

# PRACTICING EFFECTIVEMANAGEMENT

Participant Materials

## Possible questions to weave in to One-on-Ones or supervision:

On a scale of 1-10, where would you rate your job satisfaction today?

On a scale of 1-10, where would you rate your burnout level today (10=crispy critter)?

What can I do to help you be successful?

What can the organization do to prepare you to be more successful in your position?

What has gone well this week?

What has been difficult this week?

What are you most proud of this past week/month?

What is preventing you from being more productive?

What would you like me to do more of? Less of?

Do you feel you have the opportunity to use your strengths every day?

How would you assess the value you are providing to our clients?

What opportunities at work do you have to learn and grow?

If you could have a “re-do” for something you did at work recently, what would it be?

Is there anything you would change about your position/our team/my supervision? If so, what?

What is an area you would like to grow in?

Other: \_\_\_\_\_

Other: \_\_\_\_\_

*The wise man doesn't give the right answers, he poses the right questions.*

- Claude Levi-Strauss

# SAMPLE 1:1 MEETING TEMPLATE

## 1:1 Supervision

Date: \_\_\_\_\_

Project Update (Outcomes/Deliverables, Deadlines)	Notes
<hr/> <p data-bbox="180 846 354 882"><u>Action Plan</u></p>	<p data-bbox="946 846 1094 882"><u>Follow up</u></p>
<b>Business Opportunities, Ideas &amp; Innovations</b>	
<hr/> <p data-bbox="180 1308 354 1344"><u>Action Plan</u></p>	<p data-bbox="946 1308 1094 1344"><u>Follow up</u></p>
<b>Signs of Encouragement</b>	
<hr/> <p data-bbox="180 1717 354 1753"><u>Action Plan</u></p>	<p data-bbox="946 1717 1094 1753"><u>Follow up</u></p>

**Wellness, Development, & Performance**

**Notes**

Action Plan

Follow up

**Operations**

Action Plan

Follow up

**Miscellaneous**

Action Plan

Follow up

# Markus Buckingham's Trombone Player Wanted Series – Discovering Strengths

## Myths

#1: As you grow, you change.

#2: You will grow the most in the areas you are the weakest.

#3: Put your strengths second to the needs of the team. The team needs you to put aside your strengths and do whatever it takes to get the win.

## Truths

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

## Strengths

1. Which part of your job leaves you feeling energized?
2. When do you feel strong at work?
3. What part of your work day or work week do you look forward to?
4. Which tasks do you wish you had more time to work on?

*If you struggled to answer or could not answer questions 1-4, think about a previous job, an earlier time in your current position, or another area of your life and then answer the questions.*

5. How could you devote more time to focusing on your strengths next week?
6. How are you holding yourself back from playing to your strengths?



# Feedback Model: Examples

*“Can I give you some feedback?”*

*When you \_\_\_\_\_, here’s what happens: \_\_\_\_\_.*

*Can you do that differently next time?”*

<u>When you...</u>	<u>Here’s what happens...</u>
Show up for work on time	That really helps us to stay on task
Show up late for work	It sets us back
Show up to meetings on time and prepared	We start on time and meet our agenda goals
Don’t communicate your lateness	I worry about you
Show up late for a meeting	We have to take time to bring you up to speed on what was missed
Meet project deadlines	It keeps us on track
Miss project deadlines	It prevents the team from meeting project deadlines within budget
Come prepared for a meeting	It sets the tone for your team
Take extra time to train new staff	It goes a long way toward having a fully trained and operational team
Roll your eyes and cross your arms during a meeting with a customer	It affects our relationship with our customer and makes them feel unimportant
Take the initiative to complete a report without prompting	That shows ownership and makes my job easier
Offer to take on additional tasks during a co-worker’s absence	Our office functions a lot more smoothly
Communicate changes to your schedule	Our team functions better and I stay informed about our team
Prepare a meeting agenda and send it to attendees beforehand	It helps us achieve our meeting goals
Don’t leave the meeting room the way you found it	It delays meeting start times for other people
Don’t use an away message on your phone or email	It affects your rapport with customers and co-workers

# Communicating Organizational Policies/Decisions

## Large Group Role Play Scenarios

### Productivity

**Scenario #1:** Your company is holding a mandatory day-long trauma-informed system of care training followed by a half day retreat to review progress on agency goals, celebrate successes, present awards and share the updated strategic plan. Your staff are asking if the productivity standard for the month will be lowered as they are unable to provide direct services during these one and a half days. A few staff have made it clear (in front of their peers) that they will not be going to the training if the hours aren't excluded from the productivity standard and that the training and retreat are a waste of time.

