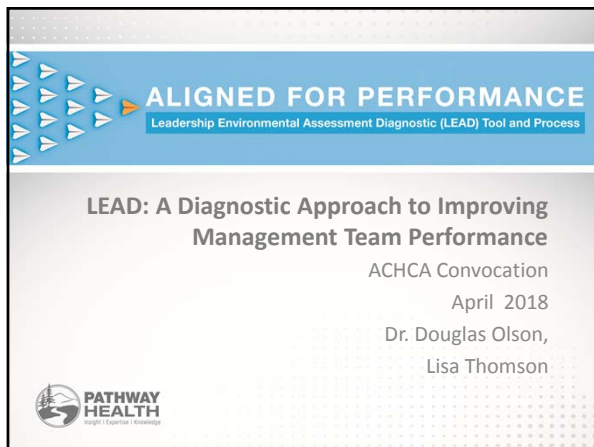


Disclosure of Commercial Interests Insight | Expertise | Knowledge

We consult for the following organization:
Pathway Health

Lisa Thomson, Chief Strategy and Marketing Officer
Doug Olsen, Senior Advisor


Pathway Health is a professional management and consulting organization serving clients in the long-term and post-acute care industry.



ALIGNED FOR PERFORMANCE
Leadership Environmental Assessment Diagnostic (LEAD) Tool and Process

LEAD: A Diagnostic Approach to Improving Management Team Performance

ACHCA Convocation
April 2018
Dr. Douglas Olson,
Lisa Thomson



Session objectives Insight | Expertise | Knowledge

- Learn about field tested fundamental leadership practices for older adult services organizations.
- Explore proactive leadership approaches to achieve greater success and their impact on management team performance.
- Gain an awareness of the diagnostic tool and resources available to make changes.

Overview Insight | Expertise | Knowledge

- **The Organizational Leadership Assessment tool and approach will:**
 - Help senior service leaders assess and work with the fundamental leadership areas they can improve within their management team environment in an efficient and timely way.
- **The framework we are using is:**
 - A fundamental leadership practices approach to measure organizational leadership areas with some type of intentional follow-up built into the process.

Framework Insight | Expertise | Knowledge

- The framework for the approach
 - Neuroscience of Leadership
 - Self-Discovery
 - Trusting Environment
 - Good rapport
 - Transparency
 - Practice, Practice, Practice ...
 - Leaders need to have high performing, supportive, talented management teams to prosper and thrive today

Who? Insight | Expertise | Knowledge

- Leadership and management team; not all staff. *They are a critical group to invest in.*
- This is the group that has the most knowledge about these areas. *They also crave education and development.*
- They will also be the most open to change when it is built on self-discovery. *They need to buy-in and own it.*
- We are also being careful about how often we ask people to participate in assessment. *They are busy and appreciate an efficient process with action.*

Leadership & Leadership Team Theory Insight | Expertise | Knowledge

- Leadership Practices Index – Kouzes and Kosner
- The Baldrige Program - National Institute of Standards and Technology (NIST).
- Leadership Environmental Assessment Diagnostic - Olson
- “Break All the Rules” – Buckingham
 - Culture is key
 - Assessment of management team
- “Good to Great” – Collins
 - Getting the right people on the bus
 - Culture is critical

Why this Organizational Leadership Tool? Insight | Expertise | Knowledge

- **We will help Elder Service Leaders:**
 - Move from crisis management to a **proactive** leadership environment.
Critically important in today’s environment
 - Give them resources and tools they can apply today—to **perform better** and be successful.
They impact staff and ultimately care and service
 - Foster the **excitement and enthusiasm** of their management teams.
You want to motivate and keep a good team in place

How? Insight | Expertise | Knowledge

This one-of-a-kind approach has 3 unique elements:

- 1) Only assessment focused on senior service management teams.
- 2) Efficient and flexible approach designed to fit the demands of the workplace and budget.
- 3) This will not be just another report, but will require their follow-up action and results.

Insight | Expertise | Knowledge

A Challenge: Leadership vs. Organizational Assessment?

Leadership Practices

Organizational Quality

Insight | Expertise | Knowledge

The Tool Today ...

Insight | Expertise | Knowledge

Reliability Scales

- *.88 Seeing the Future*
- *.91 Setting the Stage*
- *.90 Making it Happen*
- *.89 Evidence Based Decision-Making*
- *.93 Bringing People Along*
- *.86 Touching Hearts*
- *.76 Talent Development*
- *.65 A Balanced Set of Results*
- *1.0* The Ultimate Question*

A score of .80 or higher is considered strong for initial scale development . As always, multicollinearity could also be a factor, and will be tested with a larger sample.

