

Annual Leader Plans

Lead. Achieve. Support.

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LEAD

LEAD

To continually strengthen and synergize leadership through adopting positive, proactive, results-orientated practices (aka, “the leadership bundle”)

9 Core Practices

LEADERSHIP BUNDLE



Strengthening Relationships



Promoting Wellbeing



Improving Communication



Effective Hiring & Onboarding



Leading Change



Elevating Gratitude



Giving & Receiving Feedback



Achieving Standards



Setting & Achieving Goals



ACHIEVE

ACHIEVE

To lead an engaged workforce in succeeding with improvements/goals specific to your department's unique aligned opportunities & priorities.

Goal Cycle

PRE-CYCLE

Strategic Plan Updates
Organizational, Departmental, & Team Goals
1st Quarter Goals & Action Plans
Budgets



Leadership
Training

QTR 1

Employee
Training

Activity to Accomplish Action Plans
Measure and Transparently Report
Develop next Quarter Goals & Action Plans
Monthly Accountability Meetings

Celebrations!

Leadership
Training

QTR 2

Activity to Accomplish Action Plans
Measure and Transparently Report
Develop next Quarter Goals & Action Plans
Monthly Accountability Meetings

Celebrations!

Mid-Year
Conversations

Leadership
Training

QTR 3

Employee
Training

Activity to Accomplish Action Plans
Measure and Transparently Report
Develop next Quarter Goals & Action Plans
Monthly Accountability Meetings

Celebrations!

Leadership
Training

QTR 4

Activity to Accomplish Action Plans
Measure and Transparently Report
Develop next Quarter Goals & Action Plans
Monthly Accountability Meetings

Celebrations!

POST-CYCLE

Post Mortem Reviews

Celebrations!

Annual
Evaluations

**Leading
Change**

**Setting &
Achieving High
Standards**

SUPPORT

SUPPORT

To support the local use (adoption) of the solutions & participation in activities/events brought forward by the initiative teams related to organization-wide improvement efforts.

Change Challenges

“GRAB THE BATON” →
PERSONALIZE AND LOCALIZE
THE ORGANIZATION-WIDE CHANGES

TRANSFER OF CHANGES

Innovation/Improvement

STRUCTURE:

- Employee-Engaged Teams
- Project & Process Improvement Teams
- Councils/Committees

Set the Aim/Goal
Assess Current State
Design Future State
• Plan Actions to Get There

Plan

Continual Improvement
• Adjust
• Refresh
• Diffusion

Adjust

Operations

STRUCTURE:

- Hierarchy - Organizational Chart
- Staffing Model
- Local Level Team (s)

• Go Live
• Keeping it Alive

Do

Direct Dialogue
• Compliment
• Call-Out
• Coach/Correct

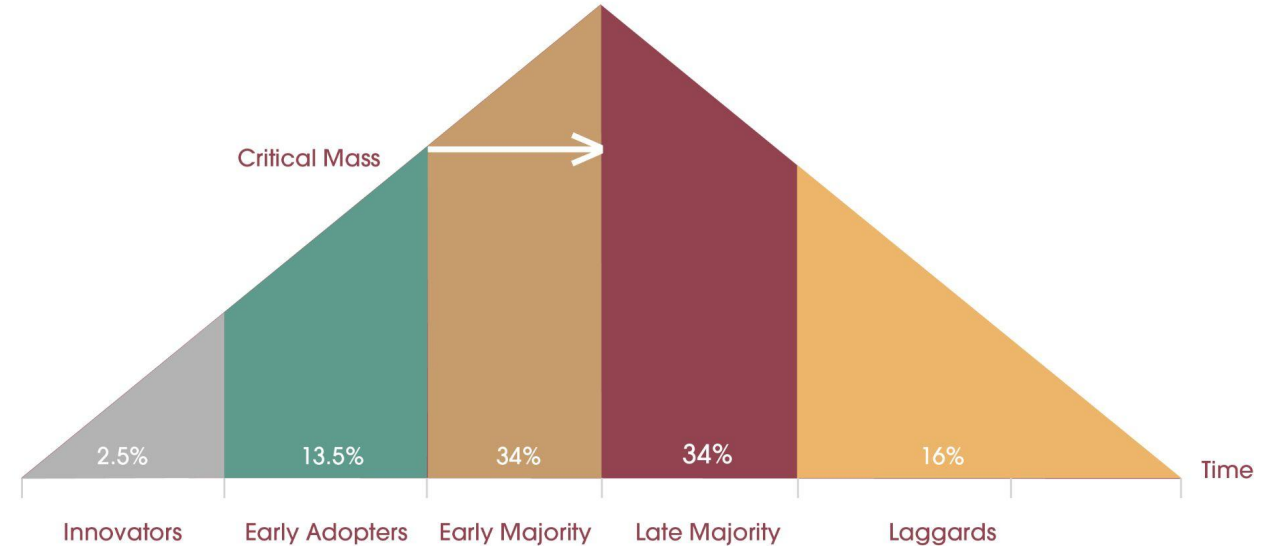
Validation
• Data
• Validation Rounding
• Competency Evaluation
• Employee Rounding

