

**Primer for Home Health
Organizational Culture**

**Organizational
Culture
Workbook
Part II**

**This workbook is to be used after completion of Workbook I for
Teamwork, Communication, Care Coordination and/or
Leadership**

This workbook has been developed for home health agencies working
with their Quality Improvement Organization (QIO) to improve
organizational culture during the QIO 8th Scope of Work
(August 2005 – July 2008)

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Exploring Home Health Organizational Culture

Welcome to Organizational Culture Workbook Part II!

The introduction and groundwork for improvement in organizational culture has already occurred at your home health agency. Is this work making an impact at your agency? Does your staff recognize that something is happening? Has there been open discussion about organizational culture processes? Organizational Workbook Part II should help you solidify your agency's fundamental practices and move toward the goal of continuous improvement with organizational culture.

This workbook is a “hands on” tool to accompany the *Organizational Culture in Home Health Guides* (Delmarva Foundation for Medical Care, Quality Insights of Pennsylvania, 2006). Home health agencies will be able to utilize this workbook to take a step-by-step approach to understanding and refining the organizational culture within their agency.

A quick background review is important before continuing this process. The organizational culture change model showcased in the workbook is the **Quality Capability Model**, which was developed specifically for home health. This model is a staged approach to quality improvement in which the stages must occur sequentially. Mastery at an earlier stage is a requirement for success at a later stage. This Organizational Culture Workbook Part II is a primer to assist home health agencies in working sequentially through the developmental stages of organizational culture change.

This workbook continues with the four developmental stages of organizational culture change described in detail in the *Organizational Culture in Home Health* series:

Stage I: Initial Stage

Stage II: Modeled Stage

Stage III: Managed Stage

Stage IV: Optimized Stage

The initial primer, Workbook Part I, was domain-specific for teamwork, communication, care coordination and leadership, and should be completed before initiating Workbook Part II. Organizational Culture Workbook Part II is not domain-specific. The activities in Workbook Part II will apply to all domains. The activities in this workbook are geared so that any resulting improvements will benefit all culture domains.

The workbooks use the icons of a larvae, caterpillar, cocoon, and butterfly to demonstrate the stage of development.

Workbook I focused on the initial stage and ended with an introduction of Stage II, the Modeled Stage. A review of the stages...

Stage I: Initial Stage – Build a Foundation for Culture



The challenge at the Initial Stage is to move the organization from performance that is based largely on the effort of dedicated individuals to performance that follows a model of action. Building a foundation for culture starts with having a clear, shared concept of the role of organizational culture in care delivery, supported and endorsed by the organization. It starts with promotion of culture and progresses to develop methods and systems to make consistent quality collaboration possible.

Stage II: Modeled Stage



The challenge at the Modeled Stage is to build upon the models that have been established during the Initial Stage by implementing the processes required by the model. Systems are discussed and established to recognize and reward staff members' skills and efforts to promote quality. It starts with basic compensation and staff assessment systems and progresses to systematically identifying key team skills and promoting the development and enhancement of those skills.

Stage III: Managed Stage



At the managed stage, the organization is managing from a model and has established consistent performance. The challenge at the Managed Stage is to implement methods for improving performance and to integrate those methods into the management of the organization. Shaping the workforce starts with clarity about the workforce requirements and then developing the staffing, training and development methods needed to create an effective organization.

Stage IV: Optimized Stage



At the optimized stage, the organization has integrated performance improvement into its management practices and has established a team culture of feedback and accountability. The challenge is to sustain high quality. Developing capabilities refers to what is known as institutionalization in the Capability Maturity Model Framework. Institutionalization is absolutely necessary to sustained performance. It includes the organizational capacity to recognize core competencies and systematically promote the development of these competencies.

How to Use This Workbook

The Primer for Home Health Organizational Culture: Workbook Part II was created to assist a home health agency in understanding the basic concepts of home health organizational culture change and to implement strategies to assist their organization in achieving higher stages of organizational development. This workbook continues the approach to home health organizational culture that was introduced in the Workbook Part I series (Teamwork, Communication, Care Coordination and Leadership). It uses a “notebook” approach to assessing culture and planning for improvements.

Each module in this workbook is devised to be used for approximately 2.0-2.5 hour team meetings by the home health agency’s organizational culture team. Additionally, the Intervention Actions that are determined by the Organizational Culture Team in the agency will take more time than the meeting time allotted. Home health agencies are encouraged to finish each module before moving to the next module. Defining a “finished” module will be different for each home health agency, as different agencies will take varied approaches to implementing changes. Some approaches will be more complex and time consuming than others. Choose what works best for your agency.

The Quality Improvement Organization (QIO) in your state or territory has been educated in these materials and is prepared to offer your agency technical assistance throughout your organizational culture change project.

Refer to Workbook Part I for the prework checklist, the organizational plan of action, baseline survey and remeasurement survey results and other information that may need reviewed by the team lead and/or team. All sections of the plan of action have been initiated while completing Modules 1-5. Revision and updating of the plan will occur with this workbook.

This workbook is designed to follow Workbook I (Teamwork, Communication, Care Coordination and Leadership). These are located on MedQIC at www.medqic.org/hh, click on Organizational Culture.

