The Manager's Guide to
Engaging Staff

Toolkit for helping your team feel inspired to do their best work

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Table of Contents

This toolkit includes a variety of tools to help you engage your staff. You don't need to read this toolkit cover-to-cover; instead, jump to the category you're most interested in. Find a quick overview of each tool on this page and the following page.

Table of Contents (cont.)

In addition to the tools shown here, each category also includes "Quick Tips" to help you brush up on the basics.

Executive Summary

Engaged Team Members Get Better Results
Engaged staff don't just enjoy their jobs and their workplace—they're inspired to do their best work, and they're willing to go above and beyond to help their organization succeed. Not surprisingly, health care organizations with higher levels of staff engagement have higher patient satisfaction scores, better staff retention, and a stronger culture of safety.

As a manager you have a tremendous impact on your team's engagement. You directly influence whether team members feel recognized for their work, have opportunities to develop new skills, and understand how their work contributes to your organization's mission.

Ready-to-Use Tools to Help You Engage Staff
This toolkit is designed to help you improve your team's engagement. We hope this toolkit gives you some new ideas about how you can engage staff.

In addition, you're likely already doing many things to engage your staff—such as having one-on-one conversations about career paths or writing thank-you notes to staff to recognize their hard work. We hope this toolkit will contain ideas that make the things you're already doing easier and more effective.

Where to Start
You don't need to read this toolkit cover-to-cover. Instead, browse the table of contents on pages 3-4, and jump to the category you're most interested in. There's a variety of tools within each category. Review the brief tool descriptions on the first page of each category and pick one or two that you'd like to implement.

If you have recent engagement survey results for your team, we recommend using those results to help you decide which categories to focus on.

Contribution to Mission

We all want to understand how our work connects to the bigger picture.
Think of a time when you've been asked to complete a task that didn't seem to have any importance—it probably felt like "busy work." In contrast, when we understand how otherwise mundane work relates to a larger goal, we're more invested in doing the work well.

As a manager, you can help staff see how their work contributes to your organization's mission.
When staff understand the impact of their work (on the organization's performance, on colleagues, and on patients), they're likely to both work harder and enjoy their work more.

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Show Staff Their Contribution to Mission	🕐	👍👍
Show staff how they impact patients and customers	Patient Experience Sharing	🕐🕐	👍👍👍
	Internal Customer Rounding	🕐	👍👍
Make organizational goals concrete	Frontline Dashboard	🕐🕐🕐	👍👍👍
	Humanized Quality Metrics	🕐	👍👍

▶ Access these tools: **advisory.com/hrac/2016/engagestaff**

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Quick Tips to Show Staff Their Contribution to Mission

Here are four actions you can take on a daily basis to help staff understand how their work contributes to the organization's mission:

1 Start team meetings with a "mission moment"—a story of a positive patient experience (or outcome) or customer service.

2 Share what you find meaningful in your own work.
Example: What has kept you at the organization? What experiences have been most meaningful for you?

3 Encourage staff who volunteer in the community (through organization-sponsored events or on their own) to discuss their experiences with the team.

4 Remember that you likely receive more information about the organization's performance and future plans than frontline staff do. As appropriate, share information with them during team meetings so they have a better understanding of what is going on. (If you have questions about what you can share, ask your supervisor.)

Patient Experience Sharing

Goal

This tool helps you organize a structured opportunity for your staff to hear directly from a patient about his or her experience receiving care at your organization. This will give staff a better understanding of what it's like to be a patient—and how their work impacts a patient's experience.

Manager Time Commitment

For preparation and logistics: 1 hour
For discussion: 45 minutes

Staff Time Commitment

For discussion: 45 minutes

How to Use This Tool

1. **Select a speaker to discuss their care experience with staff.**

   The speaker can be a former patient, or a former patient's family member.

   Staff who were recently patients themselves at your organization are ideal speakers—especially if they were a patient on your unit or have worked in a professional capacity with your team.

   Staff who were recently patients:

   ❑ are easier to recruit and schedule.

   ❑ have instant credibility with their peers.

   ❑ are familiar with the inner-workings of your organization.

2. **Invite the guest speaker.**

   Points to cover in your invitation:

   ❑ Ask the speaker to plan to talk for 10 to 15 minutes about the care they received and their overall feedback (positive and negative) regarding their experience as a patient. Let them know you'll then facilitate a brief question-and-answer session with staff.

   ❑ Explain that your goal is to provide staff with the chance to hear directly from a patient about their experience at your organization. The session is meant to help staff better understand what it's like to receive care at the organization and to uncover ways the patient experience can be improved.

   ❑ Provide the speaker with relevant logistical details (such as potential dates and times for the session, location, and who will be in the audience).

3. **Schedule the guest speaker presentation as a 45-minute staff meeting. Schedule the meeting during a time when you'll be able to have as many staff as possible join from all shifts.**

4. **Use the Facilitation Guide on pages 11-12 to run the meeting.**

   The guide will lead you through two distinct discussions you will facilitate during the session:

   ❑ An interactive question-and-answer session with the guest speaker immediately following their 10- to 15-minute talk.

   ❑ A separate, staff-only brainstorming session once the speaker has left. During the brainstorming session, you'll encourage staff to discuss both the positive and negative aspects of the patient's experience and identify possible improvements.

5. **Follow up with your guest speaker—via email, phone call, or handwritten note—to thank them for their time and willingness to share their experience.**

Facilitation Guide

This guide will help you facilitate a staff meeting during which a former patient shares their experience receiving care at your organization.

Estimated session duration: 45 minutes

1. **Set the stage.**

   a. Introduce speaker

   b. Describe purpose of session: to help staff better understand what it's like to receive care at your organization, and to uncover ways the patient experience can be improved

2. **Disarm staff.**

   a. Explain that the goal is to learn from the speaker and improve practice

   b. Assure staff that no one is under attack, and you are not looking to assign blame

3. **Ask the guest speaker to present for 10-15 minutes.**

   a. Ask the speaker to share their experience as a patient. The speaker should share their story from admission to discharge. Ask the speaker to include:

   • Why they were admitted

   • What it was like to be a patient

4. **Encourage open dialogue during Q and A session.**

   a. Encourage back-and-forth between staff and speaker. To kick off the conversation, ask the speaker:

   • What surprised you most about your stay?

   • What will you remember?

5. **Thank the guest speaker for sharing their time and experience and escort them to the door. Explain that the next part of the session is for your staff to reflect on the speaker's story.**

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6. **Discuss the patient's story with staff.**

    a. Topics of discussion

    - What surprised you?

    - How do you feel personally about the experience this speaker shared?

    - In the patient experience the guest speaker shared, what went well? How could we help ensure this happens again in the future?

    - What went wrong—or at least, could have gone better? How could we prevent similar events in the future?

    b. If possible, link the patient's story, discussion and/or improvement efforts to key unit or organizational goals (for example, if the former patient discussed how a fall alarm was annoying—but kept her from falling—remind staff of the unit's current fall rate)

7. **Wrap up session.**

    a. Thank staff for attending the meeting

    b. Stick around after the session to answer any questions or provide one-on-one feedback and education

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Internal Customer Rounding

Goal

This tool offers a concrete way for nonclinical staff to see the impact of their work by meeting with their internal customers. As added benefit, when nonclinical staff round on units and departments, they can collect feedback, provide education, and identify improvement opportunities.

Manager Time Commitment

To implement: 1 hour
To maintain: 1 hour monthly

Staff Time Commitment

For individual staff rounders: 1 hour 30 minutes
To debrief with team: 30 minutes

How to Use This Tool

1. **Introduce the customer rounding program at a team meeting.**

   Key points to cover:

   ❑ The purpose is for rounding staff to meet with internal customers to collect feedback on what's going well and what could be improved

   ❑ Two staff will round each month

   ❑ Staff will round in two to three different departments or units, spending about an hour total rounding

   ❑ Staff should take the Rounding Documentation Form on page 15 with them, and record what they learn

   ❑ When rounding, staff should solicit feedback on their department's effectiveness, answer questions (and jot down notes about those they're not sure how to answer), and look for improvement opportunities

   ❑ After rounding, staff will report their findings back to the team. They should be prepared to discuss customer feedback and areas for improvement

2. **Select staff to complete rounds.**

   Choose two staff members each month to round on customer departments and units.

   Prioritize staff who have limited in-person contact with customers (e.g., centralized support staff, call center staff).

3. **Schedule rounding visits.**

   Rounding staff should round on two to three different customer departments or units per visit.

   To schedule the visits, reach out to the leaders of the customer units/departments.

   Key points to cover when scheduling visits with customer units/departments:

   ❑ Explain that rounding on customer units/departments allows your staff to collect feedback, answer questions, and identify improvement opportunities

   ❑ Ask if two staff members could spend roughly 20-30 minutes on the unit or department speaking with a few individual team members

   ❑ Propose several dates and times, but be sure to ask if there is a more convenient or suitable time for the staff to round

4. **Communicate logistics and expectations to the staff who will be rounding through a detailed email or quick huddle.**

   Key points to cover when explaining rounding logistics to staff:

   ❑ Contact information of customer unit/department points of contact

   ❑ Schedule details

   ❑ Reminder to bring the Rounding Documentation Form on page 15 and take notes. The rounding staff should complete the form for each unit/department they visit.

   ❑ Date of team meeting where staff will share their findings. Ask staff to complete the Post-Rounding Reflection Form on page 16 before the meeting.

5. **Conduct post-rounding debrief session.**

   You may choose to integrate the post-rounding debrief session into a regular staff meeting, or schedule a separate team meeting.

   After the rounding staff share their reports, you and your team should use any remaining time to discuss improvement opportunities and any next steps.

6. **In follow-up, send an email to your team summarizing the conclusions from the debrief session. Include agreed-upon next steps and who will be responsible for completing each.**

7. **Send a thank-you email to the customer units/departments that staff rounded on. Thank them for the opportunity to collect feedback and let them know about any relevant next steps** (for example, if you're planning to address an improvement opportunity based on the unit/department's feedback, let them know your plan).

Rounding Documentation Form

Name_____ **Date**_____

Department Visiting:_____

Introduce yourself to three or four individual staff members on the unit/department. You can speak with each staff member individually, or with a group of staff all at once. Briefly describe your role and explain that you are visiting the unit/department to see how your team can better serve them. Ask the staff if you could discuss a few questions about your department's service. If the staff agrees, ask the following questions and jot your notes in the space below.

1. What is your role in this unit/department?

2. Do you have any questions about how my team serves you, or how my team fits into the bigger picture?

3. I want to make sure that my team keeps doing the things that are best serving you. What should we make sure we keep doing?

4. How about what we aren't doing so well—how can we better serve you?

5. Is there anything else that we haven't talked about that you think my team and I should be aware of?

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Post-Rounding Reflection Form

After rounding, use the space below to reflect on what you learned from the time you spent on this department/unit.

1. What was your general sense of this customer? Did they understand who we are and how we serve them? Overall, how satisfied or dissatisfied are they with our service?

2. What should our team keep doing to serve this customer?

3. What should we change about how we serve this customer?

4. Do you have any other recommendations related to our service to this customer? If so, please list them below:

5. What should our next action steps be?

6. Do you have any questions or concerns? If so, please list them below.

Frontline Dashboard

Goal

This tool equips you to have a series of conversations with staff about improving performance on your team's top priorities, and help staff understand how their work contributes to your team's performance.

Manager Time Commitment

To implement:15 minutes
To maintain: 15 minutes to update your team's Frontline Dashboard every two to four weeks

Staff Time Commitment

For discussion: 5 to 10 minutes at change-of-shift or team huddle

How to Use This Tool

1. **Create—or enhance—your Frontline Dashboard.**

   [If you already have a Frontline Dashboard, or already display team priorities] Take the quick audit on the right to learn if you have any opportunities to do this more effectively. If all the statements accurately describe your dashboard, skip to Step 5 on the next page. If you answer "no" to one or more questions, continue reading to improve your dashboard.

2. **List your team's top three to four priorities on a whiteboard.**

   These are metrics that you have identified as your team's current areas for improvement, where you can access up-to-date information on progress. Do not select a metric for your Frontline Dashboard if you won't be able to update your team on performance at least every three weeks.

   Use the Frontline Dashboard Template and Example Frontline Dashboard on page 18 as a guide.

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Quick Audit

My team's frontline dashboard (select all that apply):

- ❑ Pinpoints no more than three priorities that are most important to my organization

- ❑ Displays current performance for the metrics I'm using to track progress

- ❑ Displays specific targets for each metric

- ❑ Makes performance data meaningful for staff by reframing metrics that are harder to understand

- ❑ Reminds staff about specific actions they can take to help improve performance

- ❑ Is located in a place where staff can see it on a daily basis

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3. **Write your team's current and target performance to the right of each metric in a way that's easy for staff to understand.** Consider reframing your metric using one of these options:

   - ❑ Use absolute numbers. For example, instead of displaying rates or percentages, you can convert this into number of patient cases, such as "[X] infections in July." See the Humanized Quality Metrics tool on page 22 for more tips.

   - ❑ Highlight how your metric relates to the patient experience. For example, instead of showing "[X]% compliance with diabetes indicators," show "[X]% diabetes patients receiving perfect patient care."

   - ❑ Use an image to show unit progress. For example, draw a pie graph or thermometer chart.

Use this template and example to draw your own Frontline Dashboard.

Frontline Dashboard Template

Our Team's Top Priorities

	What's Our Goal?	How Are We Doing Now?	What Are We Doing to Get There?
1			
2			
3			

Example Frontline Dashboard

Our Team's Top Priorities

	What's Our Goal?	How Are We Doing Now?	What Are We Doing to Get There?
1	*Increase days without falls*	*100 days without falls*	*7 days without falls*	• *Intensified toileting protocol for patients vulnerable to falls*
2	*Increase % of patients who rate communication with nurses a 9 or 10 (out of 10)*			• *Use three-day teach-back* • *Record discharge instructions for patients*
3	*Eliminate catheter-associated UTIs*	*Zero!*	*5 in October*	• *New protocol allows RNs to remove Foley catheters without physician order when appropriate*

4. **Hang the whiteboard in your daily huddle area or in an area staff often pass by.**

5. **Introduce the Frontline Dashboard to your staff.**

   Use the Unit Priority Discussion Guide, Part 1 on page 20-21 during a change-of-shift huddle or another scheduled meeting. You'll need 15 minutes.