Study

Change Challenges

ADOPTION & DIFFUSION →
PERSONALIZE AND LOCALIZE
THE ORGANIZATION-WIDE CHANGES

DIFFUSION OF INNOVATION



ADOPTER CATEGORIES

Quarterly Action Plan – Steering Team

Purpose: In alignment with your strategic plan, organize and champion the Journey to Excellence improvement efforts by empowering and supporting the employee-driven teams and developing the organization-wide leadership efforts.

ALL Quarters:

- Monitor/Report on Y-T-D results for Organization Goals – oversight process whereby quarterly action plans are developed/updated for all organization and department goals and that scorecards are kept up to date/transparent regarding goal measurements; Celebrate progress/achievements throughout the year.
- Each quarter: Pick 1-2 of the following leadership absolutes to refresh/re-inspire/elevate
- In applicable quarters, oversight the completion of Performance Evaluations and Mid-Year Conversations
- In applicable quarters, support the Employee Experience Team in planning for and promoting high participation in the Employee Survey; and follow up with analyzing, communicating the results; and prioritizing the improvement efforts.

FY 1st Quarter

- Collaborate w/ sub-teams to devise the annual calendar: 4 Leadership Trainings, 4 Quarterly Staff Forums, 2 Employee Trainings
- Plan for and conduct Quarterly Leadership Training (including Road Map, evaluation, and a mini survey of leader satisfaction)
- Pick 1-2 of the leadership absolutes to refresh/re-inspire/elevate

FY 2nd Quarter

- Plan for and conduct Quarterly Leadership Training (including Road Map, evaluation, and a mini survey of leader satisfaction)
- Pick 1-2 of the leadership absolutes to refresh/re-inspire/elevate
- Lead the preparation for the Quarterly Leadership Training Teams “Checklist”

Quarterly Leadership Development – Agenda Recommendations

Standing Considerations for Quarterly Leadership Development Agenda Topics/Activities:

- CEO Update (YTD goal update and next quarter’s action plan. CEO introduces Road Map for the day’s learning).
- Journey Update – Snapshot of current happenings of each team (if not done in other settings with leaders)
- Recognition/Celebration/Appreciation
- Team Building activity
- Resiliency Topic, Balance Home and Work, Avoid Burnout
- Goal Setting (in the quarter prior to the start of the FY/goal cycle)

1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
<ul style="list-style-type: none"> • Any initiatives being rolled out by the teams that require leadership training? • Any past initiatives needing refreshing/reinspiring? • Pick 1-2 topics from learning priorities list • Pick 1-2 topics related to succeeding with organization goals 	<ul style="list-style-type: none"> • Any initiatives being rolled out by the teams that require leadership training? • Any past initiatives needing refreshing/reinspiring? • Pick 1-2 topics from learning priorities list • Pick 1-2 topics related to succeeding with organization goals 	<ul style="list-style-type: none"> • Any initiatives being rolled out by the teams that require leadership training? • Any past initiatives needing refreshing/reinspiring? • Pick 1-2 topics from learning priorities list • Pick 1-2 topics related to succeeding with organization goals 	<ul style="list-style-type: none"> • Any initiatives being rolled out by the teams that require leadership training? • Any past initiatives needing refreshing/reinspiring? • Pick 1-2 topics from learning priorities list • Pick 1-2 topics related to succeeding with organization goals

Quarterly Action Plans – Employee Experience Team

Your Purpose: Develops and helps implement solutions to create a more engaged and satisfied workforce and to increase the organization's ability to recruit and retain talented employees.

