



## CEO-Employee Forums

Solution

### What...

CEO-Employee Forums are “town hall”-type or “state-of-the-union”-type meetings hosted by the CEO (Administrator, Executive Director) as a way to communicate top-level information and updates directly to employees.

These forums provide a mechanism to communicate with as many employees as possible in a consistent, systematic, and purposeful way.



These forums are a great tactic for keeping the CEO connected with employees and to keep the employees connected to the healthcare organization’s mission, vision, goals and plans.

As well, rumors, confusion, and even fear & anxiety, can be reduced - and trust can be fostered.



*“I find that when you open the door toward openness and transparency, a lot of people will follow you through.”*

*- Kristen Gillibrand*



## How...

- ▶ It is recommended that the CEO and the Employee Experience Team co-own the creation of the agenda for the forums and that the CEO delivers the content at the forum(s).
- ▶ In preparation for a forum, the CEO can meet with the Employee Experience team to ask: What do employees want to hear about? What do they need clarified? A best practice is for the CEO to attend the Employee Experience Team meeting quarterly to have a 20-30-minute discussion on what the team feels would be best announced/discussed at the forums for the quarter. Employees on the team can prepare for the this forum planning meeting by asking their peers what topics or questions they have on their minds about the top-level happenings in the organizations.
- ▶ A common standing part of the forum agenda is often an update as to how the organization is progressing toward accomplishing annual goals and big projects and what is planned in the coming quarter to continue the progress. The “Voice of the CEO” is so impactful in providing emphasis to the direction and strategy of the organization. It is up to the CEO to ask for the support of his or her employee group and the forums are a great way to do just that.
- ▶ The forums are also a good time to celebrate progress and contributions of individuals and teams. Therefore, forums could start with recognition and/or a positive story. This recognition should be in alignment with your goals and/or Values/Standards of Behavior. The CEO (or their designee) can solicit recognition ideas from front-line leaders related to their progress toward attaining their annual department goals or the completion of a major project.
- ▶ Some teams decide to survey all employees for input on agenda topics. This may lead to “survey fatigue” in the organization. Given that the employees serving on the Employee Experience and/or Employee Communication & Training Team are a diverse group of representatives of all employees, they likely are “in the know” related to the hot topics or rumors in the workplace and their input will likely be sufficient to create an on-point agenda.



# How...

- ▶ Create your own branded name for the forums. Usually this is in keeping with the naming or branding of your transformational initiative. The agenda and any promotional messaging, signage and handouts can follow the theme. This helps to brand and market your forums. For instance, the Gundersen Boscobel Hospital and Clinics in Boscobel, Wisconsin named their initiative “REACH” after the rolling hills they are surrounded by. They have a hiking and climbing theme for their forums and the name is branded as “Base Camps.”
- ▶ Forums are recommended to be held on a quarterly basis. This is consistent with the organization’s goals and action plans so that the CEO can update all employees on the “state” of the organization. Be careful to not place the timing of these too close to semi-annual employee training events.
- ▶ Monthly CEO-forums have not proven to work well when testing in many organizations. It has been found that the attendance numbers dwindle as the news and status of top-level, long-term strategies, goals, and projects has not really changed all that much. Therefore, it is recommended that CEOs develop a brief monthly or weekly communication tactic (e.g., “Friday Five”) that support the relaying of important updates in between the quarterly the CEO-Employee Forums.
- ▶ The format may be in-person or virtual. Live is often preferred by employees, yet the information could be provided in a recorded message, especially in very large workplaces. If in-person, choose a place for the forums where the CEO can deliver his or her message very transparently without a lot of visitor or patient interruptions. On-site works best as it is convenient for employees to attend while working.
- ▶ Be sure to include employees that work at off-site locations or remotely. If your organization has several off-site locations or remote workers, make sure that technology is used to connect these employees on a quarterly basis. Some organizations created an annual plan so that each off-site location hosts an on-site forum at least once annually, if in-person forums are held.



- ▶ Depending on the number of employees, typically 4-6 forums held over a two-day period at various hours of day and night are effective to reach a large workforce with live in-person or live virtual events.
- ▶ Forums are usually limited to one hour of paid meeting time. Make sure the agenda is not too full for the CEO to cover. Leave time to field questions on each agenda topic. (PLAN: 45 minutes of covered topics, and 10 minutes of Q&A - this leaves 5 minutes for employees to get to disperse and gather).
- ▶ When offered in-person, the forums need to be “hosted” or “staffed” ... usually the Employee Training & Communication Team members or other employee volunteers assist the CEO in handing out an agenda, any handouts, and collecting evaluations and/or suggestions.
- ▶ While the Employee Training & Communication Team will promote attendance of the forum, it is important that the organization’s leaders are accountable for promoting employee attendance. Beginning with your very first forum, communicate an expectation of the attendance percentage by department. That departmental expectation is a minimum of 30%. When 30% or more of a social group returns happy and excited that they got great value from attending the forum, others will eventually see the benefit of attending the forums as well.
- ▶ After each forum, transparently report attendance by department to the leadership group. It is really up to leaders to role model and set the expectation that their employees attend the forum. It is a best practice for leaders to cover a department while their employees attend. If your departmental leadership meetings are effective, the leaders will already know the topics being discussed at the forums, and therefore have no reason to attend! Send employees!
- ▶ Make sure employees are sincerely thanked for coming. Employee attendance is vital for effective communication....it takes two - the speaker and the listener.
- ▶ Evaluate the forums. This may be as simple as an index card in which people write went well with the forums and on the other, what could be done to improve future forums.



- ▶ Consider using the evaluation form to also conduct a mini-employee satisfaction survey. This will aid your Employee Experience team in tracking changes in employee satisfaction in between scheduled annual surveys. Target the few questions on those topics that are being actively worked on to improve to monitor the impact of the efforts.
- ▶ Consider collecting employee input at forums. Have employees provide “bright ideas” or suggestions on a certain topic that might be challenging your organization (e.g., cost savings, patient satisfaction improvement, marketing, etc.). Your employees have answers - ask them... they are your front line, your community members and your chief marketing officers. For example: “You have heard that the healthcare organization needs to lower our expenses, what ideas do you have to help our financial position?” Have employees put their ideas in writing and place them in a suggestion box at the forum.
- ▶ Have healthy snacks - Role model wellness!
- ▶ Create “attendance stickers” that are given to employees when they arrive for the forums - the employees wear the attendance sticker to show others that they attended and to promote the attendance of others to the remaining forums in that series of quarterly forums ... this is a spin on tactics such as “I voted” or “I donated blood today” stickers.
- ▶ Consider having an attendance prize drawing to incentivize and recognize attendance.

**“A lack of transparency results in distrust and a deep sense of insecurity.”**

- Dalai Lama