**Supervisor:** The majority of your team meet their productivity standard each month and you believe those staff will still meet the standard, even with the 1.5 days devoted to the training and retreat. The staff that have not been meeting productivity are on plans of correction as they have missed the target for multiple months in a row, regardless if there were trainings/meetings scheduled or not. You have explained to your team multiple times that indirect activities such as meetings and trainings are included in the productivity calculation but you are unsure if the trauma-informed training was included when the original calculation was completed as it was done a few years ago.

**Employees:** You are meeting with your supervisor in a group. Some of you understand and are not concerned. Others feel the productivity standards are unfair and the company continues to ask you to provide more services in less time (due to your perception of increased meetings and new initiatives such as trauma-informed care).

**Scenario #2:** Your CEO decides that each team within the organization must have a mandatory, daily team meeting, in-person at the office. These must start within the next week. Teams have historically met weekly or every other week and have found that structure to be effective. You and a few other managers suspect this decision is due to recent issues with one team in which the supervisor does not engage in frequent communication and there are frequently performance issues throughout the team. This change significantly impacts the schedule of all staff, as they are typically in the community providing services. They typically schedule their day according to geographic areas in which they need to complete visits and coming to the office daily is likely to reduce direct service hours provided.

**Supervisor:** You believe this is a knee-jerk reaction by the CEO due to incompetence within one team. You are frustrated that your team has to change practice due to the issues within the other team that are not being addressed directly.

**Employees:** Some of you feel this daily meeting will provide an opportunity for increased support/guidance from your co-workers. Others feel this is a ridiculous demand by administration due to another team that is always messing up. You feel you are being punished because that team's supervisor isn't good at her job. You're sure this daily meeting will make it impossible to meet your direct service goal.

<b>Life Change Index Scale (The Stress Test)</b>		
<b>Event</b>	<b>Impact Score</b>	<b>My Score</b>
Death of spouse	100	
Divorce	73	
Marital separation	65	
Jail term	63	
Death of close family member	63	
Personal injury or illness	53	
Marriage	50	
Fired at work	47	
Marital reconciliation	45	
Retirement	45	
Change in health of family member	44	
Pregnancy	40	
Sex difficulties	39	
Gain of a new family member	39	
Business readjustment	39	
Change in financial state	38	
Death of a close friend	37	
Change to a different line of work	36	
Change in number of arguments with spouse	35	
Mortgage over \$20,000	31	
Foreclosure of mortgage or loan	30	
Change in responsibilities at work	29	
Son or daughter leaving home	29	
Trouble with in-laws	29	
Outstanding personal achievement	28	
Spouse begins or stop work	26	
Begin or end school	26	
Change in living conditions	25	
Revisions of personal habits	24	
Trouble with boss	23	
Change in work hours or conditions	20	
Change in residence	20	
Change in schools	20	
Change in recreations	19	
Change in church activities	19	
Change in social activities	19	
Mortgage or loan less than \$20,000	17	
Change in sleeping habits	16	
Change in number of family get-togethers	15	
Change in eating habits	15	
Vacation	13	
Christmas approaching	12	
Minor violation of the law	11	
Total		

**Directions:** If an event mentioned above has occurred in the past year, or is expected in the near future, copy the number in the score column. If the event has occurred or is expected to occur more than once, multiply this number by the frequency of the event.

## Scoring The Life Change Index

The body is a finely timed instrument that does not like surprises. Any sudden change or stimuli which affects the body, or the reordering of important routines that the body becomes used to, can cause needless stress, throwing your whole physical being into turmoil.

The following chart will give you some idea of how to informally score yourself on the Social Readjustment Scale. Since being healthy is the optimum state you want to achieve, being sick is the state of being you most want to avoid.

<b>Life Change Units</b>	<b>Likelihood of Illness in Near Future</b>
300+	about 80 percent
150-299	about 50 percent
Less than 150	about 30 percent

The higher your life change score, the harder you have to work to get yourself back into a state of good health.

T.H.Holmes and T.H. Rahe. "The Social Readjustment Rating Scale," Journal of Psychosomatic Research. 11:213, 1967.

# COMPASSION FATIGUE SELF-TEST

Answer the questions below to the best of your knowledge. There is no right or wrong answer. Assign one of these numbers to each one of the questions below:

Responses: 1 = Very True 2 = Somewhat True 3 = Rarely True

You will find summation directions at the end of the test.