6. **Remind staff about your team's priorities regularly.**

   Update your Frontline Dashboard with your team's current performance, and any new initiatives you've introduced. Do this every week—or less often if you don't have regular access to this information.

   Use the Unit Priority Discussion Guide, Part 2 on page 21 once per week during your change-of-shift huddle. You'll need 5 to 10 minutes.

7. **Keep staff up to date on new priorities.**

   Remove priorities as they become less important (for example, if your team hits target performance)—and celebrate your team's success by recognizing staff in a way that's professionally meaningful. Replace these priorities with new ones.

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Unit Priority Discussion Guide

Use this discussion guide to:

- ☐ Introduce your Frontline Dashboard to staff during a change-of-shift huddle or another scheduled meeting (Part 1)
- ☐ Remind staff about team priorities once a week during your change-of-shift huddle (Part 2)

Read over this Discussion Guide in advance and fill in any blanks. When you meet with staff, ensure they can see the Frontline Dashboard.

PART 1

Introduce Your Frontline Dashboard to Staff: 15 minutes

Key points to cover:

- ☐ *This is our Unit Dashboard. It displays the most important goals for our unit, and how we are performing on them.*

- ☐ *I figured out what to include on the dashboard by* [describe how you determined which priorities to display].

- ☐ *If something isn't listed here, it doesn't mean it's not important. But these three goals should be considered higher priorities.*

- ☐ *I'm hanging this dashboard where you can see it on a regular basis. Every few weeks, we'll check in together about which priorities are on the dashboard to make sure we're all on the same page about where our unit needs to focus. You can also ask questions about why we need to focus here and what we're doing as a unit to do better in these areas.*

Then ask: *Do you have any questions so far?*

- ☐ *Let's spend a few minutes reviewing our unit's current priorities. Those are the three numbered items I listed on the whiteboard today.*

- ☐ *The first priority is* [your first priority].
  In other words, [describe the metric or priority in your own words or in a way that will be easier for staff to understand].

- ☐ *The reason we care about this is* [explain why performance in this area is important].

- ☐ *So you can get a picture of how we're doing in this area now, I've included our current performance,* [state current performance] *compared to our goal or ideal performance, which is* [state target performance].

- ☐ *There are a few things we're already doing as a unit to improve and reach our goal. They are* [describe the initiatives already in place].

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Ask: *Do you have any questions about why this is a top focus for our unit?*
Follow up with:

- ❑ *Is anyone surprised that this is a top priority?*

- ❑ *Is anyone not familiar with any of these things we can do to improve?*

- ❑ *Do you have any questions about how doing these things can help to improve performance in this area?*

- ❑ *Do you have any ideas for other things we can do, or do better, to improve our performance in this area?*

Repeat for the remaining priorities on your dashboard. After each priority, pause for any questions.

Wrap up:

- ❑ *I'll update this board on a regular basis as our priorities change—for example, if we improve in one area over time, I may replace that priority with a new one. If that happens, I'll make sure to explain the new priority.*

- ❑ *Please feel free to ask me questions about anything on this board at any time.*

PART 2

Remind Staff About Unit Priorities: 5 to10 minutes

Have this conversation with staff about a week after introducing the Frontline Dashboard.

Key points to cover:

- ❑ *Let's turn to the whiteboard to review our top priorities.*

[If your unit has made progress on one of the metrics:]

- ❑ *You can see our unit has made progress on one of these areas,* [state the priority] *Congratulations! We're now closer to our goal of* [state target performance].

- ❑ Then ask: *What do you think has worked well?*

- ❑ Then ask: *Why do you think we haven't reached our goal yet?* [If staff aren't able to identify on their own why your unit hasn't hit its target yet, ask:] *Do you have any ideas for other things we can do, or do better, to improve our performance in this area?*

[If there have been no changes in one or more priorities since the last time you reviewed them with your staff:]

- ❑ *These haven't changed since the last time we reviewed them together. So, we'll still need to focus on these areas, which are* [review the priorities].

Then ask for each of these priorities:

- ❑ *Why do you think we've had trouble making progress?*

- ❑ *What can we do to make any of the things we're doing to improve more effective?*

- ❑ *Do you have any ideas for what we can do better?*

Humanized Quality Metrics

Goal

This tool helps you make key performance metrics more meaningful for staff. Many leaders default to sharing clinical performance data as abstract rates or percentages, which can hide the impact on individual patients. By communicating performance data as the actual number of patients impacted, you can make the data more meaningful to staff and increase their investment in improving performance.

Manager Time Commitment
10-60 minutes (based on data complexity)

Staff Time Commitment
None

How to Use This Tool

1. **Select a performance metric you want to make more meaningful to staff.**

    Consider metrics that are typically reported as abstract rates—for example, the number of catheter-associated urinary tract infections (CAUTIs) per 1,000 urinary catheter days.

2. **Translate the clinical data into the metric number of patients affected.**

    For example:

Original Metric	Translation	Humanized Metric
9.5 CAUTIs per 1,000 urinary catheter days	Multiply [CAUTIs/1,000 urinary catheter days] by [# catheter days in your unit each month] to find the # of CAUTIs each month. For example, if this unit had 360 catheter days per month, the calculation is: [9.5/1000] x [360/1] =3.42	3 people with CAUTI infections this month

3. **Display the "number of patients affected" metric alongside the standard clinical measure on staff-facing dashboards and graphs.**

    We recommend displaying icons of people to represent the number of patients impacted, alongside the standard metric (such as the number of infections per 1,000 device days).

    Visit advisory.com/hrac/2016/engagestaff to download a PowerPoint template with people icons ready to add.

    Humanized Quality Metrics.pptx

Example: You can use the PowerPoint template to transform clinical data that used to be communicated as abstract rates into more meaningful metrics, such as below:

ICU Department at Maple Health

Catheter-Associated Urinary Tract Infections

Infections per 1,000 Device Days

Legend:
- Infections per 1,000 Device Days
- Affected Patient
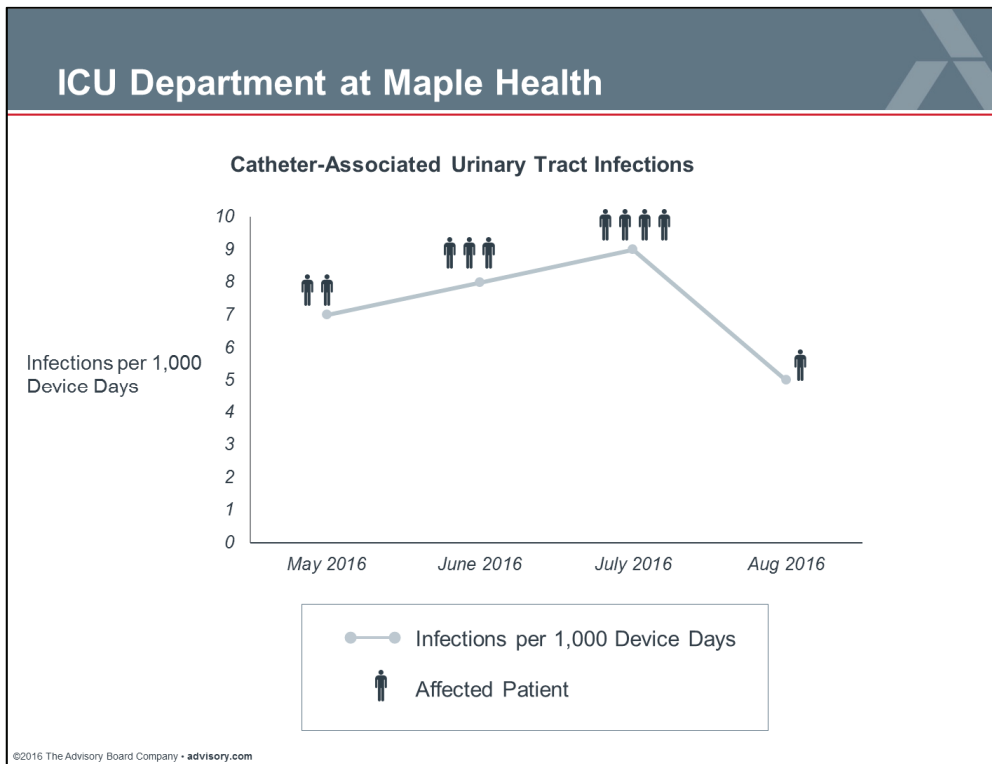
4. **Introduce the concept of "humanized data" to your staff at a team meeting.**

   Talking points:

   ❑ Describe why the metric you selected is important

   ❑ Explain how you translated the metric into actual human lives

   ❑ Tell staff that your goal is to remind them why we are tracking these numbers in the first place

   ❑ Let them know how often you'll update the data

Source: Nursing Executive Center, *Enhancing the Patient Experience,* Washington, DC: Advisory Board, 2012.

One-on-One Conversations

We all want to have a meaningful relationship with our manager.
A strong relationship improves our ability to receive feedback, ask for help, and weather day-to-day challenges at work.

As a manager, you can strengthen your relationship with your staff by hosting meaningful one-on-one conversations.
These conversations give you the opportunity to provide coaching, mentorship, and feedback to your staff.

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Improve Your One-on-One Conversations with Staff	🕐	👍 👍
Welcome new hires	Discussion Guide for Your First Check-In with New Hires	🕐	👍
	Discussion Guide for 30/60/90-Day Check-Ins	🕐	👍 👍
Have meaningful check-ins with staff	Discussion Guide for Mid-Year Check-In	🕐 🕐	👍 👍
	Start-Stop-Continue Conversation Guide	🕐 🕐	👍 👍
Deliver performance feedback	Guide for Delivering Difficult Feedback	🕐 🕐 🕐	👍 👍 👍

▶ Access these tools: **advisory.com/hrac/2016/engagestaff**

Quick Tips to Improve Your One-On-One Conversations with Staff

Here are five actions you can take on a daily basis to have more effective conversations with your staff:

1 Allow staff to finish speaking before responding.

2 Have one-on-one conversations with staff in a quiet, private place.

3 Follow through on staff check-ins; reschedule if necessary, but avoid canceling them.

4 Deliver feedback about specific events to staff as soon as possible after the event.

5 Practice delivering difficult messages with your supervisor or a fellow manager before you start difficult conversations with staff.

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Discussion Guide for Your First Check-In with New Hires

Goal
This discussion guide helps you start your relationship with your new hire on the right foot.

Manager Time Commitment
30 minutes per new hire

Staff Time Commitment
20-30 minutes

How to Use This Tool

1. **Send a welcome email to your new hire and set a time for a check-in at the end of their first week.**

   Include the following:

   ❑ Extend a warm welcome to the organization and your team

   ❑ Introduce yourself: include your name, role, and relationship to new hire (e.g., direct manager)

   ❑ Include the location and time of check-in (consider including directions if the location may be hard to find for someone new to the organization)

   ❑ Tell the new hire what they should bring to the check-in, if anything

   ❑ Let the new hire know who they should reach out to if they have any questions before you meet

2. **Review the Discussion Guide on page 28.**

   If you have time, it may also be beneficial to review the new hire's resume so you can personalize your first check-in by referencing their past experience.

3. **Meet with your new hire for 30 minutes in a quiet, private location.**

   Be sure to allot the final 5-10 minutes of the check-in to answer any questions the new hire may have.

   If your new hire shares any initial challenges (for example, missing equipment or information), prioritize resolving them as quickly as possible. Acting quickly on any early issues helps show the new hire you're glad s/he is here and can make a big difference in how s/he feels about their new role.

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Discussion Guide for Your First Check-In with New Hires

Introduce yourself and thank the new hire for taking time to speak with you. Let them know you're excited they've joined the team. Explain that you'd like to take some time to discuss their first week.

1. **Which team members have you met this week?**

   ❑ Have you been introduced to [assistant manager], [charge nurse], [secretary], and [peer mentor/buddy]?

2. **What have our team members done to make you feel welcome?**

3. **If you had questions, was someone always available to answer them?**

   ❑ Who has helped you the most?

4. **What was the best part of your first week?**

   ❑ Why did you enjoy that experience?

   ❑ *If no answer to initial question, ask:* What activity did you find most interesting?

5. **What was the most challenging thing you had to deal with this week?**

   ❑ How could we have made that challenge easier to manage?

6. **Is there anything that you think we should change to help new staff during their first week on the job here?**

   ❑ Can you tell me more about why we should make that change?

7. **Is there anything we haven't explained fully?**

Discussion Guide for 30/60/90-Day Check-Ins

Goal

This discussion guide helps you gauge how a new hire is adjusting to their new role and helps you surface any potential retention concerns. Spotting early signs of flight risk can help you take action to retain new hires before it's too late.

Manager Time Commitment
30 minutes per discussion

Staff Time Commitment
30 minutes per discussion

How to Use This Tool

1. **During the first week of a new hire's tenure, schedule 30-minute check-ins for 30, 60, and 90 days in the future.**

   Putting all three check-ins on your calendar at once will ensure you don't accidentally miss one of the milestones.

   Include the following in the invite:

   ❑ Set a time and location for the check-in

   ❑ Provide a brief overview of what you plan to ask the new hire: how the job is meeting their expectations so far, their early successes and frustrations, and ways you could better support them

2. **Review the Discussion Guide on page 31.**

3. **At the 30, 60, and 90-day milestones, meet with your new hire for 30 minutes in a quiet, private location.**

   Jot down notes during the conversation so you can refer back to the new hire's remarks afterward. Try to capture the essence of their answer, but avoid being glued to your notebook.