ALL Quarters:

- In applicable quarters, contribute to the Employee Training Events.
- In applicable quarters, plan for and promote high participation in the Employee Survey; and follow up with analyzing, communicating the results; and prioritizing the improvement efforts

FY 1st Quarter

- Plan/Conduct/Evaluate Quarterly Employee Forums (collaborate with CEO on Agenda Topics; track/report dept. attendance-develop a method to track by department, evaluate each one).
- Conduct a mini-employee survey related to the employee satisfaction goal and priorities to be conducted at Quarterly Employee Forums. Are you trending to meet your goal and make improvements? How do plans need to be adjusted?

Consider 1-2 of the following for this quarter's action plan:

- Develop and implement an action plan to make one improvement based on the employee survey.
- Keep behavior standards Alive (select a standard or small group of standards – prioritize standards that have the most opportunity for improvement)

FY 2nd Quarter

- Conduct an a What can be
- Prepare for, a
- Plan/Conduct with CEO on attendance-de each one).
- Conduct a mi satisfaction g Employee Fo improvements

- Consider 1-2 of**
- Develop and based on the
 - Keep behavior of standards - for improvem

Quarterly Action Plan – Patient Experience Team

Your Purpose: To develop the workforce and the organization systems and culture to achieve high levels of satisfaction and loyalty of patients and family/visitors.

ALL QUARTERS:

- SERVICE-related Behavioral Standard &/or Positive Communication Standard - Campaign or Train in a fun, new way.
- Monitor Service Recovery program and toolkits; submit areas of concern to de
- Quarterly review of Press Ganey survey results (quarter-to-date and year-to-da opportunities to celebrate/recognize; As well, get summary findings from leade
- In applicable quarters, develop your contributions to the Employee Training Ev
- When you put an initiative/improvement in place, go back and "Study-Adjust" ir

FY 1st Quarter

- Continue your efforts to refresh/re-inspire/elevate the behavior standards (e.g., create heightened awareness) related to Service Excellence.
- Continue your efforts to refresh/re-inspire/elevate one Positive Communication (e.g., create heightened awareness) this quarter.
- Pick a priority improvement opportunity identified from the patient satisfaction surveys and create/implement a plan.
- Study-Adjust a past service improvement initiative.

FY 2nd Quarter

- Continue your behavior stand related to Ser
- Continue your Positive Com awareness) th
- Pick a priority patient satisf
- Study-Adjust a
- Prepare for, a Meeting

Quarterly Action Plan – Employee Training

Your Purpose: To organize training programs that bring high quality training to employees related to the strategic initiatives of the organization. To support the journey teams with the training support needed to accomplish their purposes and plans.

FY 1st Quarter

- Promote & Conduct Employee Training.
- Evaluate Employee Training; share applicable evaluation information with Steering Team and sub-teams
- Provide leaders with attendance information.

FY 3rd Quarter

- Promote & Conduct Employee Training.
- Evaluate Employee Training; share applicable evaluation information with Steering Team and sub-teams
- Provide leaders with attendance information

FY 2nd Quarter

- Is there any training content from the last Employee Training that needs to be incorporated into New Hire Orientation? Make necessary updates.
- Are there other training tactics you can use to keep the learning "alive" from past Employee Trainings (building on, supplementing, reminding).
- Coordinate with other sub-teams to plan the next Employee Training.
- Prepare for, and attend, the Mid-Year All Teams Check-In Meeting.
- In collaboration with the Steering Team, develop next year's Employee Training Schedule

FY 4th Quarter

- Is there any training content from the last Employee Training that needs to be incorporated into New Hire Orientation? Make necessary updates.
- Are there other training tactics you can use to keep the learning "alive" from past Employee Trainings (building on, supplementing, reminding).
- Coordinate with other sub-teams to plan the next Employee Training.
- Prepare for, and attend, the All Teams Planning Workshop. Evaluate the team's efforts in the past year. Create a quarterly action plan for next year. Evaluate the team's membership and leadership – any changes to team composition?