- \_\_\_\_\_ 1. When people get upset, I try to smooth things out.
- \_\_\_\_\_ 2. I am able to listen to other's problems without trying to "fix" them and/or take away their pain.
- \_\_\_\_\_ 3. My self-worth is determined by how others perceive me.
- \_\_\_\_\_ 4. When I am exposed to conflict, I feel it is my fault.
- \_\_\_\_\_ 5. I feel guilty when others are disappointed by my actions.
- \_\_\_\_\_ 6. When I make a mistake, I tend to be extremely critical of myself. I have difficulty forgiving myself.
- \_\_\_\_\_ 7. I usually know how I want other people to treat me.
- \_\_\_\_\_ 8. I tell people how I prefer to be treated.
- \_\_\_\_\_ 9. My achievements define my self-worth.
- \_\_\_\_\_ 10. I feel anxious in most situations involving confrontation.
- \_\_\_\_\_ 11. In relationships, it is easier for me to "give" than to "receive".
- \_\_\_\_\_ 12. I can be so focused on someone I am helping that I lose sight of my own perceptions, interests and desires.
- \_\_\_\_\_ 13. It is hard for me to express sadness.
- \_\_\_\_\_ 14. To make mistakes means that I am weak.
- \_\_\_\_\_ 15. It is best to not "rock the boat" or "make waves."
- \_\_\_\_\_ 16. It is important to put people at ease.
- \_\_\_\_\_ 17. It is best not to need others.
- \_\_\_\_\_ 18. If I cannot solve a problem, I feel like a failure.
- \_\_\_\_\_ 19. I often feel "used up" at the end of the day.
- \_\_\_\_\_ 20. I take work home frequently.
- \_\_\_\_\_ 21. I can ask for help but only if the situation is serious.
- \_\_\_\_\_ 22. I am willing to sacrifice my needs in order to please others.
- \_\_\_\_\_ 23. When faced with uncertainty, I feel that things will get totally out of control.
- \_\_\_\_\_ 24. I am uncomfortable when others do not see me as being strong and self-sufficient.
- \_\_\_\_\_ 25. In intimate relationships, I am drawn to people who are needy or need me.
- \_\_\_\_\_ 26. I have difficulty expressing my differing opinion in the face of an opposing viewpoint.
- \_\_\_\_\_ 27. When I say "no," I feel guilty.
- \_\_\_\_\_ 28. When others distance from me, I feel anxious.
- \_\_\_\_\_ 29. When listening to someone's problems, I am more aware of their feelings than I am of my own feelings.
- \_\_\_\_\_ 30. I find it difficult to stand up for myself and express my feelings when someone treats me in an insensitive manner.
- \_\_\_\_\_ 31. I feel anxious when I am not busy.
- \_\_\_\_\_ 32. I believe that expressing resentments is wrong.

- \_\_\_\_\_ 33. I am more comfortable giving than receiving.
- \_\_\_\_\_ 34. I become anxious when I think I've disappointed someone.
- \_\_\_\_\_ 35. Work dominates much of my life.
- \_\_\_\_\_ 36. I seem to be working harder and accomplishing less.
- \_\_\_\_\_ 37. I feel most worthwhile and alive in crisis situations.
- \_\_\_\_\_ 38. I have difficulty saying "no" and setting limits.
- \_\_\_\_\_ 39. My interests and values reflect what others expect of me rather than my own interests and values.
- \_\_\_\_\_ 40. People rely on me for support.

It is important for you to periodically review your self-care, along with your needs and action plans to meet those needs.

If you find that you responded with a 1 (Very True) to more than 15 of these items, it's definitely time to take a close and careful look at self-care issues.

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# PROFESSIONAL QUALITY OF LIFE SCALE

When you [help] people you have direct contact with their lives. As you may have found, your compassion for those you [help] can affect you in positive and negative ways. Below are some questions about your experiences, both positive and negative, as a [helper]. Consider each of the following questions about you and your current work situation.

Select the number that honestly reflects how frequently you experienced these things in the last 30 days.

