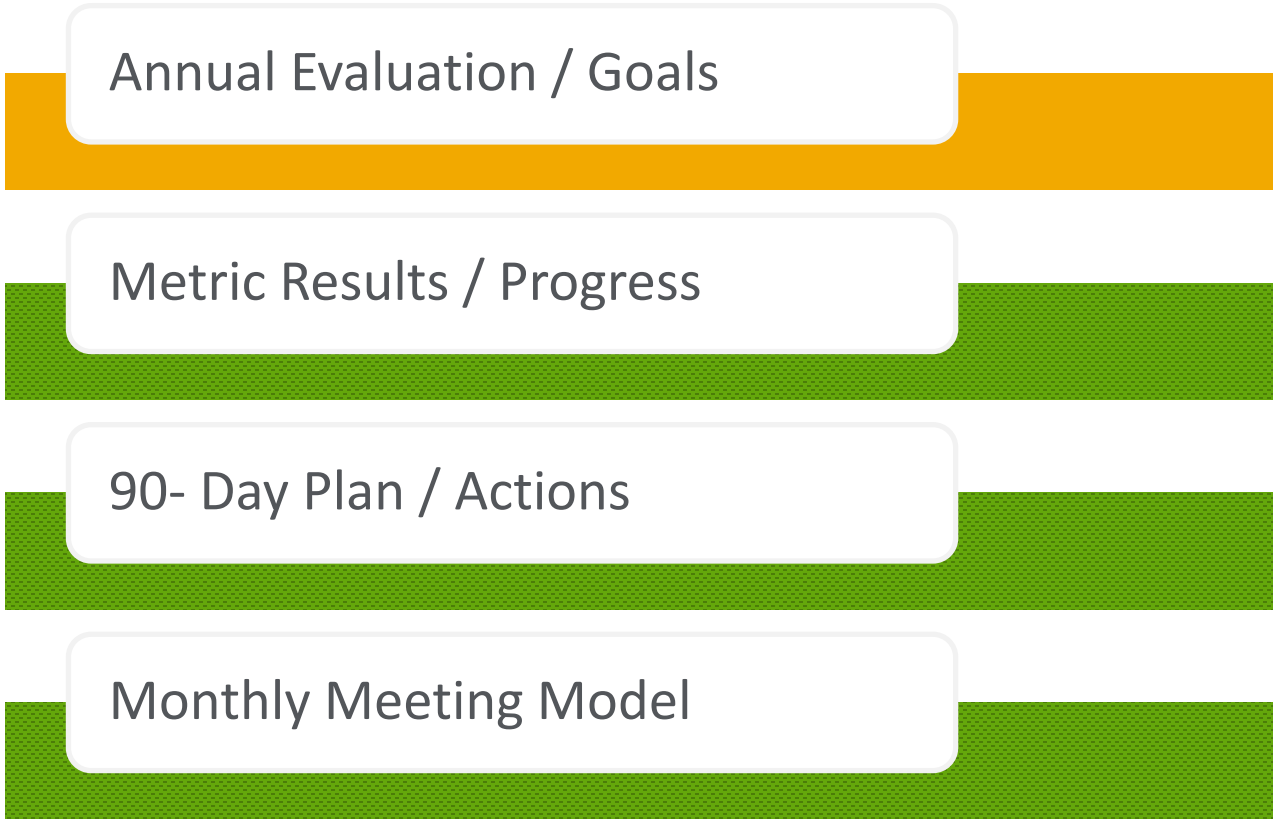
Accountability Tools

"...Leaders must be diligent about cutting out the noise to get their organizations focused on what really matters."

HBR's May 2014 issue entitled The Trouble with Leadership Theories



Reminders:

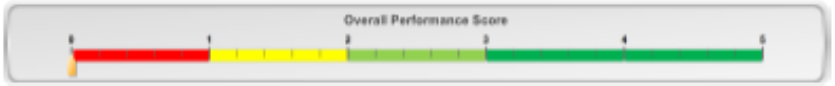
- Not necessary to have a goal under each pillar
- Choose goals from the template library first – then create custom goals using the goal wizard.
- No weights less than 10% (10% awareness, 20% focus, 30% urgency)
- Less is more
- Goals must be quantifiable
- Focus on results, not tactics, projects, or certifications
- Targets should be aggressive yet realistic

79% of leaders goals have been loaded into LEM – Deadline 9/6/16

“If you don’t know where you are going, any road will get you there.”

Pre-work:
Bring your roadmap!

Total Weight:	100/ 100
Overall Performance Score:	0.00



Pillar	Goal	Rating Description	Result	Total Weight	Score	Weighted Score	Status
People	Increase organizational engagement to 61st percentile based on PCA results.	Higher is better 5 is 75 and above 4 is 61 to 74 3 is 50 to 60 2 is 35 to 49 1 is 34 and below		25%	0	0	
People	Increase the Arkansas MBO's physician satisfaction to greater than the 37th percentile.	Higher is better 5 is 40 and above 4 is 38 to 39 3 is 37 to 37 2 is 28 to 36 1 is 27 and below		10%	0	0	
Quality and Safety	Achieve 61st percentile for Quality on our LOM report provided monthly	Higher is better 5 is 75 and above 4 is 60 to 74 3 is 50 to 59 2 is 25 to 49 1 is 24 and below		10%	0	0	
Quality and Safety	Maintain Safety at 75th percentile or Better for market based on our LOM report	Higher is better 5 is 90 and above 4 is 75 to 89 3 is 60 to 74 2 is 50 to 59 1 is 49 and below		10%	0	0	
Patient Experience	Increase CHI St. Vincent market inpatient annual percentile composite patient experience scores to the 61st percentile.	Higher is better 5 is 75 and above 4 is 61 to 74 3 is 50 to 60 2 is 35 to 49 1 is 34 and below		15%	0	0	
Growth	Average annual percentage increase in total MBO Operating Revenue excluding ecquisition activity. baseline equals average annual increase in Operating Revenue for the 3 year period FY2011-FY2014 excluding acquisitions in 2012 and thereafter (KYONE, Highline, Harrison, Alegent, SLHS, MHEST, Hot Springs) to reflect organic/same store Average Annual growth Rate (AAGR) for the 3 year baseline period.	Higher is better 5 is 7.3 and above 4 is 6.9 to 7.2 3 is 4.8 to 6.8 2 is 3 to 4.7 1 is 2.9 and below		10%	0	0	
Finance	Achieve FY17 Operating EBIDA Budget	Higher is better 5 is 100 and above 4 is 80 to 99.9 3 is 62.5 to 79.9 2 is 50 to 62.4 1 is 49.9 and below		20%	0	0	