   If the new hire does not provide substantive answers, feel free to share stories from your own experience as a new hire at the organization. This may make the new hire more willing to share.

   If the new hire seems hesitant to provide substantive answers but you sense there may be a problem, emphasize that the goal of this conversation is to gather their feedback so you can best support them moving forward.

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4. **After the check-in, spend 5-10 minutes considering your staff's answers for signals of possible retention risk.**

For each discussion question category, ask yourself the following questions as you consider the new hire's answers. A "yes" answer indicates the new hire may be at risk of leaving the organization. The more frequently you answer "yes," the more concerned you should be about the staff member's retention.

Baseline Expectations:

❑ Does the new hire seem surprised by their job duties or work conditions?

❑ Do they express unrealistic expectations about the job or work conditions?

Acculturation:

❑ Does the new hire struggle to provide examples of helpful colleagues or personal successes?

❑ Do they mention information sources that you consider unreliable?

Challenges:

❑ Does the new hire share a high number of personal frustrations?

❑ Do they wait for others to solve problems for them?

❑ Do they blame others for problems?

❑ Are they bothered by the typical conditions of your department?

Suggested Onboarding Improvements:

❑ Does the new hire seem uninterested in personal feedback and development?

❑ Do they express limited or no desire to help your department improve?

Overall Concerns:

❑ Does the new hire report a high number of concerns?

❑ Do they avoid sharing concerns, but appear dissatisfied or anxious?

If you answer "Yes" to two or more of the questions above, the new hire may be at risk of leaving. If you want to keep this staff member, it's important that you act quickly to reduce their risk of turnover.

If the staff member raised issues you are able to address (for example: they don't know where to find something; they don't understand how to complete a certain aspect of the job; another staff member has not been as helpful as you'd hoped), do your best to address the issue quickly and let the staff member know you've done so.

Discuss the new hire's feedback with your manager to brainstorm ways to reduce the staff member's retention risk. Consider meeting with the new hire more frequently to monitor their progress and intent to stay. You may also want to contact your HR team for help.

 advisory.com
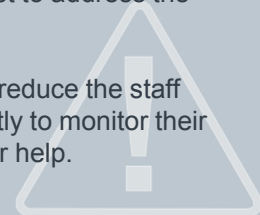
Discussion Guide for 30/60/90-Day Check-Ins

Introduce the conversation by thanking the new hire for taking time to meet with you. Explain the goal for the conversation is to understand how the job is meeting their expectations so far, their early successes and frustrations, and ways you can better support them.

Baseline Expectations

1. Has this job met your expectations? In what ways? Where has it fallen short?

2. Do you have the tools and equipment you need to do your job?

Acculturation

3. Which coworkers have been especially helpful to you?

4. What sources have you been using to learn about news in the department and the institution?

5. Tell me about some of your successes during your first [30/60/90 days].

Challenges

6. Describe any frustrations you've experienced so far.

7. Have you done anything to address these frustrations?

Suggested Onboarding Improvements

8. In what areas would more training be helpful for you and other new hires?

9. If you could change one aspect of your experience in the department, what would it be?

10. On which aspects of your job performance would you like more feedback?

Overall Concerns

11. Do you have any concerns about your job that I could address?

Discussion Guide for Mid-Year Check-In

Goal
This tool helps you lead a focused conversation with your direct reports halfway through the year. Use this conversation to let staff know how they are contributing (or could be better contributing) to the unit's or department's goals. Sharing this feedback halfway through the year gives staff a chance to course-correct if needed and helps ensure the annual performance review won't be a surprise.

Manager Time Commitment
Preparation time: 10 minutes per discussion
Delivery time: 30 minutes per discussion

Staff Time Commitment
30 minutes per discussion

How to Use This Tool

1. **Collect the most recent data on your unit or department's goals.**

   Review the data. Ensure you understand what is being measured, how it is being measured, and how the data is trending.

   If you don't have easy access to the data you need, take a few moments to reflect on your unit or department's performance to date. What is going well? Where are areas of opportunity?

2. **Identify which staff you will conduct mid-year check-ins with.**

   Ideally, you should check in with each of your direct reports.

   If you can't check-in with everyone, we recommend prioritizing your team's top performers and those with performance issues.

   Keep in mind that you don't have to host every check-in yourself. A supervisor on your team can help by hosting check-ins with staff who are solid contributors and who don't have significant performance concerns. (We recommend you personally conduct check-ins with your strongest and weakest performers).

3. **Schedule a 30-minute check-in with each staff member you plan to check in with.**

   Let the staff member know you will use this time to discuss how the unit/department is performing on its goals, and how the staff member is individually contributing to the unit's/department's performance.

4. **Take a few moments to reflect on the performance of each staff member you plan to check in with.**

   Review the questions in the Mid-Year Check-In Template on page 34 to spur your thinking and jot down notes as needed.

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5. **Meet with each staff member, using the questions on page 34 to guide the conversation.**

   If the staff member is hesitant or unwilling to share feedback during the check-in, let them know they can share feedback with you after the meeting.

   It's a good idea to take notes during this conversation—it can save you time later. Save your notes in a safe place and reference them when you complete annual performance reviews.

   If you need to deliver feedback to under-performing staff about how they can improve, review the Guide for Delivering Difficult Feedback on page 36 to get tips on sharing difficult messages.

6. **Wrap up the conversation by reviewing any next steps.**

   Thank the staff member for their time.

   Let them know about any next steps you plan to take (such as tracking down an answer to a question). At a minimum, let the staff member know the next time you plan to formally check-in with them (for example, for their annual performance review).

To take this concept one step further….

Consider saving a few minutes at the end of the mid-year check-in to exchange "start-stop-continue" feedback with your staff member. See the Start-Stop-Continue Conversation Guide on page 35 for more information.

Mid-Year Check-In Template

1. **How is the unit performing on its goals?**

   a. Indicate which goals are on track.

   b. Highlight which goals are off track.

2. **How has the team member positively impacted progress on the unit's performance goals?**

   a. Highlight at least one specific action the employee has taken in the past six months that has positively impacted the unit's performance goals.

   b. Examples:
      - "You've really made a difference by…"
      - "I'm impressed with…"

3. **What specific actions could the team member take to further help the unit meet its performance goals?**

   a. Highlight at least one action the employee could change—or push even further—to help the unit meet its performance goals.

   b. Examples:
      - "One thing I'd really like to see from you is…"
      - "Next time […] happens, I'd like you to […]"

4. **What can you do to support the team member in taking these actions?**

   a. Ask the employee how you can best support them as they contribute to the unit's/department's goals

   b. Example:
      - "What's the best way for me to support you?"

5. **Wrap up the conversation**

   a. Thank the staff member for their time and discuss any next steps.

   b. Example:
      - "Thanks for taking the time to talk. We'll meet again formally in six months for your annual performance review, but please let me know if you have any questions or things you'd like to chat about before then."

Start-Stop-Continue Conversation Guide

Goal

This guide equips you to quickly exchange meaningful feedback with your staff.

Manager Time Commitment
10-30 minutes per discussion

Staff Time Commitment
10-30 minutes per discussion

How to Use This Tool

1. **Set aside 10 to 30 minutes to exchange feedback with a staff member.**

   You can use the last few minutes of a regular check-in with the staff member to have this conversation.

2. **Send an email to your staff member letting them know you'd like to share feedback with them and hear their feedback in return.**

   Invite staff to come to the meeting prepared with ideas about the following:

   ❑ One thing the staff member would like you to *start* doing

   ❑ One thing they would like you to *stop* doing

   ❑ One thing they would like you to *continue* doing

3. **Identify what you would like your staff member to *start*, *stop*, and *continue*.**

4. **Meet with the staff member, and take turns sharing feedback.**

   You have two options for structuring the conversation:

   • You can take turns answering each question. (For instance, each of you can share what you would like the other to *start* doing, then you both share what you would like the other to *stop*, and so on).

   • One person answers all three questions in a row, and then the other person answers all three questions in a row.

5. **Conclude the discussion.**

   Key points to include:

   ❑ Thank staff for their honest feedback.

   ❑ If you plan on changing your behavior based on the staff's feedback, feel free to share this in the moment. Alternatively, let staff know you need time to reflect on the feedback.

Source: HR Advancement Center interviews and analysis.

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Guide for Delivering Difficult Feedback

Goal

This guide will help you deliver feedback in an objective, thoughtful, and constructive way. It shows how to pinpoint specific behaviors or actions that an employee needs to change and helps you prepare a road map for a clear conversation with a staff member.

Manager Time Commitment

To prepare: 15 minutes
To hold conversation: 15-30 minutes

Staff Time Commitment

15-30 minutes for conversation

How to Use This Tool

1. **Collect your thoughts about the situation.**

   Giving constructive performance feedback can be hard, but it's the best way to help staff know where they're falling short and how they can improve.

   When you need to deliver difficult feedback, it's helpful to prepare a clear, simple message in advance. This gives you the chance to think about your main points and prepare to share your thoughts in a way that the listener will be able to easily understand.

   The table below page shows a simple message structure for sharing performance feedback. When you need to deliver difficult feedback, it is helpful to separate the message into three components: Performance, Expectation and Consequence (or P-E-C). The table below shows a sample P-E-C message.

Performance-Expectation-Consequence (P-E-C) Message Components

	Think About	Example
P Is for Performance	**What did your employee do that led him or her to fail to meet performance standards?** Cite specific examples of actions or behaviors that you observed.	Jorge is a nurse in the cardiovascular unit. Last Tuesday he left work 20 minutes early without explanation. He missed the unit huddle and failed to pass information to nurses on the next shift.
E Is for Expectation	**What is the standard that you expect your employee to meet?** Explain your expectations using examples of the behavior or actions the employee **should** demonstrate.	I expect Jorge to complete his full shift and not leave without explanation. I also expect Jorge to stay for the unit huddle and give detailed information about his patients (including status updates, recent medications, and expected visitors) to nurses on the next shift.
C Is for Consequence	**What is the consequence of your employee not meeting the standard you expect?** Describe how his or her failure to meet standards impacts your team and/or the organization.	Since Jorge left early he did not have time to tell Tania, a nurse from the second shift, that one of his patients had a visitor coming that evening. Tania took the patient to X-ray and he missed his visitor. The patient and his visitor were very unhappy about this.

Source: HR Advancement Center, *The Manager's Guide to Accurate Evaluations*, Washington, DC: Advisory Board, 2014.

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2. **When you are ready to write your own P-E-C message, fill out the blank P-E-C table on page 39.**

   Your **P-E-C** message contains the heart of the feedback you need to deliver.

   Keep in mind, your staff member might be caught off guard and react defensively (and ultimately miss your point) if you jump straight to your **P-E-C** message without easing into the conversation—or if you end too abruptly.

   If you feel comfortable delivering the **P-E-C** message to the employee, you can stop here. If you want additional guidance on how to structure the conversation, continue to step 3.

3. **Prepare a road map for the conversation. Fill out the blank road map on page 39.**

   Plan how you will guide the conversation. Think about the conversation in the four parts shown in the graphic below:

Conversation Road Map

1. Start	2. Share P-E-C Message	3. Seek Input	4. Wrap Up
Clearly state that you want to talk about a specific performance issue	Share your Performance-Expectation-Consequence message	Use open-ended questions and active listening to encourage dialogue	Indicate your support and/or specific next steps
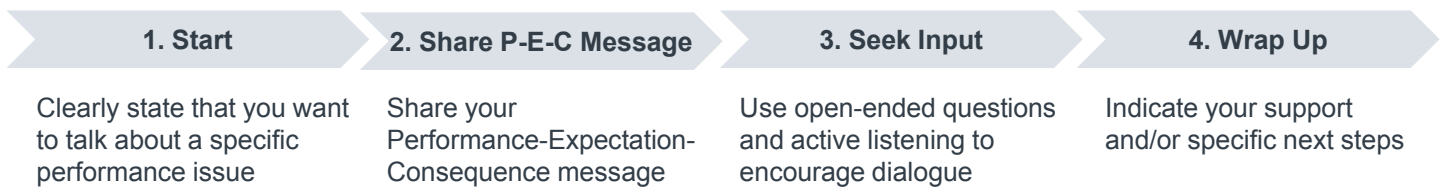
The next page contains a sample road map.

Sample Scripting and Examples for the Conversation Road Map

Road Map	Sample Talking Points	Example
Start	• I'd like to talk with you about… • I have noticed… • I am concerned about… • I want to discuss… • I have some thoughts about… • I feel I need to let you know…	Jorge, I would like to talk with you about when you left work early last Tuesday.
Share P-E-C Message	**P:** Cite specific examples of actions or behaviors that you observed. **E:** Explain your expectations using examples of the behavior or actions the employee **should** demonstrate. **C:** Describe how his or her failure to meet standards impacts your team and/or the organization.	P: I am concerned about this because you missed the unit huddle, and you didn't let me know that you would be leaving before the end of your shift. E: I expect you and everyone on our team to complete the full shift. I also expect you to stay for the unit huddle so you can pass along the necessary information about your patients to the next shift. C: Since you left early and missed the huddle, Tania didn't know that one of your patients had a visitor coming that night. She took the patient down to X-ray and he missed his visitor. The patient gave Tania a hard time when he found out he missed his visitor and his visitor complained to me.
Seek Input	• What is your view of this situation? • What are your thoughts? • Why do you think this happened? • What do you think you can do to improve? • How could you have handled that situation differently?	How could you have handled that situation differently, Jorge? Please tell me your thoughts.
Wrap Up	• I'd like to help you address this issue by… • How can I best support you…? • I expect you to [change the behavior/action]… • Let's meet again [next week, month] to follow up about…	I expect you to not miss any more staff huddles or leave a shift early unless you first talk with me about your situation. Let's meet again next week to discuss how we can both make sure this doesn't happen again.

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Conversation Planning Guide

Your Road Map

P Is for Performance	
E Is for Expectation	
C Is for Consequence	

Road Map	Your Scripting Notes
Start	
Share **P-E-C Message**	
Seek Input	
Wrap Up	

Source: HR Advancement Center, *The Manager's Guide to Accurate Evaluations,* Washington, DC: Advisory Board, 2014.

