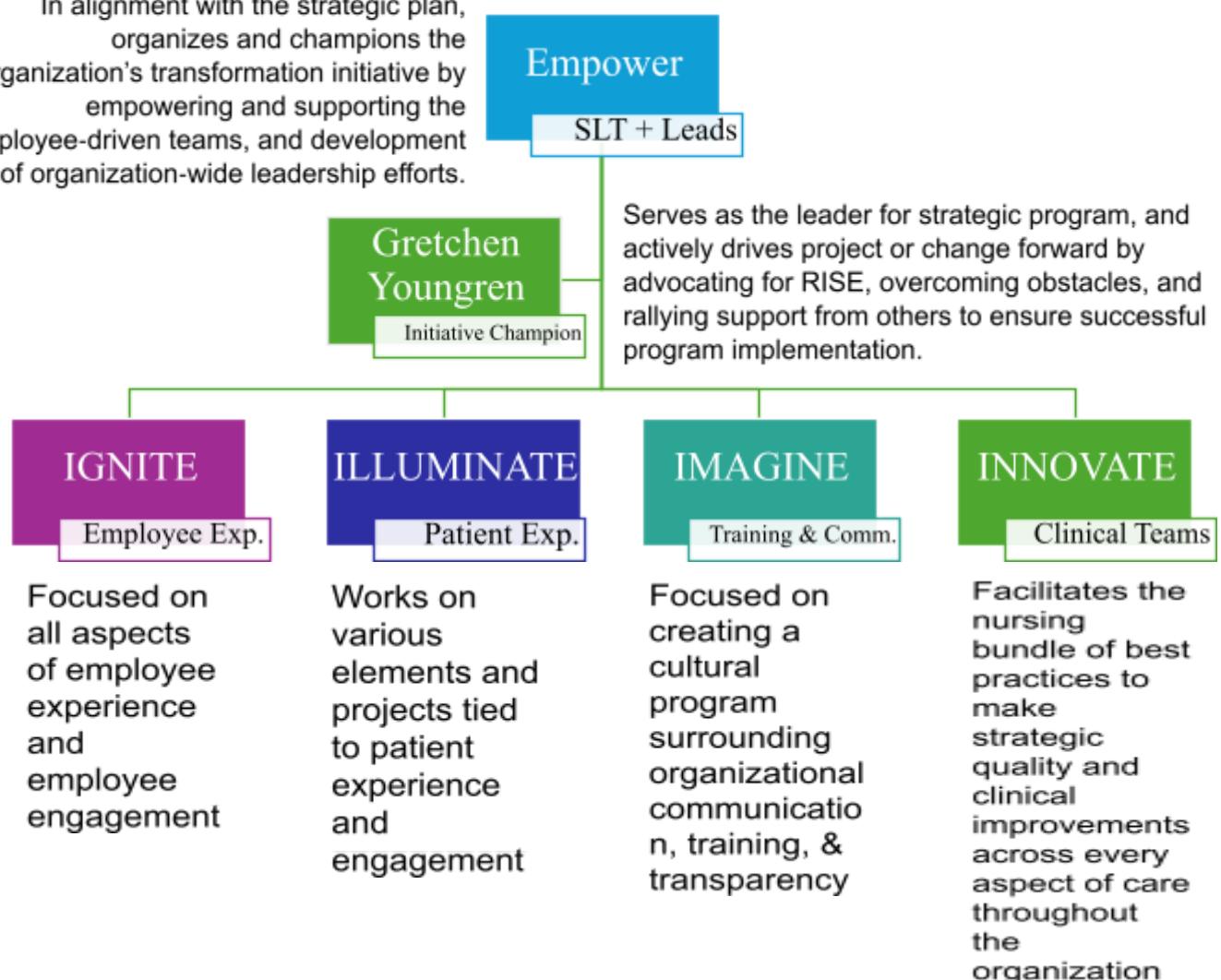




Welcome to the **RISE Toolkit**, a comprehensive resource designed to empower and support our shared commitment to a culture of leadership through RISE. This toolkit consolidates the tools, strategies, and resources we've developed to help every team member embrace and embody the core values and leadership strategies of our organization. By embracing the spirit of RISE tools and resources, we aim to create an environment where leadership thrives at every level, fostering collaboration, innovation, and growth. Whether you are a seasoned leader or taking your first steps in a leadership role, this workbook provides practical guidance and actionable insights to help you succeed and contribute meaningfully to our mission.