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Accountability Tools

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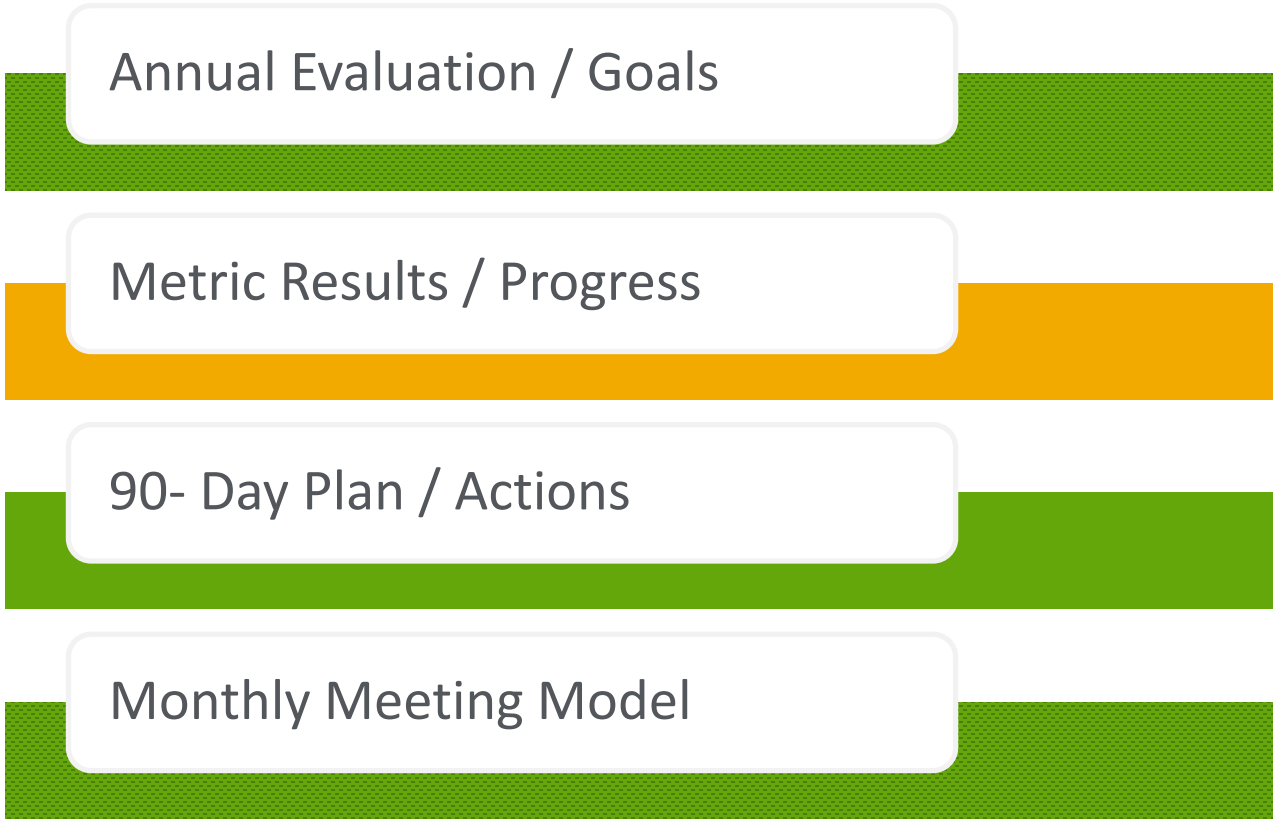

Monthly Report Card – Results owned by you

Goal

Increase organizational engagement to 61st percentile based on PCA results.

Goal Created From Template	Organizational Engagement (Market)
Result	
Calculation Method	Whole Number
Year-end Method	Last
Units	percentile

Jul	Aug	Sep	Oct	Nov	Dec	Ja

Monthly Report Card – Results entered for you

Goal

Increase CHI St. Vincent market inpatient annual percentile composite patient experience scores to the 61st percentile.

Goal Created From Template	Patient Experience - Inpatient (Market)
Result	
Results Entered By	Petrus, Cara
Calculation Method	Whole Number
Year-end Method	Last
Units	percentile

Jul	Aug	Sep	Oct	Nov	Dec

Accountability Tools

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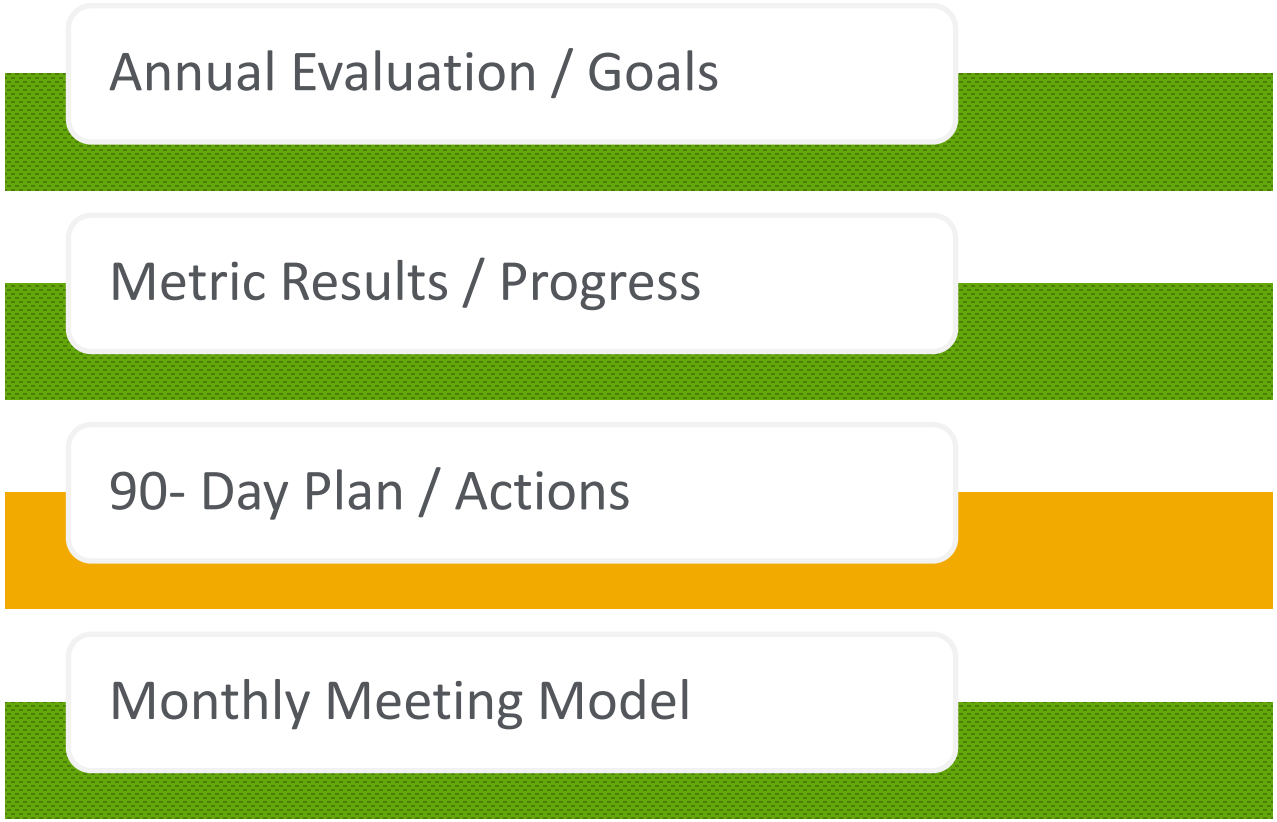