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4. **After you have completed the roadmap, consider how your staff member may react to the feedback and prepare your response.**

   Constructive feedback conversations can be hard both for you as a manager and for the staff member hearing the message. You know you have to stay clear, calm, and levelheaded. But what do you do if the employee you're talking with gets emotional or irritated?

   The table on the following page shows the most common ways employees react or push back during performance conversations. Review this table to get a feel for how your employees may react, and the approaches you could take to steer the conversation back on track:

5. **Anticipate how you think an employee will react to your performance feedback, and plan your strategy for responding to the feedback.**

   Think of a specific employee and a piece of difficult performance feedback you'd like to share. List the top two to three reactions this employee may have:

   A. _____

   B. _____

   C. _____

Your planned response to reaction A	
Your planned response to reaction B	
Your planned response to reaction C	

6. **Practice delivering the feedback**

   You can practice the conversation aloud in a room by yourself, or you can role play the conversation with your manager or a colleague.

Common Employee Reactions and Comeback Scripting

If the employee becomes a…	Employee says…	As the manager, you must become a…	You say…
Apologizer Jumps to confession before hearing the message	"I didn't mean to create any problems here at all—I know I can do better!"	**Clarifier** Verify the employee understands exactly where he or she went wrong and is committed to improving	"I appreciate that you are willing to take responsibility for your actions, but I want to discuss the issue further so we both understand what went wrong."
Denier Argues with validity of data	"I don't believe this report is right. I am always on time."	**Investigator** Provide well-researched account of events	"I'm surprised to hear you say that. I checked the timesheets and you have been late five times this quarter."
Tear-Jerker Responds emotionally and struggles to articulate thoughts	Through sobs: "I try so hard—I don't know what happened—I'm just so upset."	**Calmer** Show empathy and responsiveness to the emotions, and calmly keep to your message	"I see this is hard to hear and it's making you upset. This is an important issue and I'm hoping we can find a way to calmly talk about this together."
Blame-Shifter Points finger to avoid accountability	"It's his fault."	**Reflector** Force individual accountability for his or her role	"I am speaking to him this afternoon. Right now we are just talking about your performance."
Avoider Shuts down and avoids eye contact	"Oh…I see…sure…"	**Engager** Pause your comments and ask neutrally phrased questions to encourage engagement	"I'd like to stop for a moment and check in with you. I want to understand your perspective; could you tell me your thoughts?"
Subject-Changer Distracts with a different topic of discussion	"So, how's your family?"	**Driver** Refuse to engage in a tangent	"Great, thanks. Today, however, I need to talk to you about your performance."
Rationalizer Offers excuses to justify the behavior	"I don't have time to write everything down between patients. The next patient needs me to come quickly."	**Juror** Uphold correct behavior in spite of rationale	"I expect you and everyone on my team to document patient information in a timely manner each and every time because it greatly increases accuracy."
Score-Keeper Keeps a running list of peers' practices	"Everyone does it, so why can't I?"	**Score-Settler** Shift focus back to his or her behavior	"That doesn't make it right. The only behavior we are focusing on right now is yours."

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Professional Growth

We all want to learn, develop, and continue to grow professionally.
At some point in your career, you may have experienced the unfortunate feeling that you are "stuck" in your role without real opportunities for growth—and you know how disengaging that can feel. On the flip side, you've hopefully also experienced how energizing it can be to feel like your skills and capabilities are growing.

As a manager, you can help guide your staff to opportunities that can help them grow and develop.
You have an important perspective about your team members' strengths and how they can further develop them, or use them more in the future. Providing opportunities for your staff to build on their strengths and interests will help them feel more invested in their work and personally supported by you.

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Support Your Staff's Professional Growth	🕐	👍 👍
Learn how staff want to grow	Stay Interview Discussion Guide	🕐 🕐	👍 👍 👍*
Help staff reach their development goals	Individual Development Plan Template	🕐 🕐 🕐	👍 👍
	Stretch Opportunities Picklist	🕐 🕐 🕐	👍 👍 👍*

*
These two tools can have a significant impact if you're able to help team members follow through on the opportunities they express interest in. These tools can have a *negative* impact on engagement if you don't follow up with the team member on any promised action steps.

▶ Access these tools: **advisory.com/hrac/2016/engagestaff**

Quick Tips to Support Your Staff's Professional Growth

Here are four actions you can take on a daily basis to encourage your staff's professional growth:

1 Stay up to date on training opportunities offered at your organization so you can recommend relevant opportunities to your team.

2 Role model professional growth by dedicating time regularly to your own training and development.

3 Set aside time during team meetings for staff who have attended training or conferences to share what they learned with the team.

4 Share as much of your own career path with your team as you feel comfortable sharing.

Stay Interview Discussion Guide

Goal

This tool helps you understand how individual staff members are feeling about their current job. This can help you better support the staff member—and spot potential retention risks. The more you know about why a staff member might consider leaving the organization, the more proactive and targeted you can be in your efforts to retain them and help them grow.

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Manager Time Commitment
To implement: 30 minutes per staff member

Staff Time Commitment
To have the interview: 30 minutes

How to Use This Tool

1. **Identify which staff members you will have a stay interview with.**

   You can choose to host stay interviews with all of your team members, or with a subset of staff.

   If you have many direct reports, we recommend prioritizing stay interviews with your top performers, especially if you are concerned they might be thinking about leaving the organization.

2. **Schedule a 30-minute check-in with individual staff members to conduct the stay interview.**

   In the meeting invitation, let the staff member know:

   ❑ You'd like to use the time to discuss what the staff member enjoys about their current role and how you and the organization can better support them

   ❑ There's no need to prepare anything formally in advance

   ❑ The location (ideally, a quiet place)

3.   Use the questions on page 47 to guide your conversation

To start the conversation, explain:

❑   You value the staff member's work and think they add a lot to the team. It's important to you to make sure they feel supported in their role and enjoy their work

❑   You'd like to use the time today to hear how things are going and how you could better support them

❑   You have a few questions to ask to kick things off

Don't worry about asking every question included in the Stay Interview Guide—let the conversation flow naturally.

Jot down notes so you can remember details of the conversation later.

If your staff member shares feedback that you can respond to in the moment, feel free to do so. But it's also perfectly fine to thank the staff member for their feedback and ideas and let them know that you need some time to think it over. This gives you a chance to reflect on the feedback and discuss it with others (such as your supervisor or HR) if needed.

To wrap up the conversation

❑   Thank the team member for their time and feedback

❑   Review any next steps you've committed to (such as tracking down an answer to a question, scheduling a follow-up conversation, or looking into a specific opportunity)

To take this concept one step further….

If you speak with one of your high-performing team members and they express interest in developing specific skills, consider having a follow-up conversation to build an individual development plan together. For a template to guide the conversation, see the Individual Development Plan Template on page 48.

Stay Interview Guide

Use this template to guide your conversation and jot down notes.

1. What is your dream job and what can we do to support your progress toward it?

2. What might entice you to leave?

3. Are we fully using your talents?

4. What is the one thing that would make your job more satisfying and rewarding?

5. Do you feel we recognize you? What kind of recognition is most meaningful to you?

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Individual Development Plan Template

Goal

This tool helps you work with individual staff members to outline a plan for their continued growth and development. Building a development plan with staff shows them you're invested in their career and encourages staff to feel a sense of ownership for their own growth.

Manager Time Commitment

To implement: 45 minutes per staff member
To review progress and update plan: 30 minutes periodically (at least once per year) per staff member

Staff Time Commitment

To complete Individual Development Plan: 45 minutes
To review progress and update plan: 30 minutes periodically (at least once per year)

How to Use This Tool

1. **Select staff members to complete an Individual Development Plan (IDP).**

   There are two schools of thought regarding who should complete an IDP:

   1. One philosophy is every staff member should have an IDP to focus their (and their manager's) efforts on specific development objectives.

   2. Another philosophy is managers should reserve IDPs for staff who have a demonstrated interest in self-development.

   If you have five or fewer direct reports, we recommend completing an IDP with every staff member.

   If you have more than five direct reports, we recommend prioritizing IDPs for staff who have at least six months of tenure and meet at least one of the following criteria:

   ❑ Staff who have expressed interest in growing

   ❑ Top-performing staff who have high potential to advance

   ❑ Top-performing staff who are a retention risk
   .

2. **Schedule a 45-minute check-in with individual staff members to develop an IDP.**

   In the meeting invitation, let the staff member know:

   ❑ You'd like to use the time to discuss what the staff member enjoys about their current role and skills they'd like to further develop

   ❑ There's no need to prepare anything formally in advance, but you'd like them to come with thoughts about specific strengths they'd like to use more often or skills they'd like to develop

   ❑ The location (ideally, a quiet place)

3. **Complete the IDP template together during the one-on-one meeting.**

Start the meeting by reiterating the purpose of the conversation: it's a chance to discuss what the staff member enjoys about their current role (and would like to spend more time on) and skills they'd like to further develop.

Explain that an IDP can help both the staff member and you as their manager track progress against the staff member's goals.

Discuss the different components to the IDP (see the IDP template on page 51) and work together to fill out each section.

Personal Development Objective: This is the goal(s) that the staff member wants to achieve.

To identify potential development objectives, ask the staff member:

- What do you enjoy most about your job today? Are there strengths you'd like to spend time further developing?

- Are there specific skills you'd like to develop that would make your current job easier?

- Are there specific skills you'd like to develop to prepare for a future role?

Also think about the individual's performance evaluation and common feedback from peers or others: What strengths does this staff member have? What areas can they further develop?

Examples of personal development objectives:

- Deepen understanding of the health care business

- Improve presentation skills

- Mentor less-experienced staff

Actions: These are the specific actions the staff member will take to reach their development objectives.

The more specific the action step, the better! For example:

Too General	Specific Enough to Be Actionable
Lead a project	Serve as team leader on the taskforce looking at causes of turnover in the department
Improve critical thinking	Identify an improvement opportunity on the unit and conduct a root cause analysis to understand what's driving the problem
Communicate better	Share update on sepsis project at team meeting and ask for presentation feedback from my manager

For a list of actions to use as a starting point, review the Stretch Opportunities Picklist on page 52.

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Timeline: Give each action a deadline. You can use specific dates (e.g., July 30) or more general milestones (e.g., "Complete by end of the second quarter" or "Before the end of the year").

Resources/Support: Identify tools, trainings, or people who can help the staff member achieve their objective.

Metrics: For each of the action items, identify a way you can measure when the staff member has completed it. You might use a process-based metric (for example, completing a training class, or successfully leading two meetings) or an outcomes-based metric (for example, earning a specific score on a competency test).

4. **Hold periodic check-ins with staff members to revisit and update IDPs.**

    Ideally, you should meet with staff to discuss progress on their IDP once a quarter or once every six months. You can set aside a few minutes at the end of a regular check-in to discuss the IDP.

    At a minimum, meet with each staff member once per year to discuss progress and update the IDP.

    When you check in with staff, ask if they have the resources and support they need to achieve their development goals. If not, what are the barriers? How can you solve or work around them?

    Review the objectives and actions to see if any need to be changed to reflect new priorities or opportunities.

Personal Development Objective	Actions	Timelines	Resources/Support	Metrics
What are the two or three development objectives you want to focus on across the year.	For each development objective, what specific actions can you take that will help you achieve your goal?	Establish realistic deadlines for completing each action item.	Identify any tools, trainings, individuals, or information that will help you achieve your objective.	For each of the actions you've outlined, identify measurable outcomes to assess progress towards the development objective.
Improve presentation skills	1. Research the impact of consumerism on the health care industry and share my findings at an upcoming team meeting 2. Shadow my manager's upcoming presentation to the senior leadership team 3. Participate in the next communication class offered	1. March 2. April 3. By October	1. Practice session with manager 2. Debrief with manager after her presentation 3. List of upcoming training	1. Present to team at March meeting 2. Attend presentation and discuss what I learned with manager 3. Attend training and discuss what I learned with manager

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Stretch Opportunities Picklist

Goal

This tool will help you brainstorm opportunities to help your staff develop specific skills and "stretch" beyond their current capabilities. You can use this list as inspiration when you're working with staff to build a customized individual development plan (IDP).

.

Manager Time Commitment

15 minutes to customize list
45 minutes per staff member to host IDP discussion (see tool on page 48)

Staff Time Commitment

45 minutes to participate in IDP discussion (see tool on page 48)

How to Use This Tool

1. **Download picklist of professional growth opportunities to customize.**

   Visit advisory.com/hrac/2016/engagestaff and download an editable version of the picklist (also displayed on the following page). Delete any opportunities that aren't available for your team.

   The picklist is organized by competency and includes commonly available skill development ideas that will help you identify the specific opportunities available at your organization.

   Next, add specific opportunities available at your organization. For example, you can add formal training programs or workshops offered by your organization.

   If you're not sure what's available, check with your HR department about formal classes or trainings held at the organization or in partnership with local schools. You might also ask about financial support for education or professional growth (e.g., funds to attend a conference or tuition support).

   If possible, collect handouts or website links that describe the opportunities. You can keep these handy to share with staff.

   When you're looking for ways to expand and customize the picklist, don't forget to consider informal opportunities that may be available. For example, are there specific taskforces or projects that a team member could participate in?

2. **Work with individual team members to pick opportunities to include in their individual development plan.**

   Use your customized picklist together with the Individual Development Plan Template on page 48 to help staff build a customized plan for their professional growth.

   When selecting opportunities with staff, consider:
   - ❑ Which opportunities would help a staff member build on existing strengths?
   - ❑ Which opportunities would help a staff member build key skills required for success in a future role?
   - ❑ Which opportunities fit well with a staff member's interests?
   - ❑ Which opportunities would fit well with a staff member's existing commitments? In other words, what do they currently have the time and energy to work on?

Source: HR Advancement Center interviews and analysis.