In alignment with the strategic plan, organizes and champions the organization's transformation initiative by empowering and supporting the employee-driven teams, and development of organization-wide leadership efforts.





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## Credo Card

Since November of 2021, we have been working to develop a cultural foundation rooted in safety, quality, operational excellence, and a drive to provide the best regional healthcare.

**RISE Purpose Statement:** *"We create an irresistible culture, we are known for how we treat people, we continuously evolve to be our best selves, and strive to deliver the best results."*

**What is a credo?** Latin word Credo means “I Believe”, or a statement of the beliefs or aims which guide someone’s actions. Defines not just who we are, but how we will live up to the promise of that definition through our daily commitments to defining what it means to be Samaritan. At Samaritan, our Credo is defined through 5 key elements: Credo statement, organizational values, 3 steps of service, family promise, and everything is rooted in our mission statement.

- **Samaritan Credo:** Samaritan is a place filled with genuine love and care for others. We pledge to deliver the finest personalized and compassionate care that fosters lasting connection. We extend a warm embrace to our community, inviting them to discover a haven where exceptional care awaits.
- **Samaritan Values:** Listen, Love, Respect, Excel, and Innovate
- **3 Steps of Service:**
  - o Greet each guest with the HEART of Samaritan & use their name when possible.



- o Listen, anticipate, and fulfill the needs of each guest.
- o Provide a loving farewell, and genuine thank you.
- **Samaritan Family Promise:** Our Samaritan family of select professionals is our foundation to providing the utmost care to our community. By embracing our values of listen, love, respect, excel, and innovate, we cultivate and empower our professional's talents for the betterment of each individual and the organization. We create an environment that encourages personal aspirations, wellness, equity, and diversity.

#### **Utilization and Expectations for the Credo Card:**

- It is to be worn as part of the daily uniform. Card folds and fits inside the name badge pocket.
- Should be physically taken out and referenced as part of the daily huddle cadence with your team:
  - o Monday – Credo review
  - o Tuesday – Values Review
  - o Wednesday – 3 Steps of Service
  - o Thursday – Samaritan Family Promise
  - o Friday – Samaritan Amazing Moments! Sharing stories and highlights from the week of Samaritan professionals that go above and beyond or do something notable in the spirit of living out the Samaritan Credo Card.

## **SIP (Strategic, Innovation, Planning) Time**

SIP is a strategic priority of designated time that allows for leaders to proactively invest time in activities that move our teams closer to organizational goal attainment. During this time, leaders will be taking steps to develop, act on, or evaluate the action plans for priority improvement initiatives and/or goals. Some examples of this include organizing staff training on an upcoming implementation or change, evaluating department data related to patient experience, finance, and quality, or setting up individual employee rounding meetings with staff.

SIP time also includes allotment for the daily department huddle, as well as the organizational daily leadership huddle:

- 8-8:30a – Daily Department Huddle



- 8:45a – Daily Leadership Huddle
- Tools available: SIP Overview Document "[S:\RISE\Capstone Resources + Tools\Virtual Time\Defining SIP Time\\_Handout.docx](S:\RISE\Capstone Resources + Tools\Virtual Time\Defining SIP Time_Handout.docx)"

To support this valued time throughout our organization, there should not be anything scheduled during this time (interviews, department meetings, etc.) unless previously agreed upon by participants or the need is communicated by leader asking for the meeting.