1=Never	2=Rarely	3=Sometimes	4=Often	5=Very Often
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1. \_\_\_\_\_ I am happy
2. \_\_\_\_\_ I am preoccupied with more than one person I [help]
3. \_\_\_\_\_ I get satisfaction from being able to [help] people
4. \_\_\_\_\_ I feel connected to others
5. \_\_\_\_\_ I jump or am startled by unexpected sounds
6. \_\_\_\_\_ I feel invigorated after working with those I [help]
7. \_\_\_\_\_ I find it difficult to separate my personal life from my life as a [helper]
8. \_\_\_\_\_ I am not as productive at work because I am losing sleep over traumatic experiences of a person I [help]
9. \_\_\_\_\_ I think that I might have been affected by the traumatic stress of those I [help]
10. \_\_\_\_\_ I feel trapped by my job as a [helper]
11. \_\_\_\_\_ Because of my [helping], I have felt "on edge" about various things
12. \_\_\_\_\_ I like my work as a [helper]
13. \_\_\_\_\_ I feel depressed because of the traumatic experiences of the people I [help]
14. \_\_\_\_\_ I feel as though I am experiencing the trauma of someone I have [helped]
15. \_\_\_\_\_ I have beliefs that sustain me
16. \_\_\_\_\_ I am pleased with how I am able to keep up with [helping] techniques and protocols
17. \_\_\_\_\_ I am the person I always wanted to be
18. \_\_\_\_\_ My work makes me feel satisfied
19. \_\_\_\_\_ I feel worn out because of my work as a [helper]
20. \_\_\_\_\_ I have happy thoughts and feelings about those I [help] and how I could help them
21. \_\_\_\_\_ I feel overwhelmed because my case [work] load seems endless
22. \_\_\_\_\_ I believe I can make a difference through my work
23. \_\_\_\_\_ I avoid certain activities or situations because they remind me of frightening experiences of the people I [help]
24. \_\_\_\_\_ I am proud of what I can do to [help]
25. \_\_\_\_\_ As a result of my [helping], I have intrusive, frightening thoughts
26. \_\_\_\_\_ I feel "bogged down" by the system
27. \_\_\_\_\_ I have thoughts that I am a "success" as a [helper]
28. \_\_\_\_\_ I can't recall important parts of my work with trauma victims
29. \_\_\_\_\_ I am a very caring person
30. \_\_\_\_\_ I am happy that I chose to do this work

## WHAT IS MY SCORE AND WHAT DOES IT MEAN?

In this section, you will score your test so you understand the interpretation for you. To find your score on **each section**, total the questions listed on the left and then find your score in the table on the right of the section.

### Compassion Satisfaction Scale

Copy your rating on each of these questions on to this table and add them up. When you have added them up you can find your score on the table to the right.

3. \_\_\_\_\_  
6. \_\_\_\_\_  
12. \_\_\_\_\_  
16. \_\_\_\_\_  
18. \_\_\_\_\_  
20. \_\_\_\_\_  
22. \_\_\_\_\_  
24. \_\_\_\_\_  
27. \_\_\_\_\_  
30. \_\_\_\_\_

**Total:** \_\_\_\_\_

The sum of my Compassion Satisfaction questions is	So My Score Equals	And my Compassion Satisfaction level is
22 or less	43 or less	Low
Between 23 and 41	Around 50	Average
42 or more	57 or more	High

### Burnout Scale

On the burnout scale you will need to take an extra step. Starred items are "reverse scored." If you scored the item 1, write a 5 beside it. The reason we ask you to reverse the scores is because scientifically the measure works better when these questions are asked in a positive way though they can tell us more about their negative form. For example, question 1. "I am happy" tells us more about

- \*1. \_\_\_\_\_ = \_\_\_\_\_  
\*4. \_\_\_\_\_ = \_\_\_\_\_  
8. \_\_\_\_\_  
10. \_\_\_\_\_  
\*15. \_\_\_\_\_ = \_\_\_\_\_  
\*17. \_\_\_\_\_ = \_\_\_\_\_  
19. \_\_\_\_\_  
21. \_\_\_\_\_  
26. \_\_\_\_\_  
\*29. \_\_\_\_\_ = \_\_\_\_\_

**Total:** \_\_\_\_\_

The sum of my Burnout Questions is	So my score equals	And my Burnout level is
22 or less	43 or less	Low
Between 23 and 41	Around 50	Average
42 or more	57 or more	High

You Wrote	Change to
	5
2	4
3	3
4	2
5	1

the effects of helping when you are *not* happy so you reverse the score

### Secondary Traumatic Stress Scale

Just like you did on Compassion Satisfaction, copy your rating on each of these questions on to this table and add them up. When you have added them up you can find your score on the table to the right.

2. \_\_\_\_\_  
5. \_\_\_\_\_  
7. \_\_\_\_\_  
9. \_\_\_\_\_  
11. \_\_\_\_\_  
13. \_\_\_\_\_  
14. \_\_\_\_\_  
23. \_\_\_\_\_  
25. \_\_\_\_\_  
28. \_\_\_\_\_

**Total:** \_\_\_\_\_

The sum of my Secondary Trauma questions is	So My Score Equals	And my Secondary Traumatic Stress level is
22 or less	43 or less	Low
Between 23 and 41	Around 50	Average
42 or more	57 or more	High

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## YOUR SCORES ON THE PROQOL: PROFESSIONAL QUALITY OF LIFE SCREENING

Based on your responses, place your personal scores below. If you have any concerns, you should discuss them with a physical or mental health care professional.