Picklist of Professional Growth Options

Competency	Picklist of Options
Building Relationships	❑ Invite a peer in another department or an another team to go out for coffee to learn more about their role. ❑ Serve on a cross-departmental committee or task force. ❑ Serve as a mentor for a new hire or intern/volunteer (either through a formal mentoring program or informally).
Communication	❑ Present a new initiative/project at a team meeting. ❑ Research a trend impacting the health care industry and share your findings at a team meeting. ❑ Lead a team meeting. ❑ Facilitate a book club session or Journal Club for peers. ❑ Write an article for publication (either for an internal publication such as a newsletter, or for an external publication). ❑ Participate in a public speaking workshop (consider both internal opportunities but also external opportunities, such as a local Toastmasters club).
Leadership	❑ Conduct an informational interview with a leader to learn more about their role and the experiences they found most helpful to develop their leadership skills. ❑ Lead a training session on a particular skill or content area for peers. ❑ Participate on a council or committee in a leadership capacity. ❑ Act as a mentor for a peer who is struggling with a skill or competency you excel at. ❑ Identify a department/unit/team improvement opportunity and initiate a process improvement project.
Analytical Thinking	❑ Identify pros and cons of possible options for a decision and present to your supervisor with a recommended course of action. ❑ Identify an improvement opportunity and conduct a root cause analysis to understand what's driving the problem. Share your results with your supervisor.
Industry Knowledge	❑ Sign up for a regular digest of health care news (such as the Advisory Board's Daily Briefing email) to keep up with industry trends. ❑ Invite a more experienced colleague out for coffee and ask them to share how they stay up-to-date on industry trends. ❑ Attend a webconference on a topic relevant to your work and discuss the content with your supervisor. ❑ Ask your supervisor for recommended books or articles to read. ❑ Attend an open board meeting.
Customer Service	❑ Ask your supervisor to share your team's HCAHPS patient satisfaction data or internal customer satisfaction data. Discuss the strengths and areas of opportunity identified in the data with your supervisor. ❑ Put yourself in the shoes of a typical patient or customer and walk through their typical interactions with your team. Look for improvement opportunities and share them with your supervisor. ❑ Shadow an experienced colleague rounding on patients or customers. ❑ Round on patients or customers and share collected feedback with your team.

Source: HR Advancement Center interviews and analysis..

Recognition

We all want to receive credit for a job well done.
When we are recognized, we are motivated to do our best work.

As a manager, recognizing your staff's achievements and efforts shows them you value their individual contributions to the team.
This makes your staff feel appreciated and encourages them to put their best foot forward at work.

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Recognize Your Staff	⏱	👍👍
Embed recognition into your routine	Peer Compliment Jar	⏱	👍👍
	Predefined Team Goals	⏱⏱	👍👍👍
	Manager's Recognition Box	⏱⏱	👍👍👍
Learn what recognition your staff value	Recognition Preference Assessment	⏱	👍

▶ Access these tools: **advisory.com/hrac/2016/engagestaff**

Quick Tips to Recognize Your Staff

Here are six actions you can take on a daily basis to embed staff recognition into your daily work:

1 Spend five minutes on recognition at the beginning of team meetings. The more specific, the better.

2 Find a goofy item (such as a hat or stuffed animal) for staff to rotate among themselves in honor of a job well done.

3 Pass on positive feedback from others to the mentioned individual or team.
Example: your supervisor or other departments' staff

4 Create a system (such as a dedicated folder in email or a file folder) to keep track of staff accomplishments and feedback from others. Later, you can use the information when completing staff performance reviews.

5 Give verbal or written recognition to staff as soon as possible after an event or extra effort.

6 Nominate one of your team members for organizational or department awards whenever the opportunity arises.

Peer Compliment Jar

Goal

This tool helps you create an easy way for your staff to recognize one another. It's a simple idea that can have a big positive impact on relationships among members of your team.

Manager Time Commitment

To implement: 5 minutes
To share at a team meeting: 15 minutes

Staff Time Commitment

To submit feedback: 5 minutes or less

How to Use This Tool

1. **Find a small box or container to collect compliments.**

    We recommend a container with a wide opening, such as a large jar, fishbowl, or shoe box.

    Attach a small colorful sign to the container that reads "Compliments."

2. **Introduce the Compliment Jar to your team at your next staff meeting.**

    Talking points:

    ❑   Explain that it can be easy to take each other's work for granted, and it's important to recognize one another for a job well done

    ❑   Encourage staff to write a compliment for a peer on a small slip of paper, and drop it into the jar whenever they have something positive to say to a team member

    ❑   Let staff know where the jar will sit

    ❑   Tell staff that you will read the compliments at regular team meetings (once a week, month, or quarter)

3. **Place the Compliment Jar in a high-traffic area in your unit or department.**

    Include small slips of paper and pens for staff to write compliments.

4. **Read the collected compliments aloud at staff meetings.**

    We recommend you do this at the beginning or the end of the meeting—to kick things off, or close them out, on a positive note.

    Rather than read all the compliments yourself, we recommend you allow staff to pass the jar around and take turns reading one compliment aloud.

5. **To keep the initiative running, remember to replenish the paper supply, and let new staff know about the jar.**

Source: HR Advancement Center interviews and analysis.

Predefined Team Goals

Goal

This tool helps you set a predefined goal that staff can work toward to achieve recognition. This has two benefits: first, staff will know exactly what they need to do to earn recognition. Second, defining the goal in advance helps ensure you won't accidentally overlook team accomplishments that should be celebrated.

Manager Time Commitment

To implement: 30 minutes
To maintain: 10 minutes weekly

Staff Time Commitment

No commitment required

How to Use This Tool

1. **Choose a metric that your team has an opportunity to improve.**

   As you consider which metric to focus on, ask yourself the following three questions:

   ❑   Can my whole team impact this metric?

   ❑   Is this metric measured at least monthly? (Ideally metric would be measured more frequently)

   ❑   Does my team have room to improve on this metric?

   If you answer "Yes" to the questions above, the metric is a good one to use for a predefined team goal. For example:

Team Type	Sample Metrics
Clinical teams	• Patient satisfaction (overall HCAHPS scores, or specific questions on the survey) • Specific hospital-acquired infection rate • Median patient wait time
Nonclinical teams	• Room turnaround time • Percentage of co-pays collected • First-call resolution rate

2. **Set a reasonable target for your team's performance.**

   You might be familiar with the "SMART" acronym. Good goals are SMART—they are: Specific, Measurable, Actionable, Realistic, and Time-bound. Keep these principles in mind as you identify a target for your team.

   The target shouldn't be immediately within reach, but it should be reasonably achievable in the near term—within the next three months or so.

Source: HR Advancement Center, *Hardwiring Accountability at the Front Line,* Washington, DC: Advisory Board, 2012.

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3. **Decide how you will recognize your team's achievement of the target. You can either decide this yourself, or involve your staff in the decision.**

First, decide whether you want to select the reward yourself, or let your staff choose their own reward. Involving staff in the reward selection process takes more time, but it also is likely to make staff more excited to meet the target.

If you decide to let your staff decide, bring a list of options to a staff meeting for your staff to vote. Use the list below as your starting point.

Here are a few sample rewards. Remove any that don't fit within your budget, and add any additional ideas you have:

❑ Choice of snack at upcoming staff meeting

❑ Breakfast or lunch catered

❑ Option to wear jeans on Friday

❑ Option to leave early on a specific day

❑ Manager will do something goofy (e.g., wear a costume or silly hat all day)

❑ Banner for the unit/department to display on a wall

Finally, consider adding a "bonus reward" if staff exceed the target.

You can include a bonus reward if one of two things happens:

1. Team achieves the target **faster** than expected.

   For example, if it takes your team two months to reach the target, they get a Jeans Friday. If it takes them only one month, they get a Jeans Friday and a pizza party.

2. Team **improves more** than expected.

   For example, if the target metric goes up by 2% in one month, your team gets a Jeans Friday at the end of the month. If the target metric goes up by 4% in one month, your team gets a Jeans Friday and a pizza party.

4. **Introduce predefined goal at your next staff meeting.**

Talking points:

❑ Describe the metric you chose and why you chose it.

❑ Tell staff what the target is, and share how long you think it will take your team to reach the target. If you want staff to think "bigger picture," feel free to share your long-term aspiration for the target (for example, what do you hope your unit's performance will be one year from now?).

❑ If you've already decided on the reward, share this with staff. Pay close attention to see if staff seem excited about the reward, or if you should select a different reward in the future.

❑ If you didn't select the reward in advance, share your short list of options and ask staff to vote on which one they'd like most.

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5. **Visually display the team's progress.**

    Track your team's progress toward the goal to keep performance visible and top of mind. Depending on the metric, it may be more appropriate to display progress in the break room (or other area not accessible to patients), rather than publicly on the unit or department.

    Regularly update staff on progress toward the goal during team meetings.

6. **When your team meets the target, reward them as soon as possible.**

    To reward your team in a timely manner, you may need to begin to make arrangements for the reward before the team actually hits the target).

    If your team meets a target for three consecutive time periods (e.g., three months in a row), consider replacing the metric with a new goal the team can work toward.

7. **If team does not meet the target, let them know how close they came, and tell them they can try again next time.**

    Consider discussing with your team what prevented them from meeting the target, and what the team can do to meet the target in the future.

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Manager's Recognition Box

Goal

This tool helps you set yourself up to send personalized, handwritten notes to your staff members' homes to acknowledge great performance. This is a simple and effective way to deliver timely and professionally meaningful recognition to your staff.

Manager Time Commitment

To implement: 20 minutes
To maintain: 10 minutes to write a note

Staff Time Commitment

No commitment required

How to Use This Tool

1. **Gather everything you need to send notes to staff and put it in one place.**

   Collect the following items:

   ❑ List of your staff's home addresses (Ask HR if you need help getting this information)

   ❑ Note cards

   ❑ Envelopes

   ❑ Stamps

   ❑ Pens

   Use a shoebox or plastic container to hold your supplies, and put the box in an easily accessible location.

2. **Keep an eye out for opportunities to recognize your staff.**

   Events to look for:

   ❑ Receiving positive feedback from a patient or internal customer

   ❑ Receiving positive feedback from a colleague

   ❑ Achieving specialty certification or an advanced degree

   ❑ Taking on extra work to cover for another team member

   ❑ Providing an effective idea for process improvement

   ❑ Taking on an informal leadership role as a mentor to less-experienced staff

   ❑ Leading a project, committee, or taskforce

3. **Block 30 minutes on your calendar to write thank you notes. Make a recurring appointment for each month or week.**

3. **Use your recognition box to write a handwritten thank-you note and send it to the staff member's home.**

When you're writing the note, keep these principles in mind:

❑ Be as specific as possible when describing what the staff member did to earn recognition

❑ Express your gratitude for their time, dedication, creativity, teamwork, or other contribution

❑ If possible, link the staff member's action to the bigger picture of what your organization is trying to achieve (see example below)

Sample Thank You Note:

> Dear Frances,
>
> Thank you for supporting Mary and Abigail during their first few months here at Maple Health. I know you have your own full workload, but you still take the time to make sure they feel comfortable on the unit. I've noticed how you go out of your way to answer their questions, show them where supplies are stored, and help them when they encounter trouble with the EMR system.
>
> You are a living example of our commitment to service. Thank you!
>
> Sincerely,
>
> Michael

4. **Review the list of staff every six months, and make any updates. Be sure to add new staff to your list.**

Recognition Preference Assessment

Goal

This tool helps you assess your staff's personal preferences for recognition, so you can reward them in the ways that are most meaningful to them.

If you ask staff for feedback about how they like to be recognized, it's important you follow through and recognize them in the way they prefer. Otherwise, staff may feel like you asked for their input, but then didn't act on it.

Manager Time Commitment
To implement: 20 minutes

Staff Time Commitment
To complete: 5-10 minutes

How to Use This Tool

1. **Customize our list of ways you can recognize staff.**

   Review the list of recognition options on the Recognition Preference Assessment on page 64.

   If you'd like to make any changes, visit advisory.com/hrac/2016/engagestaff to access an editable version of the form. Remove any options for recognition that aren't available, and add any additional ideas you have.

   Print one copy of the Recognition Preference Assessment for each team member.

2. **Ask staff to share their recognition preferences.**

   During the last 10 minutes of a team meeting, pass out the preference assessment to your staff.

   Explain the goal is to help you recognize staff's accomplishments in a way that's most meaningful for them (for example, some people love to be the center of attention at a team meeting and would appreciate public recognition, while that same recognition would make others want to run and hide).

   Encourage staff to complete the forms and collect them at the end of the meeting.

3. **Review staff's preferences to recognize them in a way that's meaningful to them.**

   Store the completed preference forms in an easily accessible location. When it is time to reward a staff member, look at their preference assessment to decide how to best recognize them.

   If you prefer to store materials electronically, create an Excel file and input the information from the forms into a single spreadsheet.

4. **Ask new staff to share their recognition preferences.**

   For new staff, share the preference assessment with them during your first check-in, and collect it a week later.

Source: HR Advancement Center interviews and analysis.

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Recognition Preference Assessment

ALL ABOUT YOU…
(This is optional: please share whatever information you feel comfortable sharing)

Name:_____

Date: _____ Employment Anniversary:_____

ABOUT YOU

Birthday (month/day only):_____ Hometown:_____

I AM MOST PROUD OF:

_____

_____

15 MINUTES OF FAME

I prefer to be recognized:
- ❑ Publicly
- ❑ Privately
- ❑ No preference

I appreciate recognition most when given by:
- ❑ Peers
- ❑ Patients/Internal Customers
- ❑ Managers
- ❑ Executives
- ❑ No preference

PLEASE CHECK FIVE ITEMS BELOW THAT YOU WOULD MOST ENJOY:

- ❑ Personal notes from manager
- ❑ Opportunities to attend seminars/workshops
- ❑ Food
    - • Favorite candy:_____
    - • Favorite snack:_____
- ❑ Flowers
- ❑ Movie tickets
- ❑ Lunch with manager
- ❑ Cafeteria voucher
- ❑ Name and photo displayed publicly in department
- ❑ Recognition in front of peers
- ❑ Extra time off
- ❑ Project opportunities

Source: HR Advancement Center interviews and analysis.