## Monthly Accountability Meetings as Director with Senior Leader

These are proactive monthly meetings scheduled/held between senior leaders and the directors/managers they supervise. They are typically 1:1 (e.g. CNO with ER Director) but could include assistant directors/manager if applicable (e.g. CNO with ER Director and Assistant Director). There is a set agenda that focuses around proactively discussing topics that “move the organization forward” such as the current status of goals/project as well as the leader’s compliance with the established leadership responsibilities such as rounding, etc. (versus discussions in response to the day-to-day whirlwind or this week’s crisis).

At Samaritan, monthly accountability meetings reflect conversations around your individual leadership efforts, as well as your team’s operational and strategic efforts in the pillars of people, safety, quality & operational excellence, finance, care delivery, and access.

- Solution: Monthly Accountability Meeting Template ("[S:\RISE\Capstone Resources + Tools\Virtual Time\Monthly Accountability Meetings\Monthly SLT Accountability Form\\_2022 Update.docx](S:\RISE\Capstone Resources + Tools\Virtual Time\Monthly Accountability Meetings\Monthly SLT Accountability Form_2022 Update.docx)")



# Rounding

**Employee Rounding:** Dedicated time that a Samaritan leader takes to talk (usually 1:1) with employees in their department or physicians. Emphasis on *relationship building* vs. conveying information. Purposeful conversation that focuses on positives as well as important aspects of work and patient care.

- Tools available: "<S:\RISE\Capstone Resources + Tools\Employee Rounding>"
  - Quarterly Rounding Questions distributed by internal rounding champions, Matt Davis & Alex Town
  - Stop Light Report: Stoplight reports can be used to track key developments from rounding sessions with your collective team of employees.

**Interdepartmental Rounding:** Dedicated time between leaders to gain wins and create bonds between employees and other departments. It is an opportunity to breakdown silos throughout increased communication, and collaboration efforts among teams. Interdepartmental rounding also supports improved quality, shared understanding of processes as well as shared learning of job functions within teams and departments.

- Tools available: "<S:\RISE\Capstone Resources + Tools\Work Relationships That Work\Interdepartmental Rounding Questions.pdf>"

**New Hire Rounding & Relationship Building:** Connecting early and often with new hires is crucial for retention. These efforts foster engagement, build trust, and helps our newest members of the Samaritan Family feel valued within the organization.

- Questions – Our new hire rounding questions focus specifically on follow-ups from the Make Day 1 Special experience. Please utilize these questions with your newest professional during a 1:1 rounding meeting within the first 60-90 days of hire.
- Questions can be found here:  
[http://portal.samaritanhealthcare.com/rise/\\_layouts/15/DocIdRedir.aspx?ID=C3FMYRHRA323-44548755-308](http://portal.samaritanhealthcare.com/rise/_layouts/15/DocIdRedir.aspx?ID=C3FMYRHRA323-44548755-308)

**MD1S Expectations** – On a new Samaritan Professional's first day, Samaritan Leadership is expected to connect with their new hire through the scheduled lunch session or through a morning meet & greet upon arrival to our organization. This touch base truly demonstrates our commitment to fostering our values and sense of family among our organization on day one.



# Leading Change

Changes for individuals and entire organizations are inevitable, normal, and necessary. Yet, experts on change reveal that most individuals – and groups of people – struggle with change. For Samaritan Healthcare to achieve ongoing progress and excellence, we as leaders are required to facilitate change well and be open to embracing new ideas. This is accomplished when change is approached as a collaborative and cooperative process where leaders engage professionals in crafting the changes that impact their work – *together*.

## What is meant by leading change?

- Refers to the process of planning and implementing a new solution or practice with the goal of achieving competency and consistency among a sufficient number of people to produce the desired result.
- Involves fostering agility. Which entails a proactive stance towards change, innovation, growth, and resilience in uncertain circumstances.
- Gets easier once you understand the common change challenges as you are better equipped to anticipate them, watch for them, and take appropriate action to avoid or minimize the negative impacts on your change efforts.

