

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

LEAD: An Overall Approach to Improving Your Management Team

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Dr. Douglas Olson,
Lisa Thomson
Dan Carr

PATHWAY HEALTH
Insight | Expertise | Knowledge

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Session objectives Insight | Expertise | Knowledge

- Part I.
 - Learn about field tested fundamental leadership practices for aging services organizations.
 - Briefly explore proactive leadership approaches to achieve greater success for the management team.
 - Gain an awareness of the diagnostic tool and resources available to make changes.
- Part II
 - Learn about an overall management education approach.
 - Highlight an innovative emerging leadership development program.

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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.

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Framework and Key Factors Insight | Expertise | Knowledge

- Who is involved?
- What is the Leadership Team theory
- Why use this tool?
- How is this done for a community?

A Venn diagram with two overlapping circles. The left circle is grey and labeled 'Leadership Practices'. The right circle is blue and labeled 'Organizational Quality'. The overlapping area in the center is a darker shade of blue.

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The Tool Today ... Insight | Expertise | Knowledge

A circular process diagram with a central box labeled 'A Balanced Set of Results'. The box contains 'Community Collaboration' above the main title. Six arrows point outwards from the center to the following steps: 'Seeing the Future', 'Setting the Stage', 'Making it Happen', 'Evidence Based Decision-Making', 'Bringing People Along', and 'Touching Hearts'. 'Talent Development' is also shown with an arrow pointing towards the center.

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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

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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

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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



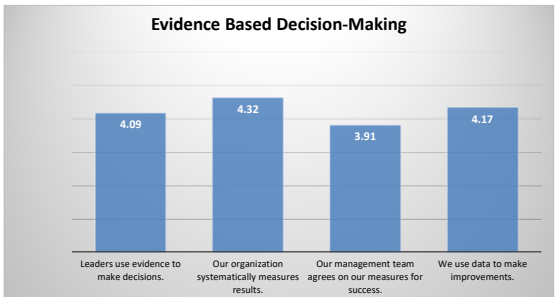
Four Disciplines of Execution by the Coveys is a good resource for this area.

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Evidence Based Decision-Making Insight | Expertise | Knowledge

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

Evidence Based Decision-Making



Category	Score
Leaders use evidence to make decisions.	4.09
Our organization systematically measures results.	4.32
Our management team agrees on our measures for success.	3.91
We use data to make improvements.	4.17

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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.

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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.

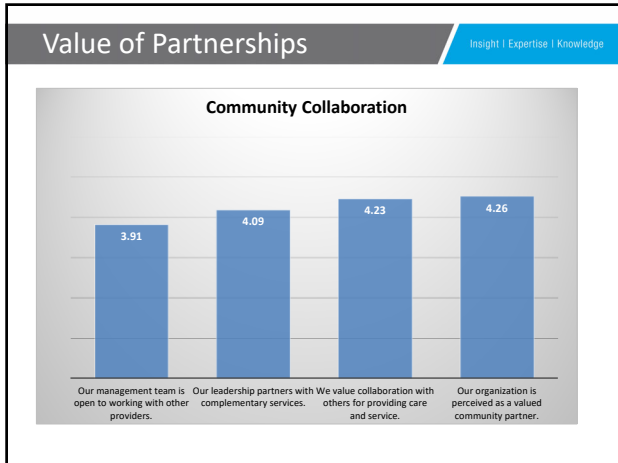
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Talent Development Insight | Expertise | Knowledge

- **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.
BHI project leveraged this area for their management group.