Seeing the Future Insight | Expertise | Knowledge

- **Focused Visionary:** Setting the future agenda or purpose for the organization through identifying key priorities.
- Vision is a common element of all leadership models, e.g. Collins' Hedgehog concept and Kouzes and Posner Inspiring a Shared Vision.

*"We use an approach that collects all of the ideas of all leadership team members on their thoughts for the future for the organization – we then use all of the information assembled a key learning opportunity."
- Dr. Olson*

Seeing the Future Insight | Expertise | Knowledge

Alignment for the Future

Statement	Score
The leadership team sets the direction for our organization.	4.18
Our facility has energy for a focused vision.	4.18
Our management staff has a clear set of priorities.	4.36
The organization's mission makes me feel my job is important.	3.91

Setting the Stage Insight | Expertise | Knowledge

- **Supporting Change:** Encouraging organizational innovation and a readiness for change.

A —————> **B**

- Some form of change agent concept is a common element of all leadership models, e.g. Kotter's change model, Kouzes and Posner, and Gilster's Education focus. In this field, culture change is also a new norm.

"We use an approach of looking at internal and external obstacles for the group, which helps them better understand what they can change." Dr. Olson

Making it Happen Insight | Expertise | Knowledge

- **Strategic Management:** Developing and deploying strategic plans in the facility.

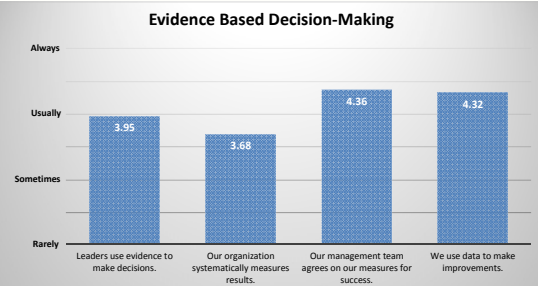
Alignment of Effort
This is very consistent with the Baldrige framework



Four Disciplines of Execution by the Coveys is a good resource for this area.

Evidence Based Decision-Making Insight | Expertise | Knowledge

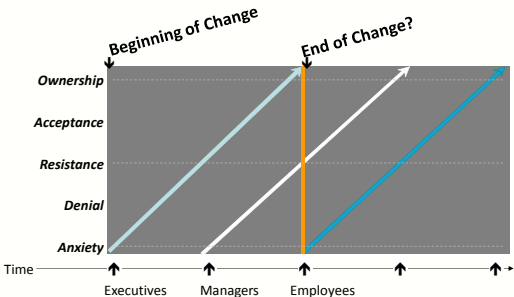
Understanding Quality Improvement: Using information with a systemic quality process to improve organizational performance.



Category	Score
Leaders use evidence to make decisions.	3.95
Our organization systematically measures results.	3.68
Our management team agrees on our measures for success.	4.36
We use data to make improvements.	4.32

Engaged Commitment: Bringing People Along Insight | Expertise | Knowledge

Empowering Communication: An engaging environment created by a climate of sharing information and involving staff in the facility.



The graph illustrates the stages of change: Ownership, Acceptance, Resistance, Denial, and Anxiety. The x-axis represents Time, with markers for Executives, Managers, and Employees. A vertical line indicates the 'End of Change?'.

Touching Hearts Insight | Expertise | Knowledge

- **Caring Presence:** Providing leadership support through visible behaviors and practices in the facility.
- Based on the high touch, personal nature of long-term care services, this area is advocated, which is consistent with MBWA, Greenleaf’s Servant leadership, and is also closely connected to Kouzes and Posner modeling behavior ideas.

How can management teams serve residents better? Caring, presence, rounding, appropriate staffing, empathy, modeling behavior and knowing names of people to note just a few characteristics mentioned by the leadership team.

Talent Development Insight | Expertise | Knowledge

- **Talent Development (Building Personal Capacity):** Encouraging and supporting the individual and personal growth of the leadership team.
- Leadership training for management staff:
 - Priority
 - Secondary

Need for a defined leadership team education plan that we can circle back to based on their comments and input and the organization’s goals.

Value of Partnerships Insight | Expertise | Knowledge

Community Collaboration

Category	Score
Our management team is open to working with other providers.	4.45
Our leadership partners with complementary services.	4.55
We value collaboration with others for providing care and service.	4.64
Our organization is perceived as a valued community partner.	4.45

A Balanced Set of Results Insight | Expertise | Knowledge

- **Management Responsibility:** Ensuring management team awareness of the overall performance of the organization.
- Consider the performance in a balanced set of outcome areas, as well as the overall performance of the organization.