Leadership Responsibilities Checklist & Self-Evaluation

Department Leader's Name: _____ Date: _____

DAILY	Y/ N	Comments
Safety Huddle		
Department Huddle		
Direct Dialogue (compliment, coach)		
Patient Rounding (by patient care managers)		
Revenue/Usage report reviewed		
WEEKLY		
Review HCAHPS/CAHPS scores		
BI-WEEKLY		
Ormed Payroll		
MONTHLY		
Rounding (Employee, Patient, Inter dept., Physician)		
Departmental Staff Meeting (start at Communication Board)		
Monthly Accountability Meeting with leader's Manager		
Quality Dashboard updated by the 15 th of each month, include Action Plans		
Budget Variance Report to Department Director		
Update Departmental Communication Board		
Attend Administrative Council Meeting		
Send Thank You Note to employee(s) home address		
Department Scheduling		
QUARTERLY		
Attendance at RWHC Roundtable meeting, if applicable		
Leadership Training Attendance		
Schedule employee attendance at Employee Forums		
BI-ANNUALLY		
Charting a New Course/Capstone training		
Performance Reviews (30-60-90 for new hires when due)		
- Mid-Year		
- Year End - to include staff SMART goal development		
ANNUALLY		
Fiscal Year Budget – Per Budget Schedule Capital/Operational		
Attend / Distribute Employee Service Awards		
Participate in Hospital Week/Nurses Week Celebration Activities		
Annual Employee Engagement Survey Promotion		
Annual Mandatory Inservices/Education		
Participation in One Community Board or Major Event		
PRN		
Forward Thank You Note suggestion to CEO		
Participation in RCMH Community Event(s)		

Monthly Accountability Meeting Agenda

Bring to the meeting:

- Leadership Training Road Map
- Goal 90-Day Action Plans and PDSA(s)
- Financial Operational Assessment
- Leadership Responsibilities Checklist

1. Goal Status/Action Plans

a. Organizational Goals

b. Department Goal Status/Actions (action plans & measurements)

2. Leadership Responsibilities Checklist & Learning Road Map

3. Behavior Standards Check In



The Richland Hospital, Inc. Leadership Absolutes Worksheet

Absolute	Why?	Guidelines
Employee Rounding	<ul style="list-style-type: none"> Employees are heard Ideas are encouraged for improving the employee experience Relationships/trust are built Barriers are removed 	<ul style="list-style-type: none"> Quarterly at Minimum Standardized Format <ul style="list-style-type: none"> Wins/Successes <ul style="list-style-type: none"> What support, tools do you need, what barriers are you encountering? Who can I recognize? Flight Crew developed question. Manager developed unit based question Employee to sign summary. Mid-year rounding form to also include check-in on goals and how the leader can help employees.
Patient Rounding	An opportunity for leaders to make a personal connection with their patients and to build trust. Patient rounding allows leaders to hear opportunities for improvement, do service recovery and to validate and/or celebrate how their team is doing	<ul style="list-style-type: none"> Inpatient beds: 100% of patients M-F will be rounded on by the Unit Manager or by someone doing Focused Rounding Outpatient units: Dedicated rounding daily as appropriate to your patient population. Focused patient rounding in non-primary dept (i.e. pharmacy rounding on inpt): Define with Senior Leader Documentation: Bring patient rounding log to Accountability meetings Guidelines: <ul style="list-style-type: none"> Introduce self as Manager/Director Thank patient for trusting us with their care Ask a focused question related to care you are validating Ask patient/family if they want to do a shout out/recognition Complete Service Recovery
Leadership Accountability Meeting	To ensure actions are being taken in support of the strategic plan. To reinforce the message that "what gets measured gets improved" by discussing established	<ul style="list-style-type: none"> Monthly – scheduled – Prioritize commitment to prepare and attend Agenda: RH Leader Absolute Dashboard and a RH accountability template to include department / unit specific responsibilities. Preparation: Leader Absolute Dashboard and department specific accountability report should be

Annual Leader Plans

Annual Leader Plan

Purposes:

1. **(LEAD)** To continually strengthen and synergize leadership through adopting positive, proactive, results-orientated tactics (aka, "the leadership bundle" to strengthening relationships, give/receive feedback, improve communication, hire & onboarding effectively, elevate gratefulness, promote resilience/wellbeing, lead change, adopt standards and set & achieve goals).
2. **(ACHIEVE)** To lead an engaged workforce in succeeding with improvements/goals specific to your department's unique aligned opportunities & priorities.
3. **(SUPPORT)** To support the local use (adoption) of the solutions & participation in activities/events brought forward by the initiative teams related to organization-wide improvement efforts