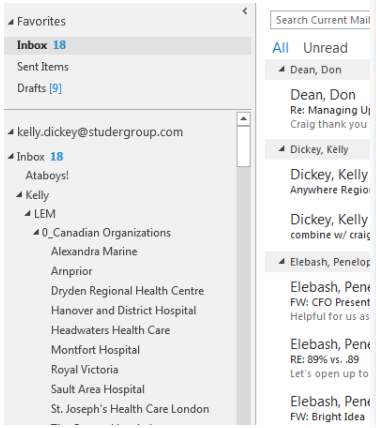
Why Organizational Change Fails

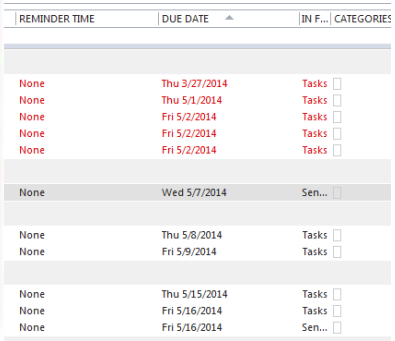
- Dots are not connected consistently to purpose, worthwhile work and making a difference
- Do not achieve critical mass - Lack of balanced approach
- Absence of an objective accountability system
- Leaders do not have the training to be successful

- Too many new behaviors introduced at once – need of sequenced approach
- No process in place to re-recruit the high and middle performers and address low performers
- Inability to take best practices and standardize across organization
- Failure to have leaders “always” do desired behaviors

Source: *Studer Group. Organizational Change Processes In High Performing Organizations: In-Depth Case Studies with Health Care Facilities. Alliance for Healthcare Research. 2005.*

Variation in managing to-dos…





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What is a 90 day plan?

- ✓ Plate Manager
- ✓ Prioritization Tool
- ✓ Communication Tool

- A living and breathing process – this should not be a one and done activity.
- Not a check in the box – if at any point you feel this is not a valuable process for you - assess how you are using the tool.
- At the end of the day, leaders leave your office with urgency and clarity of focus.

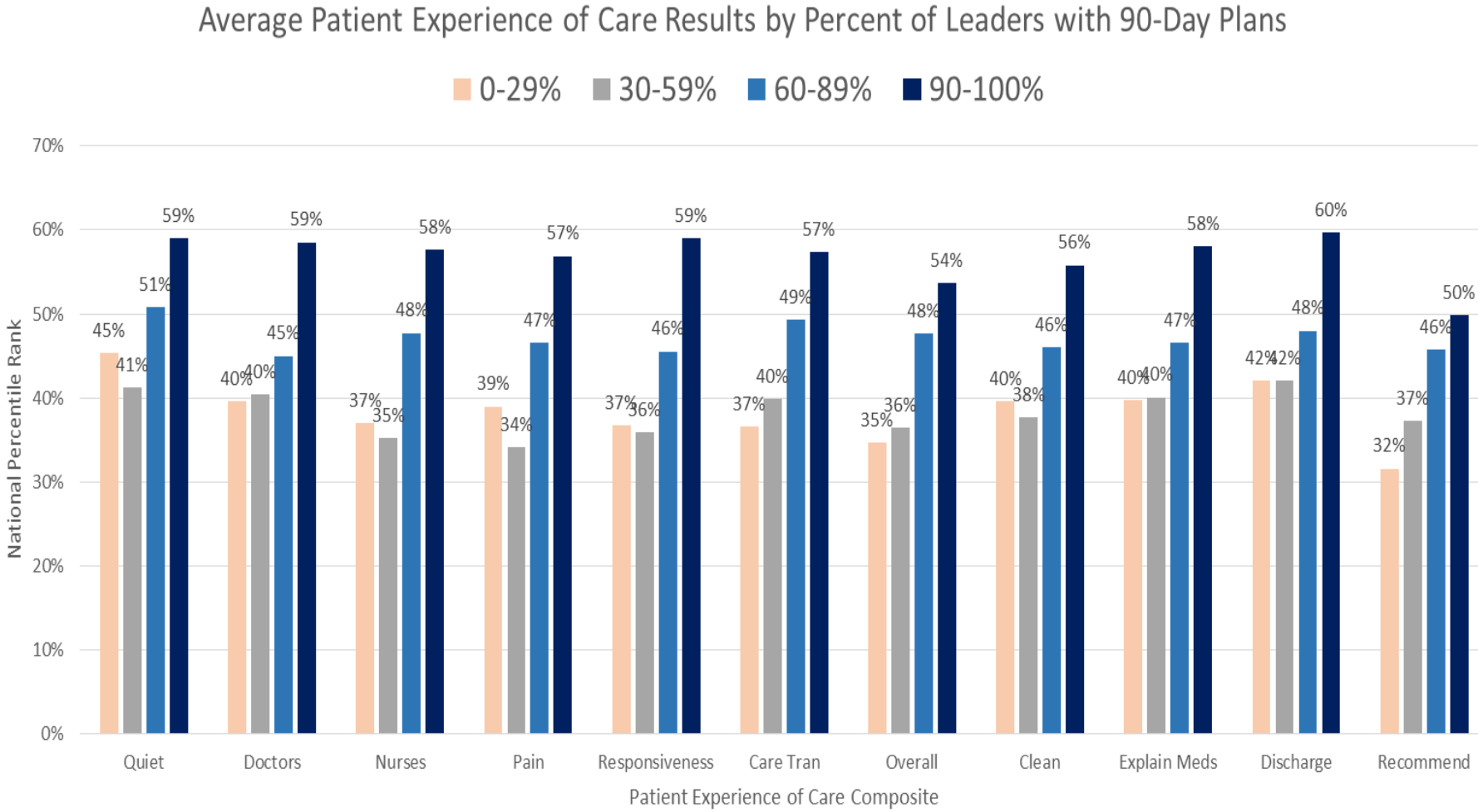
Value to You

- When you see progress it feels less overwhelming
- Breaking down key action steps makes work more manageable
- Helps you maintain focus and priority
- Allows you to review with your leader
- One less place to document!