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Staff Input

We all want to feel heard.

When we don't have the opportunity to weigh-in on a decision that affects our work, it's frustrating. And when we do feel heard—when we have offered input on a decision or project—we are more likely to want to see it succeed.

As a manager, proactively asking your staff for input ensures they feel heard, share ideas, and increases the likelihood they are invested in the success of projects.

Your staff have first-hand experience about what's working well (and not so well) with current processes. Creating an avenue for input engages your staff and helps them share innovative suggestions.

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Increase Staff Input	🕐	👍👍
Collect actionable feedback	Idea Progress Board	🕐🕐🕐	👍👍👍
	Picklist of Ways to Involve Staff In Hiring	🕐🕐	👍

▶ Access these tools: **advisory.com/hrac/2016/engagestaff**

Quick Tips to Increase Staff Input

Here are five actions you can take on a daily basis to let staff know that you value their input:

1 Respond to voice mails and emails from staff as quickly as you can during business hours, even if it's just to tell staff you've received the message and will respond to them at a later point.

2 Write down questions staff ask that you do not know the answer to, and either commit to finding the answer or tell them who should be able to answer the questions.

3 Close the loop when you act on a staff member's idea—tell the staff member what you did. If appropriate, let your team know about the change and give credit to the staff member who raised the issue.

4 Give staff advance notice about when you'll be unavailable
Example: meetings or vacation

5 Inform staff when you advocate for them; take credit for problems you've solved.

Idea Progress Board

Goal
This tool helps you collect feedback from staff and show staff how you're using their ideas.

Manager Time Commitment
To implement: 30 minutes
To maintain: 5 to 10 minutes for discussion at change-of-shift or unit huddle

Staff Time Commitment
5 to 10 minutes for discussion at change-of-shift or unit huddle

How to Use This Tool

1. **Create an Idea Board.**

    a. **Hand-draw** a 2x2 grid on a whiteboard in your daily huddle area. Use the template on page 69 as a guide. Make sure you draw the grid big enough for one envelope to easily fit in each quadrant.

    b. **Tape** one envelope into each quadrant of the whiteboard. Each envelope should be big enough to store 8.5"x11" pieces of paper. (Make sure the envelopes don't cover the words in each quadrant, or write the corresponding quadrant label on each envelope.)

    c. **Tape** an envelope big enough to store 8.5"x11" pieces of paper on or below your whiteboard. Label it: New Ideas.

    d. **[Optional] Write** your team's top three priorities at the bottom of the whiteboard. You'll later use these as prompts for staff ideas. If you have trouble deciding on only three priorities, pick the ones where you particularly want staff buy-in or new ideas.

2. **Prepare to lead a training session on the Idea Board.**

    a. **Print** the New Idea Form on page 70 and Idea Triage Cheat Sheet on page 71. You'll need one copy of each per staff member, plus two extra.

    b. **Fill out** the New Idea Form for two sample ideas. You'll want to create an "Implement" and a "Do Not Pursue" example.

3. **Introduce the Idea Board to your staff in a quick training session.**

    a. **Use** the Facilitator Guide for an Initial Training Session on page 72-74.

4. **Once a week, take five minutes to prioritize new ideas with staff at change of shift.**

   These steps are a high-level overview of how to triage ideas in the moment. For more information on triaging ideas, review the Idea Triage Cheat Sheet on page 71.

   a. **Review** any New Idea Forms from the New Ideas envelope as a group. You'll want to ensure staff understand the new idea so they can easily triage it.

   b. **Decide** if the idea supports your team's top three priorities. If an idea does not align with your team's priorities, explain that this idea can still move forward but other ideas may take priority.

   c. **Decide** each new idea's impact and complexity. Use the Idea Triage Cheat Sheet as a guide. Then place the new idea in the appropriate Idea Board quadrant.

   d. **Decide** if you want to begin immediately working on an idea that is sorted into the "Implement" quadrant. Base this decision on how many projects are already underway and how much time your staff has.

   e. **Ask** for volunteers to "own" each new idea that the group decides they want to immediately work on.

5. **At each change of shift, take five minutes to discuss current projects.**

   a. **Review** all ideas that are currently underway.

   b. **Acknowledge** any completed ideas and remove them from the board. Keep a record of these completed ideas.

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How to Draw an Idea Board

Use this template to draw your own Idea Board. Make sure you draw the grid big enough for two 8.5"x11" pieces of paper to easily fit in each quadrant.

Idea Board

	Implement	Challenge
Benefit ↑		
	Possible	Do Not Pursue

Complexity →
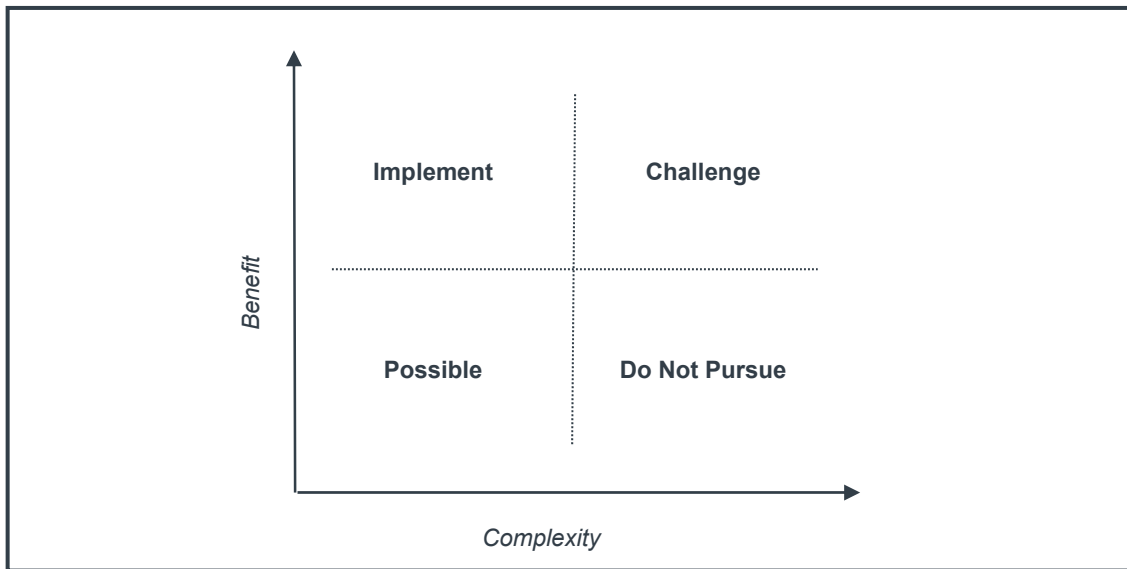
Optional Additions to Your Idea Board

Team Priorities	Things We're Working On
1 _____	1 _____
2 _____	2 _____
3 _____	3 _____
4 _____	4 _____

New Idea Form

Name _____   Date _____

Describe the problem.

_____

_____

_____

_____

_____

Why is it happening?

_____

_____

_____

_____

_____

How can we fix it?

_____

_____

_____

_____

_____

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Idea Triage Cheat Sheet

This cheat sheet will help you triage new ideas in two easy steps.

1. **Answer these questions to decide if the idea is complex and if it will benefit your team.**

   How complex is this idea to do?

☐ Yes	☐ No	Will it require a lot of time?
☐ Yes	☐ No	Will it require a lot of resources?
☐ Yes	☐ No	Will it require a lot of stakeholders?
☐ Yes	☐ No	Will it require organizational approval?

   How many times did you answer "yes"?

   0-1 times Low complexity
   2-3 times Medium complexity
   4 times High complexity

   How will this idea benefit your unit?

☐ Yes	☐ No	Does it align with team priorities?
☐ Yes	☐ No	Will it save time?
☐ Yes	☐ No	Will it improve quality or safety?
☐ Yes	☐ No	Will it engage staff?
☐ Yes	☐ No	Will it enhance patients' or customers' experience?

   How many times did you answer "yes"?

   0-1 times Low benefit
   2-3 times Medium benefit
   4+ times High benefit

2. **Use your answers to the questions above to sort the idea into the appropriate category.**
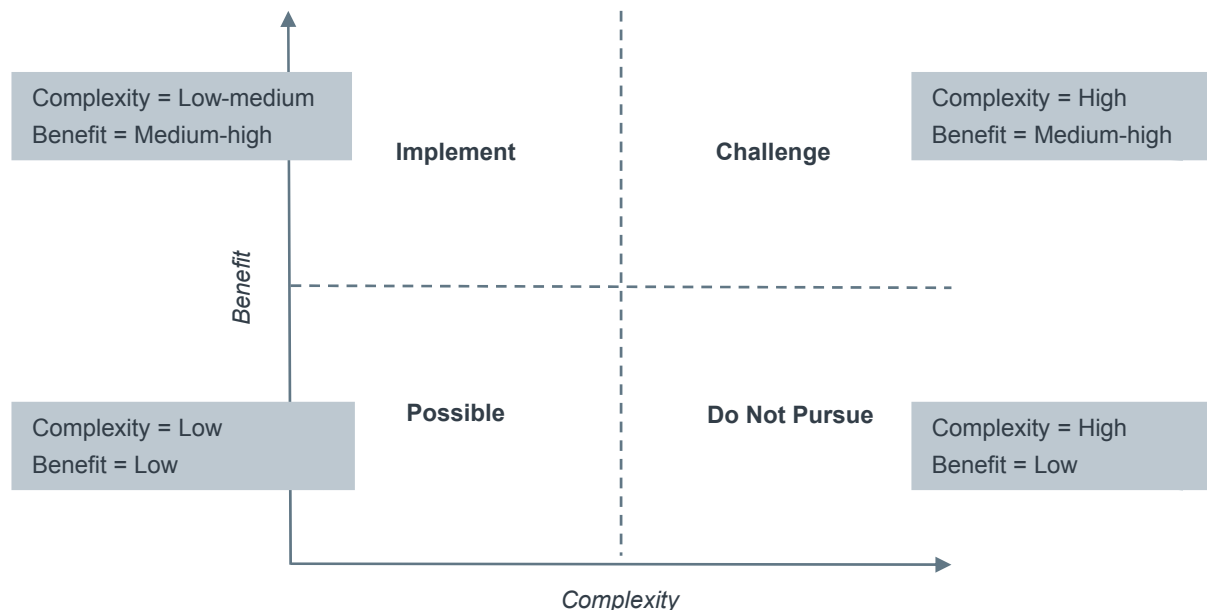
	Implement	Challenge	
Complexity = Low-medium Benefit = Medium-high			Complexity = High Benefit = Medium-high
	Possible	Do Not Pursue	
Complexity = Low Benefit = Low			Complexity = High Benefit = Low

   Benefit (vertical axis) · Complexity (horizontal axis)

Facilitator Guide for an Initial Training Session

This guide will help you introduce the Idea Board and triage process to your staff. Use the directions and scripting to lead a 30-minute training session with staff. We recommend one training per shift.

1. **Introduction**: 5 minutes

    Goal: Ensure participants understand the purpose and goals of the training.

    a. Tell participants why they are in a training.

        - *I brought you all together today to talk about how we can continue to improve our unit's performance. Some of our best ideas come from you. But sometimes it's hard to give you feedback and actionable next steps because we're all so busy.*

        - *To help, we're going to have a more structured way to collect, prioritize, and track new ideas. It's called an "Idea Board" and it will help ensure good ideas aren't lost, and that we follow through on projects. It will also help us spend our limited time on projects that we can accomplish and that will have the greatest positive impact.*

    b. Share the goals for the training.

        - *I have two goals for today's training. First, I'll introduce you to the idea behind an Idea Board and how it will help us quickly solve problems.*

        - *Second, I'll explain how our unit will use the Idea Board during our daily huddles.*

2. **Introduce the Idea Board:** 10 minutes

    Goal: Describe how the Idea Board and triage process works.

    a. Introduce the Idea Board. (Make sure staff can see the Idea Board as you introduce it.)

        - *To get started, I'm going to introduce the Idea Board and give an overview of how it will help us quickly prioritize new ideas and understand why we pursue some ideas and do not pursue others.*

        - *An Idea Board is a place to prioritize your ideas about improving the unit in a way everyone can see. During our daily huddles, we'll review each new idea posted on the board as a group and assign it to one of the four categories: Implement, Challenge, Possible, or Do Not Pursue. If the new idea is assigned to "Implement," then we can move forward with the idea.*

        - *I know this board looks complicated. Don't worry. I'm going to help you understand how it works by walking through the process step by step.*

    b. Explain the New Idea Form.

        - Distribute the handout called "New Idea Form."

        - *Let's get started. To use this board, we need your ideas about improving performance. For example, you may have an idea that will help improve* [state one of your team's priorities]. *To submit this idea, fill out the New Idea Form by describing the problem you observed, what is causing the problem, and your proposed solution. Then, put the form in the envelope labeled "New Ideas."*

        - *You can sign your name on the form, but you don't have to. I want you all to feel comfortable submitting your ideas.*

        - *We'll store additional copies of the form* [location where you'll store copies.]

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c. Describe the Idea Board.

- *Before we jump in to how to triage ideas, let's take a minute to better understand the four categories on the board.*

- *There are two considerations that help us decide which category to sort a new idea into: complexity and benefit. "Complexity" refers to how hard or easy a new idea will be to accomplish. For example, if a new idea requires organizational support and a lot of time and resources, it may be more complex than some other ideas. The other axis, "Benefit," means how much a new idea helps the unit. For example, if an idea supports our team priorities and enhances the patient experience, then it will have a high benefit to our team.*

- *Each time we review a new idea, we'll decide the complexity and benefit of the idea and then place it in the corresponding category.*
  - *If an idea is low-to-medium complexity and medium-high benefit, then it will go in the "Implement" category on the top left.*
  - *If an idea is low complexity and low benefit, then it will go in the "Possible" category on the bottom left.*
  - *If an idea is high complexity and medium-to-high benefit, then it will go in the "Challenge" category on the top right.*
  - *If an idea is high complexity and low benefit, then it will go in the "Do Not Pursue" category on the bottom right.*

d. Describe the Idea Triage Process.