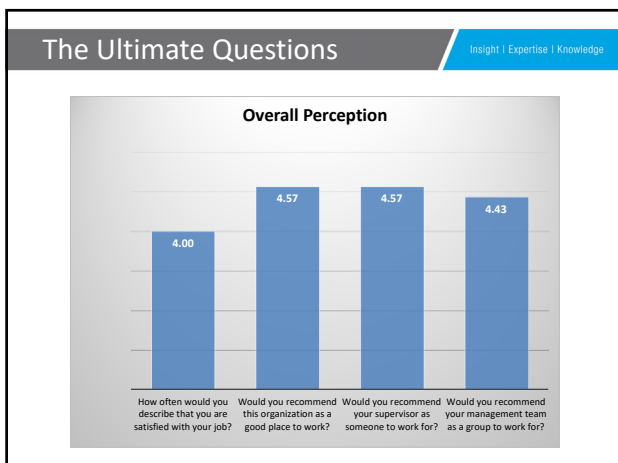
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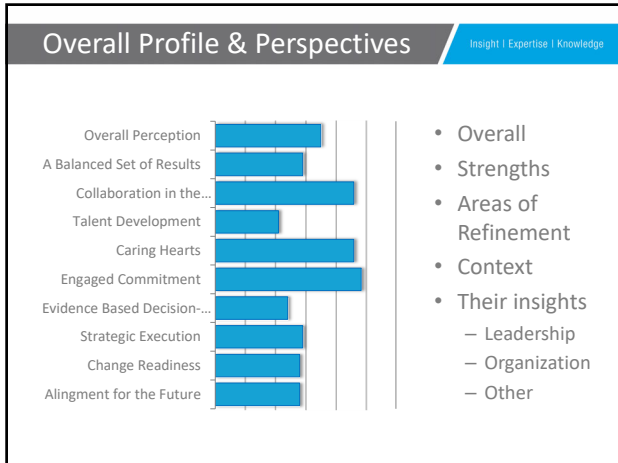
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- ### A Balanced Set of Results
- Insight | Expertise | Knowledge
- **Management Responsibility:** Ensuring management team awareness of the overall performance of the organization.
 - Consider the performance in a balanced set of outcome areas, as well as the overall performance of the organization.
 - *Financial, customer satisfaction, employees time and talents, and defined business goals*

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Approach with Debriefing

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- How to optimize their team
 - 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 to read too much into the data
- KISS - Decide on only a 1-2 key actions/strategies to get results

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Multi-site approaches

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- Launched at a corporate management meeting
- Each site had their own plan & debriefing
 - 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
 - Create reasonable plan, 1-3 ideas/actions
- An aggregate and/or regional profile and summary is provided

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- Corporate thoughts Insight | Expertise | Knowledge
- Talent development and a balanced perspective about organizational results.
 - Degree of alignment of corporate BHI goals and community specific goals
 - Investing in the management education program
 - Advance the BHI leadership development program over the next year

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Initial Phase II Insight | Expertise | Knowledge



- Feedback on management orientation checklist
- Management education program
 - Initial focus on Leadership, HR & communication
- BHI Leadership Fellows program

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Steps Insight | Expertise | Knowledge

- Discuss corporate/community
- Fall
 - Launch first two modules
 - Feedback – BHI leadership fellows
 - Launch BHI Leadership fellows
- Winter/Spring
 - Management education module
 - Ongoing refinement of first BHI Fellows class

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Leadership Development Program Insight | Expertise | Knowledge



- Combining sites
- Applied Learning
- Module Review
 - General/Organizational
 - Human Resources
 - Operational
 - Quality Systems
 - Financial
 - Professionalism

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BHI Leadership Fellows program Insight | Expertise | Knowledge



- Create formalized process for developing leaders
- Identify future leaders/administrators
- Create bench strength
- Retention of talent
- University relationships
- Internal/external promotion



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Program Elements

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- Self-assessment
- Regular leadership meetings
- Mentoring
- Leadership Projects
- External opportunities
- Tuition
- Advanced BHI specific development plan

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Next Steps:

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- Ongoing implementation of management education
 - Expanded use of the tool and resources
- Nurture and refine BHI Fellows program
- LEAD follow-up
 - Digital approach
 - Education resources

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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 these are some of the new right approaches for advancing the excellence of:
 - ❖ Administrators
 - ❖ Leadership teams, and
 - ❖ Emerging leaders

❖ Q & A

❖ Contact information
Doug Olson:

- ❖ University of Wisconsin – Eau Claire
- ❖ Senior Advisor, Pathway Health
- ❖ olsondou@uwec.edu

Lisa Thomson:

- ❖ Chief Marketing and Strategy Officer
- ❖ Lisa.Thomson@pathwayhealth.com

Dan Carr

- ❖ BHI
- ❖ Chief Operating Officer
- ❖ dcarr@bhiseniorliving.org