Value to Your Supervisor

- Helps supervisor see what's "on your plate"
- Allows supervisor to provide direction by identifying the top priorities
- Guides discussion on any resources required, obstacles, or competing priorities so you can be successful
- Encourages managing up opportunities

Patient Experience of Care by Percent of Leaders with Plans



Pain Focus: Stakeholders and Weights

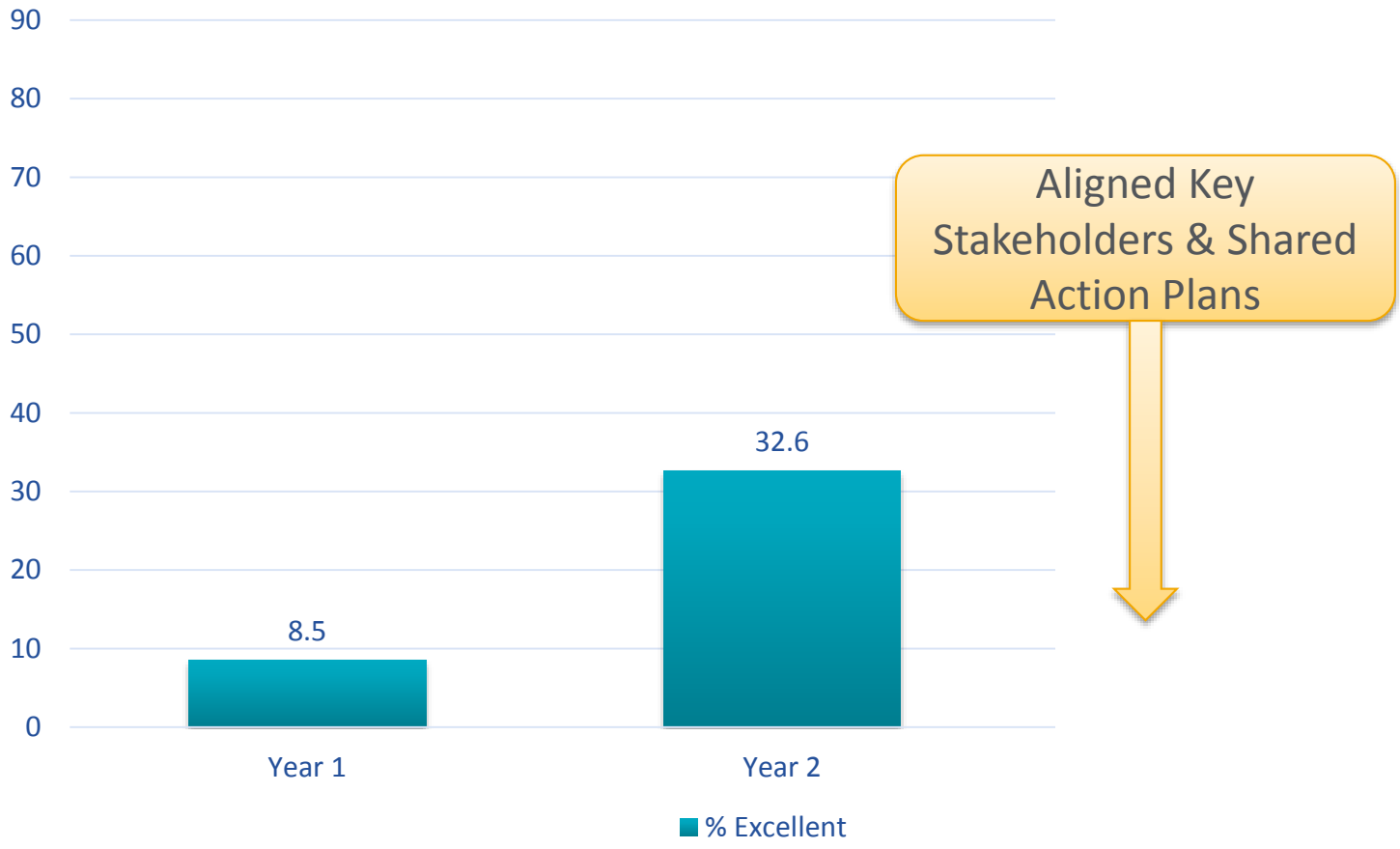
Goal: Increase % of Excellent score for Staff's Management of Pain by 5% to 54% from FY13 baseline of 49% as measured by PRC.

- Hospitalist – 30%
- CNO – 20%
- Emergency Services – 20%
- Same Day Surgery – 20%
- Pharmacy – 15%
- Radiology – 15%
- Rehab Services – 10%
- CEO – 10%

90 Day Plan items:

- Audit for compliance with white boards and Hourly Rounding®
- Ensure patients have medication prior to being sent for test/treatments
- Nursing to work with rehab staff for strategies to assist with pain
- Individualized patient care for specific pain needs
- Discharge planning – discuss prescriptions being sent home
- Pain mgmt. and KWKT training
- Hourly Rounding® to address pain, position, and potty
- Use white board in patient rooms to record pain score and update regularly with patient
- Reward and recognize staff who are observed using white boards and working to address pain

Pain Management Improves:



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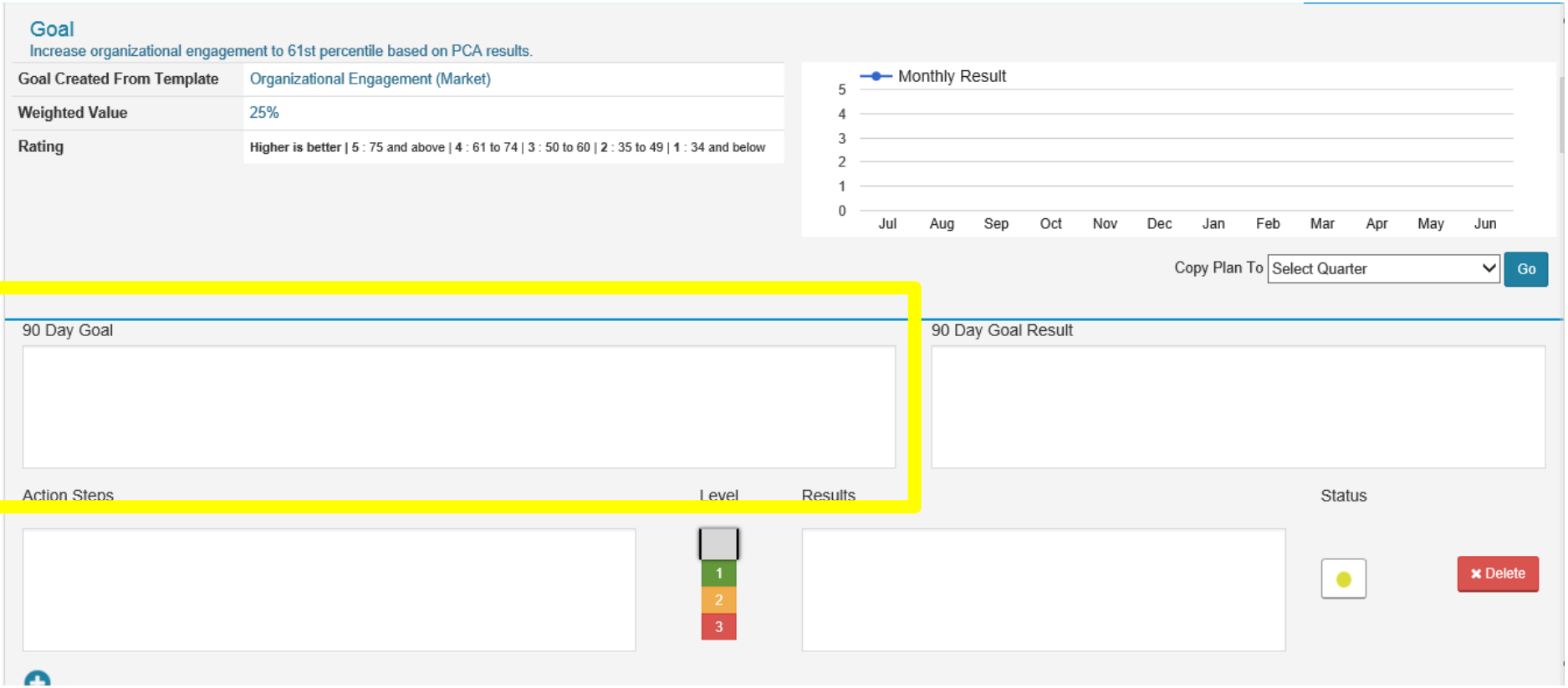
LEM: 90 day plan



Elements of an Effective 90 day Goal

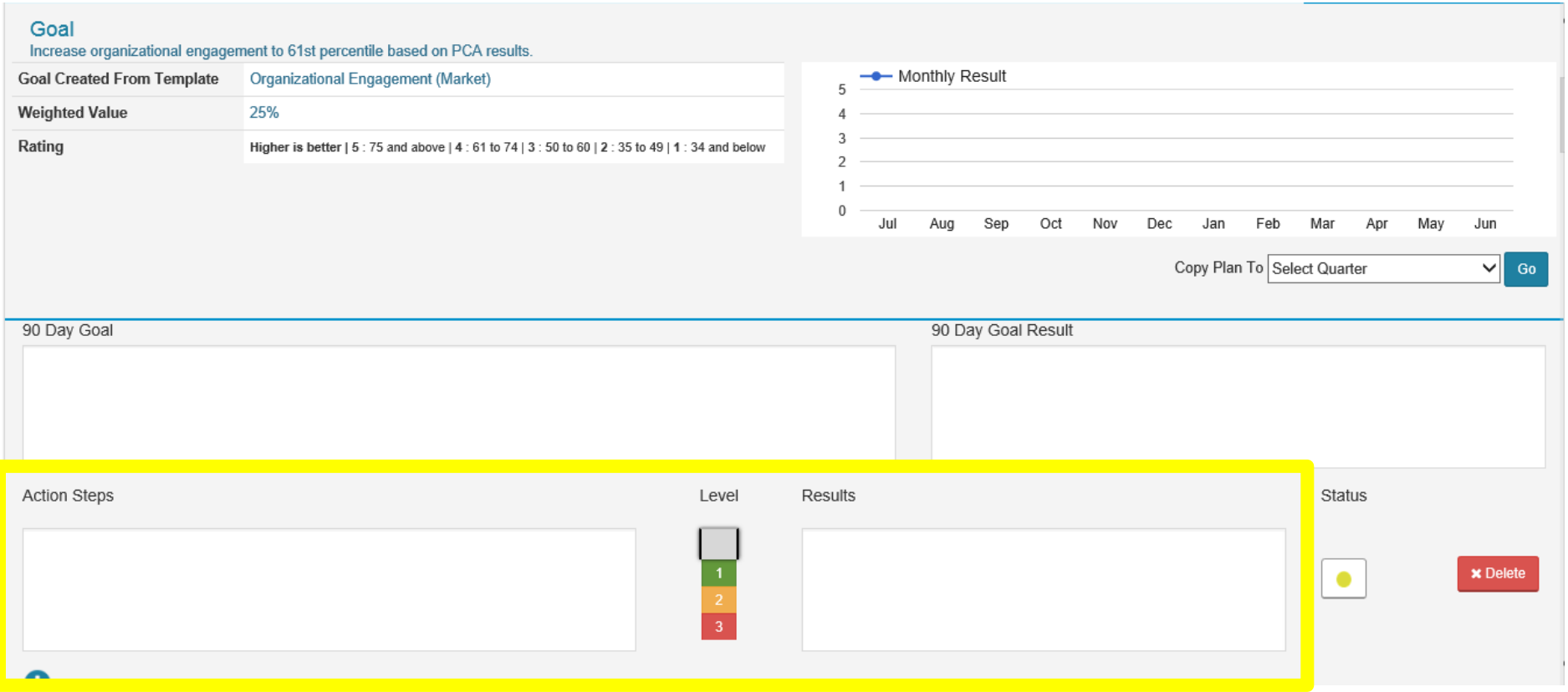
Overall Goal

- Annual goal is evident to align quarterly goals easily

Quarterly goals / milestones

- Effectively written to push incremental progress towards the annual goal
- Can be accomplished with measurable progress within the 90-day period
- Includes verbiage: Increase/Decrease/Maintain…to the amount of…

LEM: 90 day plan



Goal for the Year: Increase organizational engagement to 61st percentile based on PCA results