- Distribute the handout called "Idea Triage Cheat Sheet."

- *As I mentioned, we'll review new ideas during our daily huddle and decide what category they belong in. This cheat sheet will help guide our idea review with two steps.*

- *First, we'll decide if a new idea is complex and if it will benefit our unit. On your handout, there are some questions to help us decide.*

- *Second, we'll select the best category based on the complexity and benefit. Again, the handout contains some guidance to help us do this. But, remember that this is a group discussion, so we'll use this cheat sheet as a guide but base our decision on the group discussion.*

- *If we put an idea in the "Do Not Pursue" category, we'll remove it from the board. If we put in the "Implement" category, we'll decide if we want to begin immediately working on it or not. We'll base this decision on the number of projects that are already underway and how much time we have. Remember, all ideas are valuable even if we don't prioritize them this time.*

e. Discuss the Tracking Process.

- *If we decide to pursue an "Implement" idea, I'll ask for a volunteer to "own" the idea. This person will oversee the project and update us on its progress during daily huddles.*

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3. **Closing and Next Steps:** 5 minutes or less

   a. Ask if anyone has initial feedback or questions. Then thank the group for their participation and discuss next steps.

   - *Thank you for your participation today. As a reminder, you can find the Idea Forms in* [location where you'll store copies]*. I encourage you to fill out a form when you have an idea, particularly if your idea addressed our unit priorities* [remind staff of your unit's top three priorities]*.*

   - *If you have any questions or feedback, please let me know. Starting* [date]*, we will use the Idea Board during daily huddles to help us better prioritize ideas. I look forward to hearing your great ideas!*

Picklist of Ways to Involve Staff in Hiring

Goal

This tool includes six ways to involve staff in the hiring process. Involving your staff in the process sends a clear message—you value their input in building a strong team. Equally important, staff who are involved in the hiring process are more likely to do their best to support new hires when they join your team.

Manager Time Commitment

To select tactic and introduce to staff: 30 minutes
To maintain: variable, depending on tactic

Staff Time Commitment

10 minutes to 1 hour depending on tactic

How to Use This Tool

1. **Review the Six Ways to Involve Staff in Hiring picklist on page 77. Select a tactic to involve your staff in the hiring process.**

   Here are two things to consider as you select a tactic:

   ❑ **Time:** Do your staff have the bandwidth to participate? Does involving them have the potential to overload and ultimately *disengage* them?

   ❑ **Scheduling:** Does the tactic require staff to be available at a particular time (e.g., give tour of unit after candidate interviews with hiring manager)?

2. **Decide how many, and which staff, you want to involve in the process.**

   Ask yourself these questions when deciding **how many** staff to involve in the process:

   ❑ **Time:** How much staff time do I want to dedicate to hiring decisions?

   ❑ **Training:** How much training will it take for me to involve staff?

   Ask yourself these questions when choosing **which** staff to involve in process:

   ❑ **Experience:** Does this staff member have strong knowledge of the unit and role?

   ❑ **Charisma:** Will this staff member interact with candidates in a warm and welcoming way?

   ❑ **Communication skills:** Can this staff member answer candidate questions clearly?

   ❑ **Relatability**: Does this staff member have a similar background to the candidate(s) I expect will apply for this position?

Source: HR Advancement Center interviews and analysis.

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3. **Invite selected staff members to participate in the hiring process in a brief in-person meeting.**

    Key points to cover include:

    ❑   Explain why the staff member(s) was selected to provide input on hiring decisions. Let them know you'd like to use this meeting to explain what is involved before they officially accept or decline the invitation.

    ❑   Describe what the staff member(s) will be expected to do, based on the tactic you've selected on the following page.

    ❑   Set your expectations regarding turnaround time for the staff member(s) to provide input.

    ❑   Answer any questions the staff member(s) has regarding their involvement and ask if they would like to accept the invitation to participate.

4. **Circle back with your staff three-six months later to gather feedback on their involvement with the hiring process.**

    You can do this during an in-person meeting, or via email. Ask your staff:

    ❑   Do you think your involvement with the hiring process is a good use of your time? Why or why not?

    ❑   Do you have suggestions for ways we could improve your current involvement with the hiring process?

    ❑   Would you like to continue to be involved in hiring in the future? If so, in what way?

5. **Review staff feedback and either refine your selected tactic as necessary, or select a new tactic from picklist.**

Source: HR Advancement Center interviews and analysis.

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Six Ways to Involve Staff in Hiring

Select one or more tactics to involve staff in the hiring process. The tactics are listed from least time-intensive for your staff to the most time-intensive. In particular, the first four tactics are straightforward, quick ways to involve staff—either on a one-time or ongoing basis. The last two tactics require a significant time investment from staff.

Ask Staff to:

PROVIDE SUGGESTIONS ABOUT SOURCING
When a new position opens on your unit, ask staff in the same or similar roles where to look for top-notch candidates (for example, local schools or professional associations).

SHARE FEEDBACK ON THE HIRING PROCESS
In either individual or group meetings, ask staff what they most enjoyed, and most disliked, about the hiring process at your organization.

REFER FAMILY, FRIEND, AND PAST COLLEAGUES
If applicable, remind your employees about the employee referral program. Talk with HR about running a campaign about the program to boost awareness.

POST ON SOCIAL MEDIA
Encourage staff to post open positions on their social media accounts. You can offer a small reward—such as a favorite snack or candy—to those who post positions.

CALL CANDIDATES
Ask a staff member to call final candidates between the initial phone screen and the final interview. Staff should express how excited they are for the candidate to interview on the unit, and answer any questions the candidate may have.

GIVE TOURS OF THE UNIT
Assign staff members to give candidates a tour of the unit when they come in for the final interview.

Keep in mind that involving staff in the hiring process may make the hiring process more cumbersome, and limit your ability to extend a timely offer to a qualified candidate. Setting clear timelines can help staff weigh in without holding up the process.

Source: HR Advancement Center interviews and analysis.

Stress and Burnout

We all feel stress about our work from time to time.
It's normal (and even healthy) to feel stress occasionally at work during a particularly busy time or in anticipation of an important upcoming event. But if we're constantly experiencing stress at work, we will eventually burn out.

As a manager, you can help create an environment where stress and burnout aren't the norm.
Stress can be contagious, so work to manage your own stress to avoid negatively impacting your team. Once you feel in control of your own stress level, proactively work to manage stressors that could be dragging down your team (such as a number of changes all happening in the same month).

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Reduce Stress and Burnout	🕐	👍👍
Assess yourself and your team	Individual Stress Assessment	🕐	👍👍
Avoid all changes happening at once	Change Calendar	🕐🕐	👍👍👍
Don't be the one leading endless meetings	Meeting Etiquette Reminders	🕐	👍👍

▶ Access these tools: **advisory.com/hrac/2016/engagestaff**

Quick Tips to Reduce Stress and Burnout

Here are four actions you can take on a daily basis to reduce your team's stress and burnout:

1 Stress can be contagious. Take care of yourself so your own stress level doesn't negatively impact your staff.

2 Schedule more frequent check-ins with staff who seem particularly overwhelmed.

3 Help your team prioritize what needs to get done first, and what can be left for later.

4 Acknowledge staff members' frustration with circumstances outside their control. Give them a safe place to vent beyond the earshot of patients and customers.

Individual Stress Assessment

Goal

This tool helps you identify how you typically cope with stress at work. It helps you become aware of your "default" stress reaction, so you can recognize it and react productively.

Manager Time Commitment

For self-assessment: 10 minutes
For team discussion: 20-30 minutes

Staff Time Commitment

For self-assessment: 10 minutes
For team discussion: 20-30 minutes

How to Use This Tool

1. **Complete the Individual Stress Assessment on the next page.**

   This exercise works best if you are honest with yourself. The answers are just for you.

2. **Consider sharing the assessment with your team during a staff meeting.**

   Talking points:

   ❑ Explain that we are predisposed to react to stress in a particular way. Identifying your default stress reaction is helpful, because you can then learn tactics that help you react productively to stress.

   ❑ Decide on a deadline to complete the self-assessment

   ❑ Tell staff to bring their completed self-assessment to your next team meeting, where you'll discuss your stress responses (but staff will be welcome to share as much—or as little—as they like)

3. **Lead a brief discussion about the stress assessment results at your next team meeting.**

   Use the following questions to prompt discussion among your staff:

   • Was there one particular stress reaction that you read and thought, "Yes, that sounds exactly like me!"? Which one?

   • What was your dominant stress response? Were you surprised to learn this about yourself?

   • As you read though the tactics that correspond to your dominant stress response, is there one you are going to commit to trying? Have you found there are other tactics that effectively help you deal with your stress?

   Don't push staff to share their answers if they'd prefer to keep them private.

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Individual Stress Assessment

*For each of the five questions, circle the response that sounds the **most** like you.*

1. When I'm stressed at work, I:
   a. Sleep more
   b. Closely manage my team's work
   c. Spend more time alone in and out of work
   d. Let problems linger and plan to figure them out later

2. When I'm stressed at work, I:
   a. Push difficult items to the bottom of my to-do list
   b. Put my personal priorities on hold to get more done at work
   c. Get distracted by what others are doing to cause me stress
   d. Doubt my decisions

3. When I'm stressed at work, I:
   a. Let problems linger and plan to figure them out later
   b. Lose sleep thinking about my stressors
   c. Vent to colleagues
   d. Replay situations over and over in my mind

4. When I'm stressed at work, I:
   a. Avoid colleagues who stress me out
   b. Push through with the task at hand despite feeling overwhelmed
   c. Wear my emotions on my sleeve
   d. Tend to blame myself for my stress

5. When I'm stressed at work, I:
   a. Indulge more in food, drinks, television, or internet browsing
   b. Keep thinking about work once I get home
   c. May feel impatient towards my co-workers
   d. Wish I could go back and do things over

See the next page to find your dominant stress response.

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Tally your answers on the previous page, and find your dominant stress response. Once you identify the category that corresponds to you, read through the listed tactics and check one that you plan to try out in the future.

Total As_____   Total Bs_____   Total Cs_____   Total Ds_____

Mostly As

A

Your dominant stress response is AVOIDANCE.

If you tend to use avoidance, you try to distract yourself from your stressor. But the more you try to avoid your stress, the more it can build.

To Overcome Avoidance: Engage more actively with your stressor and negative feelings in order to process them.

Tactics to Engage with Your Stressors:

❑ **Break it up.** Pick a task you have been putting off and break it into three smaller steps to help you get started. Schedule time to complete each smaller task.

❑ **Reward yourself.** Take a minute to brainstorm a small way you can reward yourself for making progress against something that is stressful.

❑ **Spread the word.** When you have identified a goal you want to achieve, share it with the people around you and ask them to keep you accountable to achieve it.

Mostly Bs

B

Your dominant stress response is OBSESSION.

If you tend to use obsession, you spend all of your time, energy, and resources on your stressor. This is not sustainable in the long-term, and puts you at risk of burnout.

To Overcome Obsession: Try to be more measured about your involvement with your stressor so that you can recharge and refocus.

Tactics to Disengage from Your Stressors:

❑ **Give yourself a time limit.** To allocate your time and energy more effectively, commit to working on a single task for a specific amount of time. Then move on to something else.

❑ **Take a break.** Use your cell phone timer or a calendar reminder to schedule quick breaks throughout the day. When you do take a break, actually get up from your workplace and get a change of scenery.

❑ **Balance your attention.** Identify a fun hobby or activity that requires your full attention. Commit to participating in this activity at least twice a week.

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Mostly Cs

C

Your dominant stress response is COMPLAINT.

If you tend to use complaint, you externalize stress and often project it onto other people. Continued complaint can result in a negative mindset that also impacts team morale.

To Overcome Complaint: Get a more objective view of your situation and the people around you.

Tactics to Look at Your Stressors Objectively

❑ **Pause first.** Institute a five-second rule before you speak or react to a stressful circumstance, pausing to check if your first assumptions are fair, and brainstorming alternatives.

❑ **Share the blame.** When something goes wrong, identify a small action (a gesture, a delay, a comment) that you contributed to the problem.

❑ **Check your language.** Be mindful of the language you use. Try to catch yourself using negative or hyperbolic words and replace them with something more objective.

Mostly Ds

D

Your dominant stress response is SELF-DOUBT.

If you tend to use self-doubt, you try to rationalize your stress by pinpointing what you did wrong. You likely overthink or replay negative events, which can prevent you from moving forward.

To Overcome Self-Doubt: Find more forgiving and compassionate ways to handle your emotions and stress.

Tactics to Give Yourself the Benefit of the Doubt

❑ **Turn a negative into a positive.** Try not to dwell on mistakes you've made. Instead, make a conscious effort to identify two things you learned from the experience.

❑ **Get a second opinion.** Test your concerns by saying them out loud to someone you trust. Ask if they see any holes in your logic, or if your interpretation makes sense.

❑ **Use positive self-talk.** Challenge the negative thoughts you have about yourself. Think of three positive attributes about yourself to remember whenever you are hard on yourself.

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Change Calendar

Goal

This tool helps you schedule and space out changes across the year. It will help you avoid unnecessary overlap of projects to make sure you and staff can dedicate the right amount of time and effort to implementing any initiative effectively.

Manager Time Commitment

To implement: 1 hour to create your team's Change Calendar

To maintain: 20 minutes once a month to review and update your team's Change Calendar

Staff Time Commitment

None

How to Use This Tool

1. **Gather the necessary information.**

   a. **List** all the system-, facility-, and department-driven changes coming up in the next 12 months that will affect staff on your team.

   b. **List** all the team-based improvement initiatives you plan to introduce in the next 12 months.