### **Compassion Satisfaction** \_\_\_\_\_

Compassion satisfaction is about the pleasure you derive from being able to do your work well. For example, you may feel like it is a pleasure to help others through your work. You may feel positively about your colleagues or your ability to contribute to the work setting or even the greater good of society. Higher scores on this scale represent a greater satisfaction related to your ability to be an effective caregiver in your job.

The average score is 50 (SD 10; alpha scale reliability .88). About 25% of people score higher than 57 and about 25% of people score below 43. If you are in the higher range, you probably derive a good deal of professional satisfaction from your position. If your scores are below 40, you may either find problems with your job, or there may be some other reason—for example, you might derive your satisfaction from activities other than your job.

### **Burnout** \_\_\_\_\_

Most people have an intuitive idea of what burnout is. From the research perspective, burnout is one of the elements of Compassion Fatigue (CF). It is associated with feelings of hopelessness and difficulties in dealing with work or in doing your job effectively. These negative feelings usually have a gradual onset. They can reflect the feeling that your efforts make no difference, or they can be associated with a very high workload or a non-supportive work environment. Higher scores on this scale mean that you are at higher risk for burnout.

The average score on the burnout scale is 50 (SD 10; alpha scale reliability .75). About 25% of people score above 57 and about 25% of people score below 43. If your score is below 43, this probably reflects positive feelings about your ability to be effective in your work. If you score above 57 you may wish to think about what at work makes you feel like you are not effective in your position. Your score may reflect your mood; perhaps you were having a “bad day” or are in need of some time off. If the high score persists or if it is reflective of other worries, it may be a cause for concern.

### **Secondary Traumatic Stress** \_\_\_\_\_

The second component of Compassion Fatigue (CF) is secondary traumatic stress (STS). It is about your work related, secondary exposure to extremely or traumatically stressful events. Developing problems due to exposure to other’s trauma is somewhat rare but does happen to many people who care for those who have experienced extremely or traumatically stressful events. For example, you may repeatedly hear stories about the traumatic things that happen to other people, commonly called Vicarious Traumatization. If your work puts you directly in the path of danger, for example, field work in a war or area of civil violence, this is not secondary exposure; your exposure is primary. However, if you are exposed to others’ traumatic events as a result of your work, for example, as a therapist or an emergency worker, this is secondary exposure. The symptoms of STS are usually rapid in onset and associated with a particular event. They may include being afraid, having difficulty sleeping, having images of the upsetting event pop into your mind, or avoiding things that remind you of the event.

The average score on this scale is 50 (SD 10; alpha scale reliability .81). About 25% of people score below 43 and about 25% of people score above 57. If your score is above 57, you may want to take some time to think about what at work may be frightening to you or if there is some other reason for the elevated score. While high scores do not mean that you do have a problem, they are an indication that you may want to examine how you feel about your work and your work environment. You may wish to discuss this with your supervisor, a colleague, or a health care professional.

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# Management by Objectives

On a scale from 1-10, where would you rate your performance with staying focused on objectives, rather than being driven by crisis or external focuses (such as email, phone calls, etc.)? (1 – continue focus on objectives and behaviors support that focus; 10= your day is a game of “whack-a-mole”)

1      2      3      4      5      6      7      8      9      10

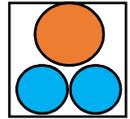
How do you define success in your job?

What is your vision for your department/team?

Is your team equipped with the resources to achieve success?

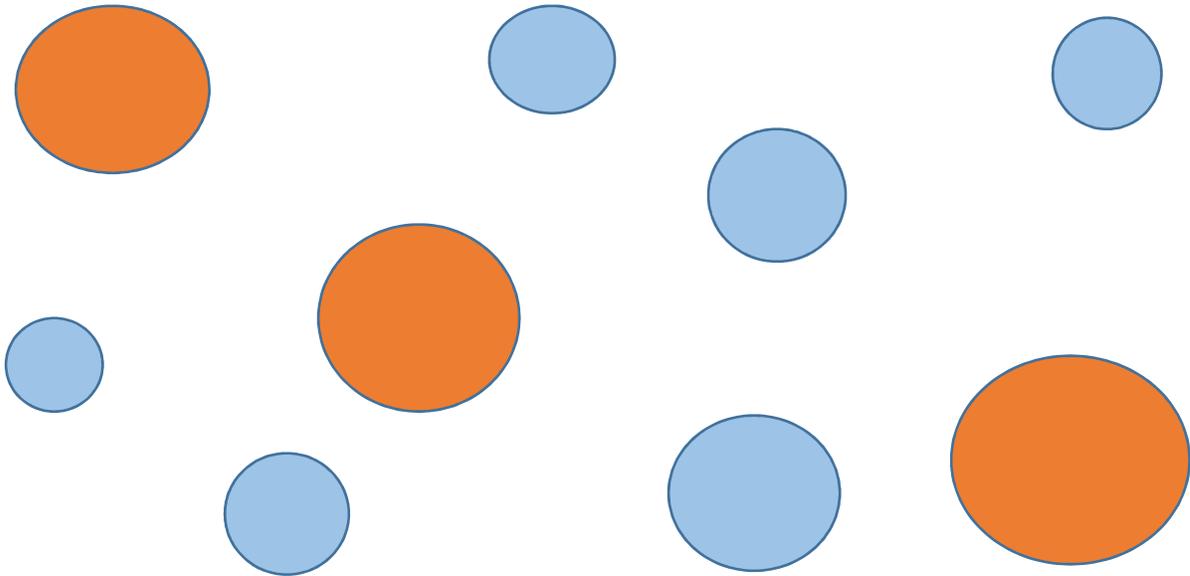
Do your staff have the resources they need to advance the vision/objectives of the organization?