90 Day Goal	90 Day Goal Result
Improve communication results by 10% based on pulse survey (baseline 40%)	

Action Plan	Level	Results
Complete Co-Worker rounding on prescribed schedule	1	Rounded on 100% of Co-Workers in given timeframe
Assure up to date and complete stoplight report posted in department (and include updates at department meetings)	1	Stoplight report posted in break room (using new stoplight report document provided at LDI) and updated monthly
Assure consistent department meetings increasing frequency to allow for more attendance	1	Increased department meetings from 2 to 3 to assure night shift attendance. Attendance increased by 25%
Provide pulse survey via Survey Monkey to assess effectiveness of communication with increased departmental meetings	1	Results pending-To be sent out December 10th with one week timeline

Goal for the Year-To decrease the rate of total number of falls with injury per 1000 patient days by 30% for inpatients only

90 Day Goal	90 Day Goal Results
Reduce falls from raw number baseline of 20 to 15	

Action Plan	Level	Results
Assure high risk fall patients are identified based on criteria through audit process 1. Includes appropriate signage 2. Identification in shift huddles	1	100% of high risk patients properly identified
Validate use of bed alarms on high risk fall patients daily	1	80% of bed alarms used on high risk patients
Implement frequent rounding on high risk fall patients and monitor compliance	1	Rounding increased to hourly for high risk fall patients. Compliance-65%

Tips for creating 90 day action steps

- Focus on actions that will drive outcomes (practices that get results)
- Don’t set yourself up to fail – what can you truly accomplish within 90 days?
- Identify 1-2 key tactics to achieve the 90 day goal
- Assess effectiveness of previous action steps
- Use goal weights to get your tactics in the right order!

MORE - Tips for creating 90 day action steps

- Involve co-workers and other stakeholders - share ideas
- Start with the end in mind – how do you want to end the performance period?
- Advance the plan and update regularly!
- Be specific to the STRATEGIES you are putting into place, not simply the assignments on your plate!
- Plans apply to all leaders and all goals – regardless of performance towards goal. This helps us to stay focused!

This is how to accomplish a goal:

- Clarify the goal (90 Day Goal)
- Identify the steps needed (Action Steps)
- Know how to keep your leader informed (Level)
  - 1- Go full speed ahead
  - 2- Go full speed ahead, but check with me before you launch
  - 3- Don’t move without approval
- Regular, routine process for evaluating progress (Results / Status)

Let's practice:

Time: 10 minutes

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90 day plan feedback

Time: 10 minutes

- Share your 90 day plan with a colleague.
- Ask them to review and provide feedback via the 90 day plan feedback form.
- Discuss their feedback to improve your 90 day plan.

Criteria	Yes	No	NA	Comments
1. Is there a 90-day goal identified?				
2. Is the 90-day goal realistic?				
3. Do the action steps reflect the utilization of practices that will get results?				
4. Do the actions steps address connecting staff to purpose (defining the why)?				
5. Do the action steps reflect practice and validation of new behaviors (making sure people have seen what doing it "right" looks like)?				
6. Do the action steps reflect a plan for recognizing the associates/physicians who are consistently using the new/prescribed behaviors?				
7. Do the action steps reflect a plan for performance management for associates/physicians who are inconsistently using the new/prescribed behaviors?				
8. Are the dates to accomplish the actions steps realistic?				
9. Is the "Managing Up" Column filled out?				
10. Does the information in the "results" column reflect the status of completing the action?				

What do you like about this 90-day plan?

What your suggestions on how this leader can take the use of this tool to the next level?

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Pilot Safety Checklist

Why do pilots stay disciplined and use checklist, even after it becomes routine?

- Before every takeoff and every landing, there are several routine checks which need to be done in order to provide the highest maximum safety to passengers.

- You stay vigilant by having seen things go wrong.

- You want to find any problems you can while you're on the ground, because if you take a problem into the air with you it's a decision you can quickly come to regret.

Validation Matrix =
Your safety checklist!

What's expected of me each month?

How do we validate I've done those things?

What keeps me from always, or what results have come from consistent execution?

Validation Matrix

Davenport, Polly | Aduddell, Chad | Administration | MARKET CEO | CHIEF OPERATING OFFICER

Co-worker Engagement

Name	Leader Rounding on Co-workers
Description	Round on co-workers at the prescribed frequency using the leader rounding log; 30 or fewer co-workers = monthly 31-60 co-workers = every other month Over 60 co-workers = quarterly
Verification Method	Monthly Meeting Model
Result Frequency	Monthly
Year End Method	Average
YTD Calculation Score	

Actual/Goal	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Actual							
Goal							

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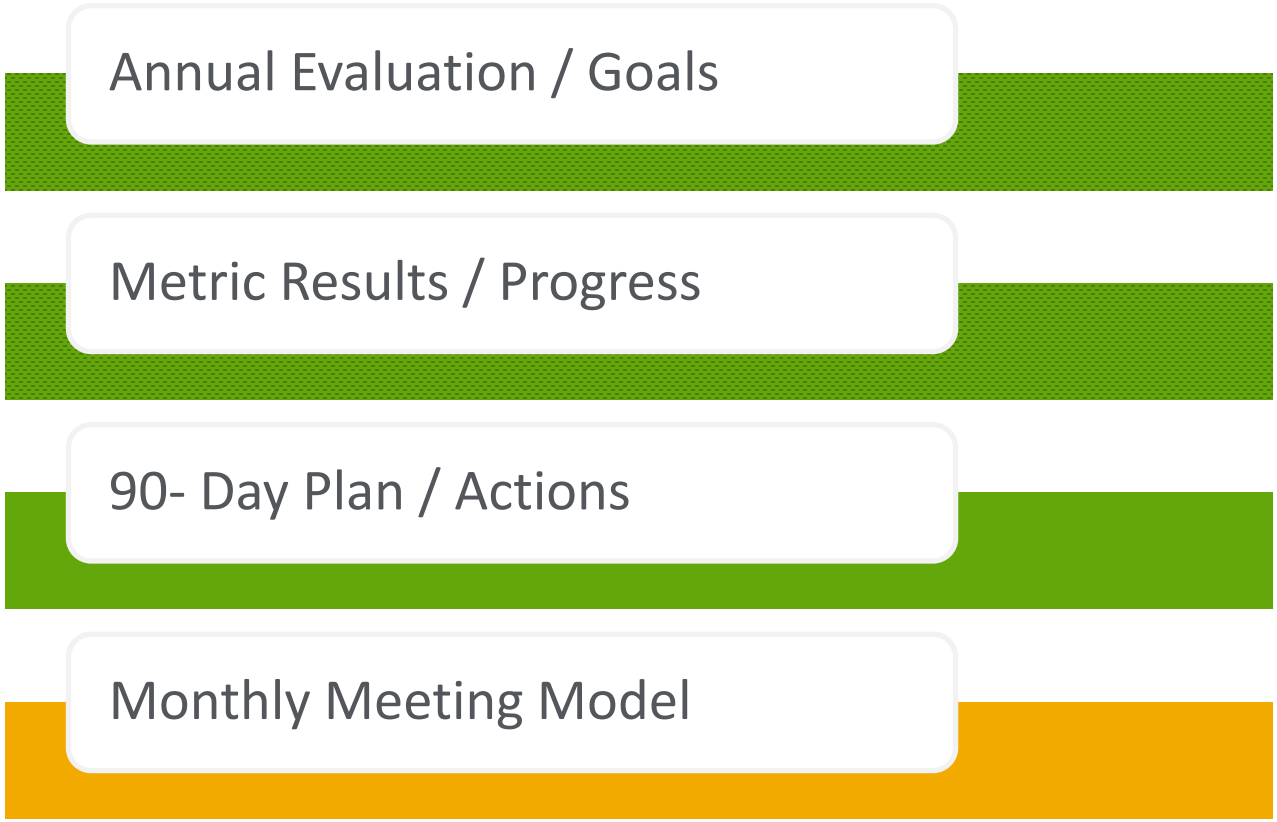