2. **Create your Change Calendar.**

   a. **Download** the Excel-based Unit Change Calendar Template at **advisory.com/hrac/2016/engagestaff.**

   Unit Change Calendar.xlsx

   b. **Fill in** the system-, facility-, and department-driven changes from your list in the rows next to "Department- or Organization-Driven Changes." Then **fill in** the start and end dates (if they are known) next to each change.

   c. **Color in** the cells that correspond with the dates of these changes. For example, if a change will roll out on February 1st and finish by March 1st, color in the cells beneath the four weeks in February.

   d. **Fill in** the team-driven initiatives or projects from your list in the rows next to "Team-Driven Changes." Then **fill in** your proposed start and end dates next to each initiative or project, and **color in** the cells that correspond with the dates of these changes.

   e. **[Optional] Color code** each change using the Color Code Key in the third tab of the Excel document.

Check out our example Change Calendar in the second tab of the Excel document for more guidance.

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3. **Identify and troubleshoot big disruption periods.**

   a. **[If a team-driven change overlaps with or two or more moderately disruptive or very disruptive changes] Select the statement below** that best describes your situation, and use the corresponding next steps.

   > If you're using the Color Code Key, these will be yellow or red.

Statement	Example	Next Steps
☐ Your timeline for implementation is flexible.	A new initiative to recognize peers with handwritten "Kudos cards."	**Reschedule the team-driven initiative.** This may mean shifting it forward or back one or two weeks, or rescheduling it for another month.
☐ You need to implement this change in a certain time frame.	A training series in preparation for upcoming hospital-wide EMR go-live date.	**Talk to your manager** about how to prioritize, or about whether it's possible to adjust the timing of a department- or organization-driven change. **Bring the following items to this conversation:** 1. A copy of your Change Calendar. 2. Your recommendation on which change you think should be rescheduled and why. 3. Two or three suggestions for how to adjust the scheduled timing for these changes.

4. **Review and update the calendar every month.**

   a. **Set a recurring calendar hold** once a month for 20 minutes to review and update your Change Calendar.

   b. **Use** this time to:

   • **Add** new changes or projects to your calendar.

   • **Adjust** timing for upcoming changes based on your current priorities and direction you receive from leaders.

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Meeting Etiquette Reminders

Goal
This tool helps you avoid hosting unproductive meetings to ensure you are protecting your time and your staff's time.

Manager Time Commitment
To review: 10 minutes

Staff Time Commitment
None

How to Use This Tool

1. **Review the "Anatomy of a Great Meeting" Infographic on the next page and apply the principles as you lead meetings with your staff.**

2. **Print the infographic and hang a copy in each regular meeting room to help remind you and your team about the principles of effective management**

   You can download the PDF by going to www.advisory.com/hrac/2016/engagestaff.

3. **Hang a clock in every regular meeting room to help everyone keep track of time.**

ANATOMY OF A GREAT Meeting

STOP — Before you hit "send" on your Outlook meeting organizer CONSIDER
...is a meeting the best forum for what is needed?

Do you need a question answered?	Are there difficult or sensitive issues?	Is it a recurring meeting with no news or updates?
PICK UP THE PHONE	MEET ONE-ON-ONE	CANCEL

BEFORE

Determine
structure and purpose

- Who needs to attend?
- What is the objective?
- How much time is needed?
- What preparation will help?
- What is your role?

1	2	3
Are you there to push a group to a decision?	Are you responsible for making a decision?	Are you seeking information?

Communicate
in advance

➡ Develop a written agenda; assign owners to each item

➡ Send agenda and supporting materials in advance

➡ Set expectations for in-person or video attendance

➡ Set context/framing for meeting
(Why is this meeting being held?)

by email if possible   by phone if needed to engage key stakeholders

DURING

1	2	3
Start/Finish on time	Assign a note-taker and a time-keeper	Provide context/framing at the outset *(Why are we here?)*

4 Manage the discussion

Making an ask?
Do it early, be specific
"To reach our objective, our team will need a piece of collateral to communicate the new vision."

Discussion wandering?
Bring it back to topic
"Great discussion, but I want to keep us focused on the issue at hand."

Want attendees to stay engaged?
Use active listening strategies
"I'm aware of the impact this has on your team."

Off-topic ideas coming up?
Put them in a parking lot
"Good point. Can we come back to it next time?"

People talking too long?
Set time limits
"I've asked each person to take no longer than 5 minutes to present their case."

Want attendees to feel invested in the outcome?
Acknowledge their mind-sets and interests verbally
"What I'm hearing you say is..."

5	6	7
Follow the agenda	Review next steps and establish accountability *(Who will do what by when?)*	End early when possible to enable timely arrival at next appointment
a. Set goals and objectives for the meeting and for each agenda item b. Establish owners for agenda items		

AFTER

FOLLOW-UP
➡ Send brief notes to meeting attendees and people who were absent, focusing on:

- Decisions made
- Action items and owners

DEBRIEF
➡ Review what worked and didn't and note that for next time

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Source: Advisory Board

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Teamwork

We all prefer to work on high-functioning teams where team members can rely on each other.
Great teams can accomplish much more than individuals working on their own, and effective collaboration in the workplace promotes a sense of community.

As a manager, you set the tone for your team.
Promoting teamwork will help your staff build strong relationships with each other that will help them weather periods of intense change or unexpected work.

Goal	Tool	Time	Impact
Brush up on the basics	Quick Tips to Improve Your Staff's Teamwork	🕐	👍👍
Help your team get to know each other	Picklist of Interactive Team Building Games	🕐	👍
Promote peer-to-peer accountability	Peer Rounding Guide	🕐 🕐 🕐	👍👍👍

► Access these tools: **advisory.com/hrac/2016/engagestaff**

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Quick Tips to Improve Your Staff's Teamwork

Here are three actions you can take on a daily basis to strengthen your staff's teamwork:

1 Ask new team members to introduce themselves during their first team meeting.

2 Spend 5 or 10 minutes once a month doing an interactive icebreaker during a team meeting.

3 Publicly recognize staff for demonstrating strong teamwork.

Picklist of Interactive Team Building Games

Goal
This tool helps you create structured opportunities for your staff to interact and get to know each other. Think of this picklist as an "idea bank" of ice breakers designed to make meetings more interactive and engaging for your team.

Manager Time Commitment
To prepare: 5-15 minutes
To lead: 5-20 minutes

Staff Time Commitment
To participate: 5-20 minutes

How to Use This Tool

1. **Review the Picklist of Interactive Team Building Games on the next page. Select a game you think your team would enjoy.**

2. **Gather the supplies listed alongside the game you pick.**

3. **Kick off your next team meeting with the game you select.**

Source: HR Advancement Center interviews and analysis.

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Picklist of Interactive Team Building Games

The games are ranked in order of how much they require your team to get out of their comfort zones. The more comfortable games are at the top of the list, and the more challenging ones are at the bottom.

Game Title	Description	Materials	Recommended Time
Name-Game Ball Toss	Staff sit in a circle and pass around a ball. Staff say their own name, and the name of the person they are passing to, before each throw.	Small object to throw (e.g., rubber ball or beanbag)	5 minutes
Two Truths and a Lie	Each staff member thinks of two true facts and one false fact about themselves. (For example, "I grew up in Oregon," "I was a girl scout," and "I once received first place in a judo competition." They share all three facts with the group, and then the group tries to guess which fact is false. Once the group guesses correctly, another staff member takes a turn.	None	10 minutes
Finding Common/ Opposite Ground	Set a timer for 5 minutes. Staff mingle with one another and have one-on-one conversations. As they talk, each pair needs to identify one thing they have in common, and one thing they don't have in common. Examples include: college, favorite ice cream flavor, hometown. Staff write down the "common" and "opposite" ground with each person they talk to. The goal is to have conversations with as many people as possible, and the staff member who talks to the most people wins!	Pens and paper	10 minutes
Pictionary	In advance, pick a theme (such as health care terms, songs, or famous people) and write 20-30 related terms on small pieces of paper. Put the pieces of paper in a small container. To play, select one person to be the "artist." The artist picks a piece of paper from the container, and using drawing only (no words!) must try to get everyone else to guess the term. Whoever guesses correctly steps up as the next artist.	Small pieces of paper, a small container, pens and paper (or a whiteboard and whiteboard markers)	15 minutes
Human Bingo	Give participants a "Human Bingo" sheet (see materials for details). Staff mingle, and try to find someone who meets the criteria on the bingo square. The first person who gets a complete row shouts "Bingo!" and has to read off their names. Feel free to play several rounds, or try blackout!	Bingo sheets (make your own, or customize our pre-made bingo sheet on page 93), pens	10 minutes
Tarp Challenge	Split the group into smaller groups of 6-10 people. Give each group a small mat or tarp and give them the following ground rules: groups must turn over the mat from one side to the other, while everyone is standing on it. If anyone touches the ground, the team has to start over.	Tarp	15 minutes

Source: HR Advancement Center.

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Human Bingo

Speaks at least two languages	Is the oldest sibling	Owns a pair of red socks	Can curl their tongue
Has a pet	Has been working here for less than one year	Plays an instrument	Has tried surfing
Doesn't drink coffee	Read a book within the last month	Has been working here for five or more years	Likes to sing
Has an older brother	Has a January birthday	Plays on a sports team	Has met someone famous

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Peer Rounding Guide

Goal

This tool helps you create structured opportunities for staff to assess performance in pairs. You select an outcome and set clear criteria to evaluate performance. Pairs of staff have the opportunity to hold each other accountable for achieving the outcome—improving both teamwork and performance.

Manager Time Commitment

To implement: 90 minutes
To maintain: 15 minutes to review submitted forms

Staff Time Commitment

30 minutes per assessment

How to Use This Tool

1. **Identify a group of staff that you want to work with to build a sense of teamwork and mutual accountability.**

   Peer rounding works well with both clinical and nonclinical staff.

   You might choose to implement peer rounding with your whole team, or with a smaller group of staff, such as newer, less experienced staff.

2. **Identify an outcome that this group of staff is accountable for.**

   Examples:

   ❑ **Nursing Assistants**: room cleanliness

   ❑ **Nurses**: pressure ulcer staging score

   ❑ **Call Center Staff**: quality customer service on calls

   ❑ **Billing Staff:** thorough documentation

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3. **Identify an opportunity for staff to assess performance on the selected outcome in pairs.**

    For clinical staff, this opportunity often presents itself during shift transitions—the on-coming and off-going staff members can work together to evaluate the outcome.

    Examples:

    - **Nursing Assistants:** On-coming and off-going nursing assistants inspect patient rooms together to ensure all tasks were completed during the previous shift.

    - **Nurses:** On-coming and off-going nurses assess patient's skin together, and come to a consensus on pressure ulcer staging score.

    For nonclinical staff, they may be able to evaluate each other's work on the same shift or review already-completed work.

    Examples:

    - **Call center staff:** on-duty staff listen to samples of peer's incoming calls and provide feedback on customer service.

    - **Billing staff:** on-duty staff audit random sample of each other's claims for documentation completeness and adherence to policies and procedures.

    In addition to improving teamwork and accountability, peer rounding can also improve performance on outcomes (such as cleaner rooms, more accurate pressure ulcer staging scores, more consistent call center answers, or more thorough financial documentation in the examples described above).

4. **Identify a set of well-defined criteria for staff to use during collaborative assessments of performance, and customize the Peer Rounding Form on page 97.**

    The clearer the criteria, the more focused the peer discussion will be.

    For example, see the Sample Completed Peer Rounding Form on page 98 for on-coming and off-going nursing assistants to use to conduct an assessment of room cleanliness together.

    Customize your own Peer Rounding Form to include:

    ❑ Instructions for when the form should be completed

    ❑ The specific criteria to evaluate

    ❑ Line for each staff member to sign and date the form

    ❑ Instructions for where staff should turn in the completed form

5. **Decide how to pair staff.**

    The most logical pairing will depend on your team and the outcome you have selected.

    - For clinical staff, it may make sense to pair staff based on patient assignment, or on-going/ off-going shifts.

    - For nonclinical staff, you may decide to randomly assign pairs, or base pairings on tenure (for example, pairing newer and more experienced staff).

6. **Introduce the pair-based assessments to staff at your next staff meeting.**

   Talking Points:

   ❑ Describe the outcome you selected and how the team is currently performing on that outcome

   ❑ Explain staff will assess this outcome in pairs during select times (for example, during change of shift or during a designated time each month). The goal is to help each other ensure all the necessary steps have been taken to reach the outcome

   ❑ Distribute the Peer Rounding Form you created to each staff member

   ❑ Talk through the specific criteria on the form

   ❑ Tell staff how they will be paired together

   ❑ Tell staff where they can find the forms, and where and when they should turn in the forms

   ❑ Explain that staff will be held jointly responsible to turn in the completed form on time

7. **Collect peer rounding forms on a regular basis.**

8. **Review the forms, and ensure all staff are participating in a thorough and timely manner.**

   If a staff pair is not completing the assessments, follow up with them either in-person or via email to remind them to complete the forms.

Peer Rounding Form

Each pair of staff is responsible for completing this form by [time]. Completed forms should be turned in [location]. Thank you!

Assessment Completed By:

Name: _____ **Date:** _____

Name: _____ **Date:** _____

Items to Check	Y=Yes, N=No, N/A=not applicable
Patient white board updated	Y

Comments

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Sample Completed Peer Rounding Form

Y=Yes   N=No   N/A=Not applicable

To be completed by each assistant, for each shift. Please leave in [location]. Thanks!

Items to Check	Room _____	Room _____	Room _____	Room _____
Dirty linens				
Clean linen stored in rooms				
Meal trays				
Used paper cups				
Trashcans emptied				
Number of chairs at bedside				
Isolation box stocked				
Water pitcher full				
Commode/urinal emptied				
Comments				

ON-COMING assistant starting shift:_____ Date:_____

OFF-GOING assistant completing shift:_____ Date:_____