In what ways does your job challenge you from meeting your objectives?



# Delegation

Label each “ball” with a task that you are currently responsible for. More important and complex tasks should be the larger “balls”. Identify one task that you could delegate to a particular staff person.



Task: \_\_\_\_\_

Selected Staff: \_\_\_\_\_

In order to successfully delegate this task, first, assess how much your employee already knows about the task or project. Ask your selected staff a few direct questions: *“How comfortable are you completing this task? How would you complete this assignment? Which steps, if any, are you not sure how to complete?”*

Assess employee competence on specific task. Delegate task based on competence level.

## The Four Stages of Competence

### 1. Unconscious Incompetence

The individual does not understand or know how to do something and does not necessarily recognize the deficit. They may deny the usefulness of the skill. The individual must recognize their own incompetence, and the value of the new skill, before moving on to the next stage.<sup>[2]</sup> The length of time an individual spends in this stage depends on the strength of the stimulus to learn.<sup>[3]</sup>

### 2. Conscious Incompetence

Though the individual does not understand or know how to do something, he or she does recognize the deficit, as well as the value of a new skill in addressing the deficit. The making of mistakes can be integral to the learning process at this stage.<sup>[4]</sup>

### 3. Conscious Competence

The individual understands or knows how to do something. However, demonstrating the skill or knowledge requires concentration. It may be broken down into steps, and there is heavy conscious involvement in executing the new skill.<sup>[3]</sup>

### 4. Unconscious Competence

The individual has had so much practice with a skill that it has become "second nature" and can be performed easily. As a result, the skill can be performed while executing another task. The individual may be able to teach it to others, depending upon how and when it was learned.

Rate your selected staff's level of competence: \_\_\_\_\_

Describe your delegation plan.

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# Decision Making

## Information Sheet | Revised Meeting Structure

As part of the work that we are doing to make information useful (*and to use it!*) across the organization, we are proposing a little experiment with how meetings are conducted. After all, meetings are one of the key places that decisions are made.

### What are we changing?

Over the next 3 months, 3 committees will pilot the use of a new agenda format, designed to promote high-quality decision making. At the end of the trial run, the committees will evaluate the usefulness of this approach and modify it as necessary.

### Data-driven decisions = logic-driven decisions

While there is a lot of momentum behind the industry's move to "data-driven" decision-making, it's important to point out that this also means logical decision-making. Picking out a few graphs that support our opinion does not mean that we are data-driven, any more than wearing a nice suit means that we are professional. We want to use data to fill in our blind spots and to give us a fuller view of the situation, not to have it replace common sense.<sup>1</sup>

### Why change our process?

Biases are a part of the way our brains work, and we can't correct them just by knowing that they exist or trying to understand them better. This doesn't make us "bad" decision makers: it makes us human. We need to use tools to check ourselves and to adjust for our natural biases.<sup>2</sup> While these cognitive biases are well-known in the field of psychology<sup>3</sup>, the behavioral health industry has seldom taken them into account by using best practices for business decisions.

The changes that are being tested are intended to accomplish the following goals:

- Increase the quality of decisions
- Increase transparency into the decision-making process
- Decrease the length of time for decisions to be made
- Provide structure to collaborative dialogue

### Let's get started!

We're glad that this is the kind of organization that tinkers, tests, and continually strives to become better. We look forward to piloting this new approach to meeting facilitation with you and your teams!