Monthly Meeting Model: The WHY

- Drive effective, results oriented leader performance conversations to develop successful leaders.
- Proactive vs. Reactive leadership to achieve results
- Transparent, interactive communication
- Solution focused
- Focused on professional development

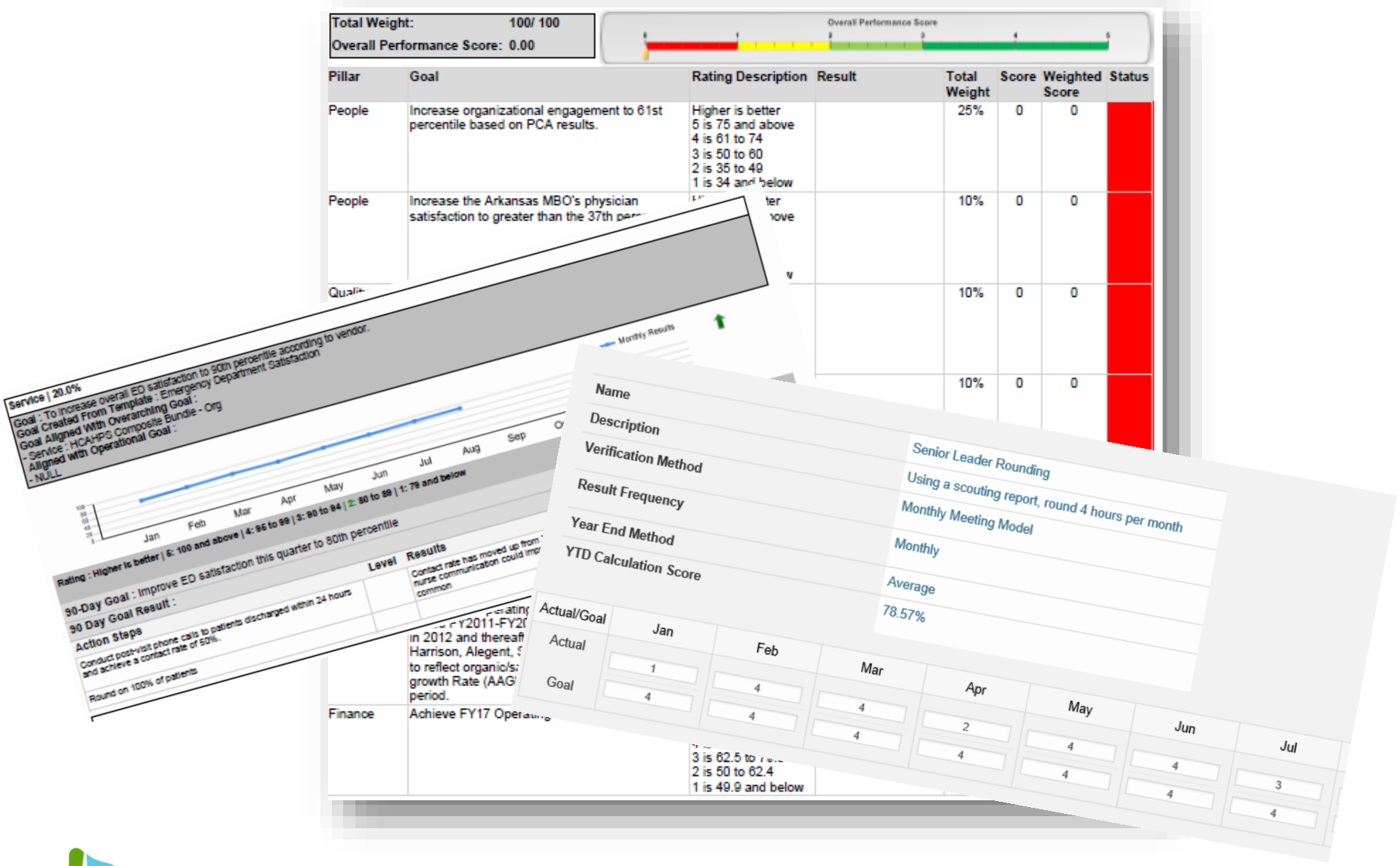
Monthly Meeting: The WHAT

- Establish a consistent, standardized reporting model focused on results, starting with those reporting to CEOs, Presidents, Vice Presidents, and AVPs.
- A regularly scheduled meeting that occurs at least once a month for 60 minutes between a leader and his/her direct supervisor
- A standardized agenda is used by all leaders
- Leader communicates expectations to direct reports in advance of the meeting (date/time/information to bring, etc.)

Monthly Meeting: The HOW

- Review documentation logs of key behaviors that are being used to achieve results
- Review LEM Goals and Progress
- Review Validation Matrix
- Review of LDI Linkage grid to confirm status of completing linkage assignment
- Professional development conversation
- Confirm and document action items to complete before next meeting.

Tip: Be Prepared & Maximize the use of technology!