## 7 Challenges to Leading Change:

1. The Power and Distraction of the Whirlwind: The “whirlwind” is day-to-day operations – or the work it takes to maintain the current state. Some refer to it as “the real work” or “the day job.” It is often driven by urgency. It is often re-active. Whirlwind activities compete for time, attention, and energy necessary to move forward toward goals, improvements, and necessary changes that lead you to a better future state.
  - *Solution*: Creation and utilization of SIP time. Designated time spent on work that moves the organization forward and higher.
2. Variation In Individual Behavior, Performance, And Contributions: variation in how each individual in the organization behaves and performs, and contributes toward the change, goals, and/or improvement efforts.
  - *Solution*: Frequent feedback – formal and informal – from leaders, combined with informal feedback from peers, are the vital tactics for elevating behaviors, performance, and contributions.

3. **Inability To Diffuse the Innovation to The Critical Masses:** Successful and quick diffusion, or spread, of changes into the organization, depends on how successfully and quickly each individual adopts the change.
  - *Solution:* Utilization of Campaigns or ‘top of mind’ tactics with the partnership of Imagine (Training & Communication Team), Validation-feedback loop with peer-to-peer feedback or accountability, and ultimately KEEP. GOING. Remember, “in the early stages of change, negativity will scream at you and positivity will only whisper.”
4. **Inability To Transfer Changes into Operations:** Most changes are appropriately spearheaded by a team of people that represent all the people that will have to make the change (e.g., use the new technology, achieve the new standards, follow the new protocol, etc.). Once the team has done the work of planning the change, then the implementation or execution of that planned change requires “a transfer of that change” from that small team to everyone in day-to-day operations. That transfer, or handoff, from a conceptual idea, crafted in the minds of the team members, into the reality of integrating that into the current day-to-day operations change present challenges and be met with resistance. If that transfer does not go well, the change will not go well
  - *Solution:* After organization-wide changes are introduced through an organization-wide training and/or other activities, individual leaders can “localize” and “personalize” the meaning of these changes when they “grab the baton” in follow up by engaging employees in individual or group discussions at huddles, staff meeting, and/or during rounding sessions regarding how best to apply the standards in the specific department or job.
5. **The Weight of Baggage:** Baggage is often personal and can hold negative emotional reactions that an individual (or group of individuals) within the organization carry - sometimes for years – related to a past situation. Often, this baggage is used as their rationale for opting out of changes that are expected of all.
  - *Solution:* Organize efforts for individuals to contemplate if they have baggage and consider how they can put it down. Group activities can include identifying baggage and getting the opportunity to “let it go” symbolically (ex: shredding, burning, burying, launching, etc.)
6. **Dysfunction at the top of the Hierarchy:** While many changes take the efforts of everyone in the organization, what is specifically happening (or not happening) by those at the top of the organization’s hierarchy can foster or inhibit the efforts towards achieving the very changes that were defined there.

- **Solution:** Efforts by the senior leadership team to evaluate their team functioning (recommended semi-annually) and ongoingly take actions to monitor and improve their functioning.

7. **Organizational Change Fatigue:** A general sense of apathy or passive resignation towards organizational changes by individuals or teams.

- **Solutions:**
  - Gain a deeper understanding of humans and change and utilize this information as changes are being planned and implemented.
  - Proactively include efforts focused on increasing personal resiliency and wellbeing.
  - Communicate early and often with a simplistic and dependable approach. The unknown creates fear which adds to resistance and change fatigue.
  - Take an in-person approach, when possible, to meetings and trainings on changes. Human interaction is a key force in overcoming resistance and speed of change.

## Kotter's 8 Steps Change Model

with 3 groups: Definition, Implementation, Secure



*Additional Change Solutions:*



Below are some helpful tips provided by our internal change champions on how you can successfully guide your team through change:

- 3 Positive Things Ice Breaker: Have your team write down and share 3 positive things that have happened that week to help open their mind to positivity for the day.
- Director Reflection & Planning Form

## Communication

At Samaritan Healthcare, communication is the cornerstone of our success in delivering exceptional care and fostering a collaborative work environment. Open, clear, and consistent communication among our professionals ensures that we provide the highest quality of care to our patients while supporting one another in our shared mission. By actively listening, sharing knowledge, and working together, we build trust, enhance efficiency, and strengthen our team's ability to adapt and innovate. Organizational communication at Samaritan is supported through the following tools:

- **Communication Boards:** communication boards are located throughout the organization, preferably in each distinct work unit/department in which departmental goals are established. The communications are organized by Strategic Pillars in an effort to provide updates to employees in a balanced approach.
  - The RISE Communication Board template is located here: "[S:\RISE\Capstone Resources + Tools\Communication Boards\COMMUNICATION BOARDS\\_Outline.pdf](S:\RISE\Capstone Resources + Tools\Communication Boards\COMMUNICATION BOARDS_Outline.pdf)"
  - Your team's communication board should be updated weekly (min) to reflect organizational changes, information intended for our professionals, and any information related to upcoming events. Categories for information include:
    - Organizational Goals by Pillar: Pull this information from balanced scorecard
    - Department Goals and Activities: This area should speak to what your individual teams are doing to drive progress and goals in these areas. For example: what are your department or division goals/activities related to each pillar?
    - Education, News, Values, Sightings & More: This is a great spot to post the Take5, Rise & Shine, organizational event flyers, etc.



- **Take5:** Weekly flyer created by the Imagine team that highlights the “top 5 things you need to know” for the week ahead. This is distributed via email on Thursday’s and reflects news and activities related to the week head. Leaders may submit information relevant to the Take5 by emailing [imagine@samaritanhealthcare.com](mailto:imagine@samaritanhealthcare.com).
- **Rise & Shine Newsletter:** this monthly newsletter celebrates the teams and culture at Samaritan through professional spotlights, as well as celebrations related to awards and achievements across the organization.

## Goal Cycle Planning

The Goal Cycle Process should be rooted in 3 basic elements of the RISE Framework:

1. Grounded in quality improvement
2. A scheduled “cadence” of purposeful activities toward focused improvement
3. Defined languages/terms and tools

**Key considerations:** *Why develop a goal cycle?*

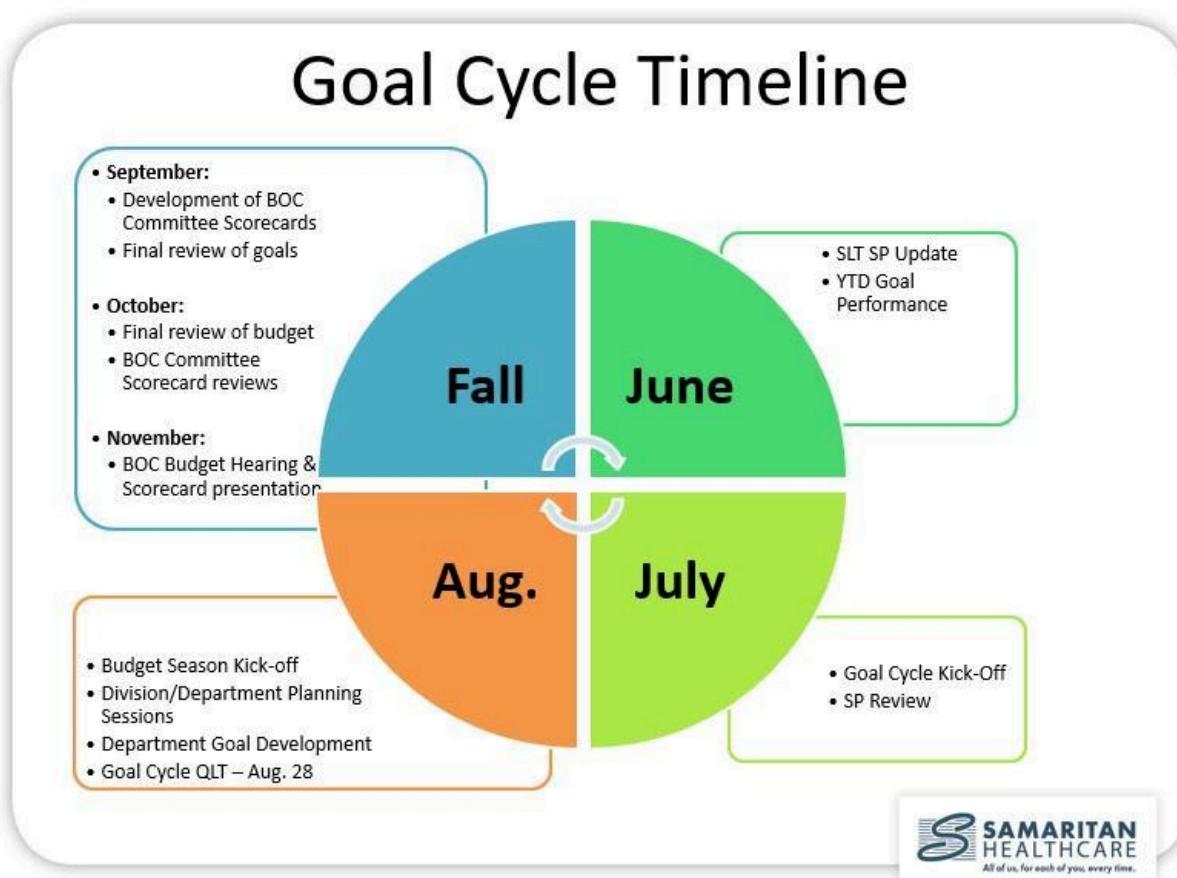
- When not focused on the right things, boards, leaders, and employees fill their time with the wrong thing (less important, lower-level tasks)
- Lack of focus and synergy – working against each other or in silos