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<sup>1</sup> A helpful essay on this subject can be found here: [O'Neil, Cathy. \(2013\) On Being a Data Skeptic. O'Reilly Media.](#)

<sup>2</sup> The humble checklist is a simple and relevant tool for implementing best practice, discussed in detail by Atul Gawande in "*The Checklist Manifesto*". A [recent write-up in the Harvard Business Review](#) has applied a simple checklist to group decision-making and was used to inform the process outlined in this pilot.

<sup>3</sup> While new research continues to emerge, the book to read is still "Thinking, Fast and Slow", Nobel Prize-winner Daniel Kahneman's summary of a life's work in the field. See: [Kahneman, D. \(2011\) Thinking, Fast and Slow. Farrar, Strauss, and Giroux.](#)

# Name of Group/Meeting

Present:

Absent:

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## Purpose and Powers

*Identify the scope/function/purpose of the group.*

*Provide a brief list of the actions that it takes to perform its purpose. These will be the menu of options for the group when it makes decisions.*

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## Decisions (insert start time)

*Decisions that require use of resources (time, money) are written in the form of questions identifying the precise decision that the group is being requested to make. Each decision should be made by completing a formal [Decision-Making Checklist](#). The assumption is that all attendees are empowered to make decisions within the group's scope.*

- Decision 1 (insert start time): What should....?
- Decision 2 (insert start time): Does the committee endorse....?
- Decision 3 (insert start time): How should...?

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## Information (insert start time)

*All available information should have been shared and reviewed prior to the meeting. Prior to the meeting, attendees review materials and prepare questions/feedback. Information includes previous minutes, data reports/dashboards, announcements, etc.*

- Clarify answers to questions from group members (insert start time)
- Review Action List Progress (insert start time)
- Add items to Action List as necessary (insert start time)

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## Break (insert start time)

*During the break, facilitators will add any action items from the [Decision-Making Checklist](#) to the [Action List](#) to allow for group review of these items.*

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## Actions (insert start time)

*Actions are added to the [Action List](#) throughout the course of the meeting, and the list of uncompleted items from previous meetings carries over to the next.*

- Review upcoming Actions based on decisions

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## Communication (insert start time)

*Identify key stakeholders who need to be informed of decisions. Specify what feedback or actions the group needs from those stakeholders on the [Action List](#).*

## Decision Checklist

Using best practices to make decisions can improve decision quality and increase efficiency. Use this checklist to support any decision requiring the use of resources (time, money, etc.) by the group. Each participant should write down their own responses to each item to contribute to a well-rounded dialogue.

### Decision Question:

#### Do we have enough people?

*Involve a team of 3-7 (including yourself). Getting more perspectives reduces bias and increases buy-in, but bigger groups can hamper decisions. Try to get as close as you can to this range.*

Notes:

#### Identify Context

*Identify (and write down) 2-5 preexisting priorities that will be impacted by the decision (both positive and negative). Focusing on why a decision is important will help to avoid the rationalization trap of making up reasons for choices after the fact.*

Notes:

#### Identify Options

*Write down at least 3, but ideally 4 or more, realistic alternatives. No other practice improves decisions more than expanding your choices.*

Notes:

#### Identify Blind spots

*Review available data related to the decision. Write down the most important information you are missing. We often risk ignoring what we don't know because we are distracted by what we do know.*

Notes:

#### Identify Impact

*Write down the changes your decision will make one year in the future. Sketching the expected outcome of the decision will help identify similar scenarios that can provide useful perspective.*

Notes:

#### Document Decision

*Write down what was decided, as well as why and how much the team supports the decision. Writing these things down increases commitment and establishes a basis to measure results.*

Notes:

#### Schedule Follow-Up

*Schedule a decision follow-up in one to two months. We often forget to check in when decisions are going poorly, missing the opportunity to make corrections and learn from what's happened. On the follow-up date, add a decision item to the agenda called "Should we modify our previous decision regarding \_\_\_\_\_?", review this checklist and modify as needed.*

Notes:

## Action List

The action list is a running list of actions that (a) are being requested of group members by the committee lead or (b) have been identified as to-do items based on group decisions. These are actions that occur outside of the committee, which can be items for individuals, sub-committees, workgroups, etc.

<i>Action Item</i>	<i>Responsible</i>	<i>Date Needed</i>

# EFFECTIVE MEETINGS

1. Identify a meeting you currently facilitate.
2. What is the purpose of the meeting?
3. What is one strength of current meeting structure and/or your facilitation?
4. Identify at least one change you will implement to make this meeting more effective (such as start on time, use a parking lot, list items with start times, use of an action list, etc.).