Checklist for effective Monthly Meetings

Direct reports should prepare and bring:

- LEM Results and 90 day plans are up to date
- Rounding logs/Stoplight reports
- Sample of Thank You note
- 30/90 Day Reviews (as applicable)
- LDI Linkage Grid (as applicable)
- Other key documents requested by One Up leader

Key actions for effective monthly meetings:

Leader Pulls Up LEM to Review

- LEM current score
- Monthly Report Card (results)
- 90 Day Work Plan
- Validation Matrix

Monthly Meeting - key components:

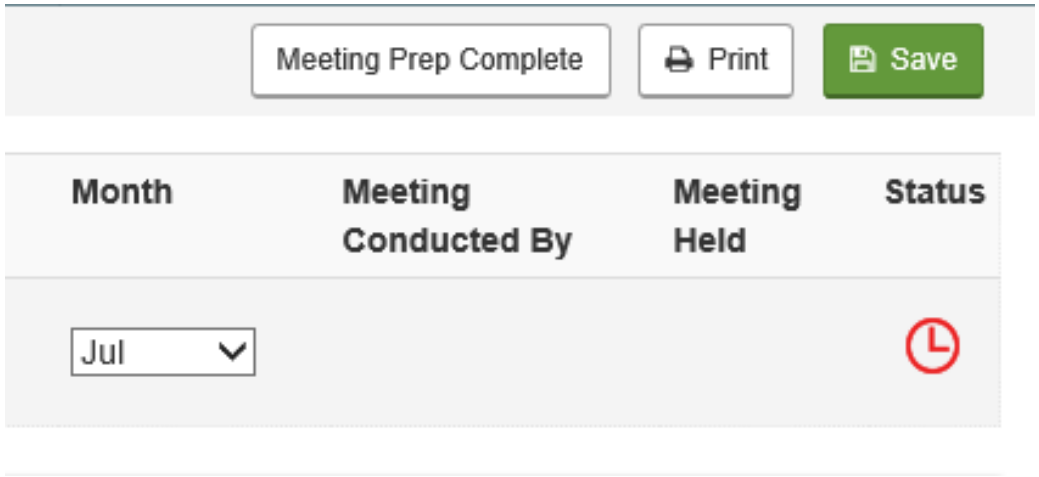
- Round on Direct Report
- Focus on positive outcomes and trends first (WINS)
- Review of performance (via report card/90 day action plans)
  - At or above goal
  - Recognize performance; retention strategies – start with WINS first
  - Below Goal (Deep dive into 90 day plan - this is where you spend most of your time)
  - Are you recording results in your 90 day plan?
  - What actions in your 90 day plan are getting results?
  - What actions in your 90 plans are not getting results?

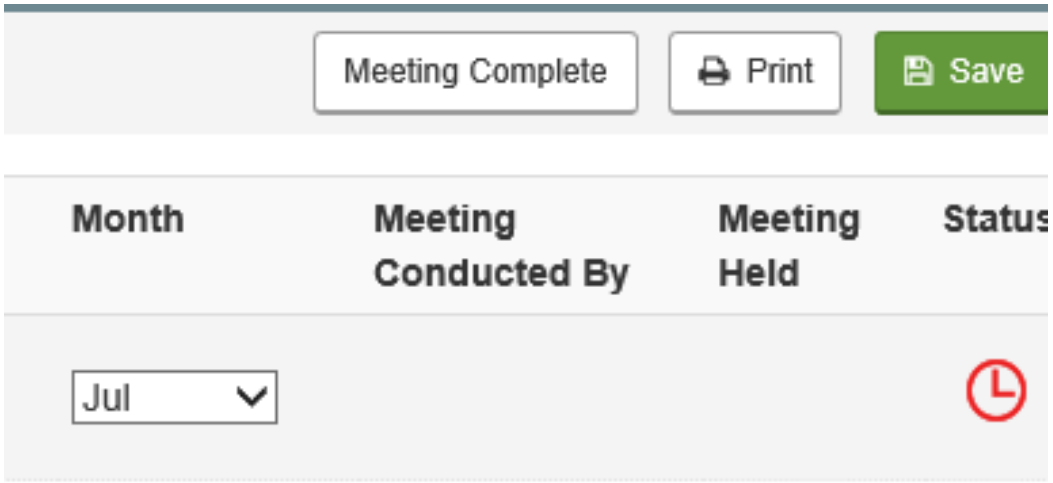
- What is keeping you awake at night.

Monthly Meeting: The Next Steps

- Let's be sure you understand the expectation.
- Let's review the timeline and deliverables.
- If _____ is not delivered/accomplished, our next steps will be _____.
- What questions do you have?
- In order for you to implement this 90 day plan, how can I help you?
- If you look forward and feel you won't be successful, what barriers do you see in implementing this plan?
- End with asking: What can I do to help support you on our LOM Journey?

Monthly Meeting Validation





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Standardized Agenda -

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Date_____Leader_____

	Living Our Mission **Monthly Meeting**	**Action Items/Due Date**
Rounding	• Check-in • Personal connection • What's working well	
Employee Engagement	• **Employee Survey Results/progress** • Is there anyone I need to recognize? • 90 day action plan • Review turnover • Review exit interview forms/trends • Pulse survey results	
Physician Satisfaction	• **Physician Survey results/progress** • 90 day action plan	
Quality	• **Quality Goals/results/progress** • 90 day action plan	
Patient Experience	• **Patient Experience Results/progress** • 90 day action plan	
Safety	• **Safety Goals/results/progress** • 90 day action plan	
Finance	• **Finance Goals/results/progress** • 90 day action plan	
Rounding	• Do you have the tools, equipment, and resources you need? • What is keeping you up at night? • Any tough questions we haven't discussed yet?	

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Seeing is Believing!

Helpful:	Suggestions:
Excited:	Questions:

Let's practice…

Time: 15 minutes

Pair up - closest birthday is the supervising leader
Using the monthly meeting model agenda – conduct a mock meeting using your LEM scorecard and your 90 day plan.

Tips:

- Keep rounding brief!
- Recognize the areas of the report card that are green! ☺
- Focus on the areas of the report card that are yellow / red…do the actions in the plan look like they will move the results forward?
- Don't forget – who is on point for what over the next 30 days?

Linkage grid:

- Continue to **explore in the Leader Evaluation Manager®** to get familiar with navigation. Share with your leader any challenges you are experiencing with the tool. (Due Date: Ongoing)
- All leaders to **enter 90 day action plans** into the LEM tool. Assure a 90 day expected goal achievement is documented and 2-3 key tactics are provided for each goal to facilitate achievement. (Due Date: 9/30/2016 & Ongoing)
- In preparation for your one up leader monthly meeting, **populate the validation matrix** with requested information. (Due Date: 9/30/2016 & Ongoing)
- All leaders to **review meeting model template** for talking points in preparation for first monthly meeting using new agenda (to be sent post LDI) (Due Date: 9/30/2016 & Ongoing)

Because "I love you"!

If you are not documenting performance, or having tough conversations, you are not living the values of your organization!

-Quint Studer

Thank you!

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