**What resources should I use to pull together department goals with my team?**

- Review your most recent goal cycle documents! Celebrate your wins, and review where there are areas for continued improvement. This should be a time to reflect and truly celebrate all the work that went into this year’s accomplishments, as well as the contributions from all team members thus far!
- Dive into the updated strategic plan! Lean on your division partners to discuss what they are doing with their teams, and take advantage of time with your Senior Leader on the overall strategic plan. Are there projects happening among other teams that will impact your team’s work? Include these for discussion!

- Pull data from your department reports! What data is screaming at you for improvement in the realm of patient experience or employee engagement?
- Other data sources for goal cycle planning:
  - Press Ganey Feedback (both patient and employee)
  - Budget Trends & Feedback – Premiere & IDEA software
  - Rounding stoplight reports

Typical Goal Cycle Timeline:





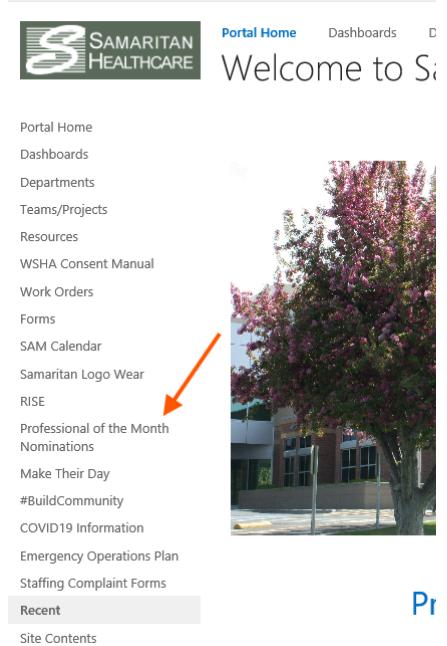
## Culture of Gratitude

At Samaritan Healthcare, we strive to create a culture where professionals want to work, providers want to practice and patients want to come. We achieve this through living out our values on a daily basis, and when the moment is right—taking the time to celebrate with our teams, and express gratitude for our fellow Samaritan Family members.