# Growing Your Team



1. Do you make time outside of annual performance evaluations to talk about the future with your staff? If so, when and how do you do it?
2. How do you provide opportunities for growth and development of your staff? When did you do this most recently?
3. How do you expect your staff to actively seek out opportunities for growth? How do they contribute to their continued growth, learning, and education?

# Managing Up

How well do you manage up?

*For each statement below, check yes or no to indicate whether the statement applies to you.*

	Yes	No
I regularly update my supervisor about my progress on tasks and projects.		
I always keep my supervisor “in the loop” so they are not surprised by something I could have prepared her for.		
I understand my supervisor’s priorities for me and align my work to support those priorities.		
I have asked my supervisor about their preferred communication style and form of communication (face-to-face, email, phone, etc.).		
I understand my supervisor’s expectations of me (both behavior- and task-related).		
I clarify assigned tasks and specific deadlines with my supervisor to clearly understand what they want me to do and by when they want it done (e.g. specific deadlines, not just “sometime next week” or “asap”).		
I understand how my supervisor processes information and learns best. I have adapted how I communicate to meet their need.		
I share any potential problems and current issues with my supervisor on a timely basis.		
I provide potential solutions when I address problems with my supervisor.		
I look for ways to support my supervisor’s goals.		
I am always honest with my supervisor.		
I understand my supervisor’s conflict management style.		
I am always respectful when referring to my supervisor.		
I understand my supervisor’s hot buttons.		
I have communicated what I need from my supervisor to accomplish the goals and objectives they expect of me.		
I have asked my supervisor for their guidance and support in meeting my career objectives and continued growth opportunities.		
I regularly seek feedback from my supervisor and use it to improve my performance.		

# Performance Monitoring: Assess and Continuously Improve the Quality of Care

Identify a performance metric currently used to assess staff performance within your organization:

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What data is used to monitor performance?

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How is performance feedback currently provided to staff (type and frequency: monthly email report, verbal feedback quarterly, dashboards)?

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What aspect of performance (related to identified issue) is not currently being monitored? Why?

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How effective is the current feedback?

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How could monitoring be strengthened?

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# Performance Monitoring – Action Plan

Think back to what you learned about time management this morning – setting priorities, using your schedule, important things first, etc. Brainstorm which time management skills you will use to complete evaluations timely, but also complete the intermittent steps throughout the year (providing feedback, 1:1's, review of goals, etc.).

Brainstorm Time Management Skills:

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Select those skills that will work best for you and write your action plan below:

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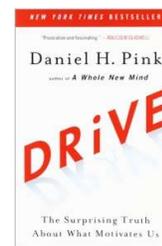
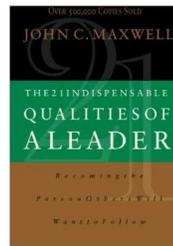
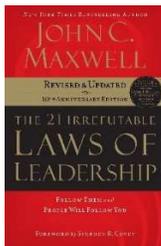
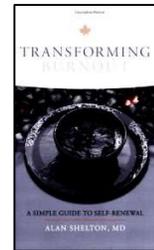
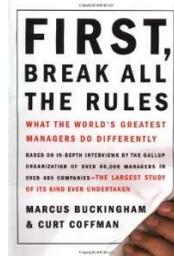
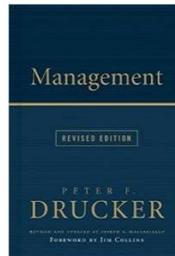
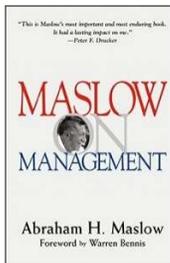
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# Resources

## Books



## Podcasts

Manager Tools

[www.manager-tools.com/podcasts](http://www.manager-tools.com/podcasts)

Harvard Business Review Ideacast

<http://feeds.harvardbusiness.org/harvardbusiness/ideacast/>

## Groups/Forums

Toastmasters

[www.toastmasters.org](http://www.toastmasters.org)

Grand Rapids Area Professionals for Excellence (GRAPE)

[www.grapegr.org](http://www.grapegr.org)

Young Nonprofit Professionals Network (YNPN)

[www.ynpn.org](http://www.ynpn.org)

Creative Mornings

[creativemornings.com](http://creativemornings.com)

Grand Rapids Young Professionals (GRYP)

[www.gryp.org](http://www.gryp.org)

Manager Tools

[manager-tools.com/forums](http://manager-tools.com/forums)

## Free/Low Cost Education

Coursera

[www.coursera.org](http://www.coursera.org)

Lynda

[www.lynda.com](http://www.lynda.com)

Acumen

[www.acumen.org](http://www.acumen.org)

Khan Academy

[www.khanacademy.org](http://www.khanacademy.org)

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