Financial, customer satisfaction, employees time and talents, and defined business goals

The Ultimate Questions Insight | Expertise | Knowledge

Overall Perception

Question	Score
How often would you describe that you are satisfied with your job?	4.09
Would you recommend this organization as a good place to work?	4.00
Would you recommend your supervisor as someone to work for?	4.36
Would you recommend your management team as a group to work for?	4.73

Additional Comments Insight | Expertise | Knowledge

- Focus on specific initiatives
 - System initiatives
 - Campus changes
 - HR programs
 - Other
- How to optimize their team
- Other suggestions for improvement.
- Other information

Overall Profile & Perspectives Insight | Expertise | Knowledge

Profile

Category	Score (Relative)
Overall Perception	4.5
A Balanced Set of...	4.0
Collaboration in...	5.5
Talent...	3.5
Caring Hearts	5.0
Engaged...	5.5
Evidence Based...	4.0
Strategic Execution	4.5
Change Readiness	4.5
Alignment for the...	4.5

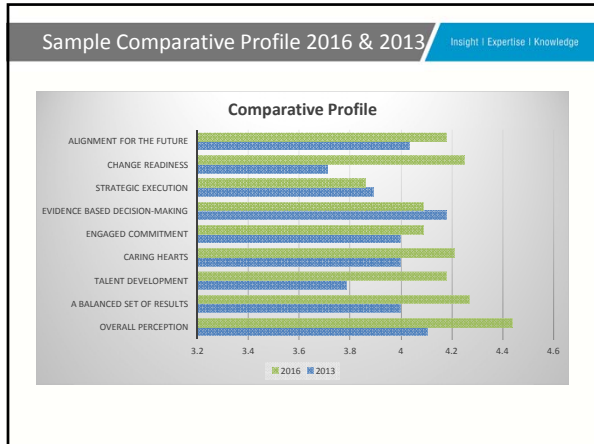
- Overall
- Strengths
- Areas of Refinement
- Context
- Their insights
 - Leadership
 - Organization
 - Other

Approach with Debriefing Insight | Expertise | Knowledge

- Focus on profile, including strengths and improvement opportunities
- Consider all the information, along with any other relevant information
 - Profiles, item analysis, narrative
 - Satisfaction surveys, other information
- Stay focused on the main messages found within the data representing their views
 - Don't try too read too much into the data
- Decide on only a 1-2 key actions/strategies to get results

Multi-site approaches Insight | Expertise | Knowledge

- Launched at a corporate management meeting
- Each site had their own plan
 - Each site receives their own report and is encouraged to:
 - emphasize perceived strengths
 - select at least one or two areas for growth
 - Open ended questions and comments
 - Use strategy question as a tool for enhancing alignment
 - Use training question to help craft an educational agenda
 - Other management suggestions collected
- An aggregate and/or regional profile and summary is provided





- Basic Action & Follow-up Ideas** Insight | Expertise | Knowledge
- Review and share group information
 - Solidify accuracy & perceptions
 - Come to some consensus
 - Focus
 - Reasonable plans: 2–3 ideas
 - Next steps
 - Accountability
 - Follow-up
 - Satisfaction with LEAD assessment and process
 - Other questions or thoughts

Some Examples of Common Actions Insight | Expertise | Knowledge

- Leverage strengths of the team, which is both fun and exciting
- Create strong management alignment for focus & direction
- Strengthen strategic execution with a process/project activity
- Learn about good decision making, e.g., lead and lag measures
- Talent development (interest in staff recruitment and retention) – encouraging sharing high impact programs, e.g. creative recruiting ideas, staff on-boarding or mentoring programs
- Develop a simple educational plan for the management group
- Identification of an emerging leader, and provide them with an opportunity and support
- In this day and age of increasing need to network with services put stronger team plan in place for community collaboration

The stage is set for all of this and more.....

Next Steps: Insight | Expertise | Knowledge

- Validate the Community Collaboration scale
- Expanded use of the tool and resources
- Report field wide trends and opportunities
- Integration with other product and service offerings
- Consider other relationships

Conclusion and Contact Information Insight | Expertise | Knowledge

- Moving from a crisis driven or solid performing team to a highly proactive, well aligned leadership position of strength and success.
- Health and aging services needs effective leadership and strong management now!
- We believe this is one of the new right approaches for advancing the excellence of administrators and their leadership teams!
- Contact information

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