- **Importance of celebrating wins!** Don't wait until the end of the year when goals are met to celebrate, take time to recognize, appreciate, and celebrate the efforts and progress along the way. Breaking your annual goals down into mini-quarterly goals can help you keep momentum strong and allows for opportunities to celebrate progress. Maybe you aren't a "party planner" – but likely, you've got a "Chief Party Officer" on your team that would love an opportunity to plan a celebration.
- **Thank You Notes:** Leaders are expected to take the time to send 5 thank you notes per month, specifically taking the opportunity to celebrate a professional that has gone above and beyond to live our values or Samaritan Credo. These cards are mailed to the professional's home, and leaders are encouraged to reach out to HR for mailing information.
- **Make Their Day Cards:** Looking for a simple, and effective way to celebrate a teammate? Utilize a Make Their Day Card and drop it off via inter office mail, or a surprise delivery at the professional's work station. These cards can be found near the common-area communication board located in the Hospital Cafeteria.

- **Cheers from Peers Program:** When a Samaritan Professional receives an abundance of Make Their Day cards, the professional can redeem them for points in HR to win a number of prizes including Samaritan logo wear, gear, or even coffee cards redeemable at the hospital or clinic espresso stand!
- **Professional of the Month:** Looking to recognize a Samaritan Professional for going above and beyond in their role? We encourage leaders to utilize the Professional of the Month Nomination portal located on our organization's intranet page. (located on the left hand side of main intranet page)

- o The Professional of the Month must meet one or more of the following criteria:
  - Demonstrates professional standards by consistent delivery of superior patient care and/or customer service
  - Demonstrates continuous improvement by creating innovative ways of improving work standards, improving efficiency and/or recommending cost-saving methods
  - Acts as a role model by consistently demonstrating the Samaritan Values & Performance



## Additional RISE Tools

The following tools have been developed and shared from our various RISE teams. These tools complement many of our organizational programs and expectations for communication, patient experience, and employee engagement. If you have additional questions or would like to know more about a specific tool, please reach out to the team lead as they will be happy to share more with you!

### Illuminate Tools: Patient Experience

- Hallway Hospitality – HEART
- Telephone Etiquette
- Words to Choose, Words to Lose

**Values**



**Standards**

- I will make eye contact, and present attentive body language when interacting with others.
- I will make all admissions to give you my full attention and focus.
- I will listen with the intent of seeking to understand the message.
- I will make sure that I take time to review and rewording your message.


- I will observe and notice interactions with my coworkers and patients.
- I will put others needs ahead of my own.
- I will be encouraging and uplifting to those around me.
- I will be kind and compassionate to all.
- I will give you the time needed to make you feel supported and comfortable.
- I will engage in conversations to review and rewording the message.
- I will engage in conversations to review and rewording the message.


- I will demonstrate resilience rather than reacting or having stress.
- I will be adaptable and open to new perspectives that may be different than my own.
- I will be transparent, open and honest in my communication.
- I will demonstrate and practice resilience with my coworkers and patients.


- I will give more than is expected.
- I will demonstrate that I am the Patient Experience, an ambassador for Samaritan Healthcare, and a role model for others by demonstrating and modeling the behaviors and standards.
- I will engage in promoting and nurturing a growth of the culture.
- I will take an active role in shaping and defining the nature of the culture.
- I will take the initiative to identify opportunities and solutions.


- I will embrace and promote change to facilitate technology and growth of our culture.
- I will be a leader in the growth of our culture by identifying areas of need and growth.
- I will engage in promoting and nurturing a growth of the culture.
- I will take an active role in shaping and defining the nature of the culture.
- I will take the initiative to identify opportunities and solutions.

Let's practice Hallway Hospitality and say *Hello* to every person you pass!

Here's an easy way to remember:

|         |             |                 |                    |                            |
|---------|-------------|-----------------|--------------------|----------------------------|
| H       | E           | A               | R                  | I                          |
| Head up | Eye Contact | Acknowledgement | Read body language | Take action where they are |

Brought to you by: ILLUMINATE  
The Patient Experience Team

### Ignite Tools: Employee Experience

- Resiliency & Recovery – take home check list
- Cheers from Peers
- Behavior Standards
- Season of Gratitude Challenge

### Imagine Tools: Training & Communication

- Professional Connect – Formerly known as Employee Forums
- CEO Listening Sessions
- Semi-Annual All-Teams Training