QUARTER 1

LEAD

- If applicable, begin/continue the train-the-trainer course(s) in CapstoneEDU to prepare to serve as an internal champion for element(s) of the "leadership bundle"; collaborate with co-internal champion(s) and Steering Team as needed to fulfill this role
- Attend quarterly leadership training (TBD)
- Prepare for, attend, follow up (roadmap): leadership training(s)
- Prepare for, attend, follow up: Monthly Accountability Meetings
- Continue Daily Safety Huddles, Rounding (provide "burning questions" to Administration for Friday 5), Grateful Leadership, Validation (Patient) Rounding, Direct Dialogue, and Behavior Based Interviews/Peer Panel Interviews
- OTHER:
-

ACHIEVE

- Goal Cycle Activities appropriate to the goal cycle timeline per the oversight of the Steering Team & Goal Cycle internal champion(s)
 - o SPECIFIC ACTIONS:
- Utilize Visual Communication Boards and a Staff Meeting Model
- Honor Vital Time, Monthly Accountability Meetings

SUPPORT

- Promote attendance at Forums and/or Training Event
- If applicable, support your employees' participation in employee-driven teams
- OTHER:

FOR EACH QUARTER OF THE ANNUAL PLAN

LEAD

- ❑ If applicable, begin/continue the train-the-trainer course(s) in CapstoneEDU to prepare to serve as an internal champion for element(s) of the “leadership bundle”; collaborate with co-internal champion(s) and Steering Team as needed to fulfill this role
- ❑ Prepare for, attend, follow up (roadmap): leadership training(s): ***(INSERT FOCUSES/DATES - from your Leadership Development Plan)***
- ❑ Prepare for, attend, follow up: Monthly Accountability Meetings
- ❑ Continue Daily Safety Huddles, Rounding (provide “burning questions” to Administration for Friday 5), Grateful Leadership, Validation (Patient) Rounding, Informal Direct Dialogue, and Behavior Based Interviews/Peer Panel Interviews ***(Update with YOUR CURRENT LEADERSHIP BUNDLE TACTICS, from your Leadership Responsibilities Checklist/Etc. - or simply reference this document)***
- ❑ OTHER: ***(INSERT WHAT IS NEW/CHANGING, OR TIME SENSITIVE, WITH LEADERSHIP PRACTICES, from your Steering Team Plan)***

EXAMPLE: Provide input to Steering Team, then Learn and Apply the revised Standard Work for Behavior Based Interviews/Peer Panel Interviews

EXAMPLE: Prepare and Deliver Mid-Year Coaching Conversations

FOR EACH QUARTER OF THE ANNUAL PLAN

ACHIEVE

- ❑ Goal Cycle Activities appropriate to the goal cycle timeline per the oversight of the Steering Team & Goal Cycle internal champion(s)
 - SPECIFIC ACTIONS:
 - EXAMPLE: Engage employees to set 3 draft department goals; once goals approved, engage employees to set first quarter mini-goal & action plan
- ❑ Update Visual Communication Boards on Metric Mondays
- ❑ Prepare & Hold Monthly Staff Meetings Using Standard Work Meeting Model
- ❑ Honor Vital Time (LIST ...)
- ❑ Prepare goal metrics/action plans for Monthly Accountability Meetings

FOR EACH QUARTER OF THE ANNUAL PLAN

SUPPORT

- Promote attendance at Quarterly Forums and/or Employee Training Event
- If applicable, support your employees' participation in employee-driven teams
- OTHER: (INSERT FROM TEAM PLANS)

EXAMPLES:

- Promote this quarter's **Word-of-Mouth Campaign** (Emp Train & Comm Team)
- "Grab the baton" for the selected monthly organization-wide focus on a value-based **behavior standard (Workforce Wellbeing) & Department Resilience Rituals and Routines** (Emp Exp Team)
- "Grab the baton" for the Positive Communication Standards of **Banned Words/Phrases** (Pt Exp Team)
- Validate your department's efforts with: **Telephone Etiquette & Hallway Hospitality** Standards (provide feedback to the Pt Exp Team) and **Peer-to-Peer Recognition Program/Process** (provide feedback to the Emp Exp Team)

Call to Action

- ❑ CUSTOMIZE AN ANNUAL LEADER PLAN (TEMPLATE PROVIDED ON PARTNER ONLY WEBSITE)
- ❑ WHEN →
Aligned with your annual team plans



Call to Action

- ❑ QUARTERLY SNAPSHOT/OVERVIEW
- ❑ WHEN → QUARTERLY LEADERSHIP TRAINING, &/or other standing leadership meeting