Icon Reference for Workbook II:



Tip:

Indicates a tip. Team should read tips and incorporate them as they proceed through the workbook.



Checkpoint:

Indicates a checkpoint. Team should review list of items and evaluate their agency's performance. Use these points to plan your next strategy.



Documentation:

This clipboard icon will be used to help the Organizational Culture Team identify areas where documentation is required throughout this workbook and on the organizational culture plan of action (see Workbook I).



Success Story:

Indicates a success story, or practical application. All of the applications are true stories of home health agency strategies of improving organizational culture in their workplace.



Pre-Work Checklist

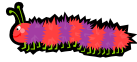
- Home health agency has completed Home Health Quality Culture Survey (Baseline).
- Home health agency completed Workbook I.
- Home health agency to complete Home Health Quality Culture Survey - (Remeasurement). Contact QIO for survey results.
- Review Home Health Culture Survey - Remeasurement findings and discuss with team/staff (with assistance from your QIO). Remeasurement survey results may be filed in Workbook I. There is a built-in placeholder for remeasurement responses.
- Determine meeting date for first post-survey meeting allowing 1.5 to 2.0 hours for this initial meeting.
- Team Lead to discuss methods for conducting the initial meeting with the QIO representative.
- Download this workbook (Part II) from www.medqic.org and distribute to all Organizational Culture Team members.
- DO NOT pre-schedule all meetings. The meeting schedule for each Organizational Culture Meeting should be determined at the conclusion of each meeting as the Intervention Actions determined at each meeting may take time to complete. Each module should be completed before moving to the next module.



Good Luck!!!

**You and your team are continuing a rewarding journey in
home health quality improvement!!!**

Module 6: Promoting Competencies



Organizational Culture Stage: Modeled



“The measure of success is not whether you have a tough problem to deal with, but whether it is the same problem you had last year.”

– John Foster Dulles

Meeting Date:

Attendees:

Objectives for Module 6:

1. The Organizational Culture Team will review progress with organizational culture plan of action.
 2. The Organizational Culture Team will implement processes to support change.
 3. The Organizational Culture Team will discuss and initiate revisions to plan of action.
-

Activities for Module 6

Estimated time for completion of Module 6 is 2-2.5 hours.

- Activity #1 – Review progress with Workbook I and identify key essential changes.
(Approximate time: 60 minutes)
 - Activity #2 – Plan implementation of practices to support continued change.
(Approximate time: 60 minutes)
 - Activity #3 – Document problems and/or strengths and plan Intervention Actions.
(Approximate time: 30 minutes)
-

Module 6 – Promoting Competencies

Activity #1: Progress with Organizational Culture Plan of Action: Identify Key Changes

Approximate time: 60 minutes

Activity Description: Review Organizational Culture Plan of Action.

Discussion: Team discusses progress and identifies successful changes. Team Lead will guide team through discussion questions.

Documentation: Use discussion questions and table to summarize changes and identify successes. Space is provided for notes.



Team Discussion: (The purpose of the following activities is an in-depth review to evaluate agency progress with organizational culture change. While this may seem tedious, it is an essential activity before moving to more expansive and encompassing actions.)

1. Was vision for organizational culture identified?

Suggestion: Refer to Module 1 of Workbook I.

2. Has the culture plan of action identified interventions to achieve vision?

3. Are there specific situations the team can identify which demonstrate the organization's vision?

Suggestion: Have a team discussion. Do members easily recall instances that reflect leadership or staff's understanding of the vision?

4. Was a model or system identified for the agency?
Suggestion: See Modules 2 and 4 of Workbook Part I. (This may be an “ideal team,” care coordination system, communication model or leadership roles.)

5. Are all employees aware of the model or system identified for the agency?
Suggestion: See Modules 2 and 4 of Workbook Part I. Have staff, management and administration had education on the model or system? Have specific activities been completed to educate all staff on model or system?

6. Has a reward and recognition program been established to support organizational culture change?
Suggestion: See Module 3 Workbook Part I. Does your agency have a recognizable program of reward and recognition? Have individual staff members been recognized? Are teams or groups recognized?

7. If so, could staff verbalize what the reward program is?
Suggestion: Have team members randomly ask staff about the agency’s reward/recognition program. Evaluate feedback.

8. Has the team completed any measurement of organizational culture performance?
Suggestion: See Module 5 of Workbook Part I.

9. List some specific activities used to measure performance: (Both individual and team)
Suggestion: Activities may include staff discussion at team meetings, surveys, polling staff, etc.

10. Ask team to review results from Home Health Culture Survey - Remeasurement. Are results surprising? Discuss the results with team and staff.
Suggestion: Record results in Workbook I. Compare to initial survey results.



Success Story:

Quality Home Health Services in Pittsburgh, Pa. was surprised at the results of their culture surveys. They were expecting communication to be the area they needed to focus on, but teamwork ended up as their weakest culture domain. “We held our first meeting in conjunction with the workbook from Quality Insights and came to the conclusion that we focus a lot on treating our patients well... but forget those aspects of internal culture,” shared Dawn Catalano, Administrator.

Having completed the activities in the teamwork workbook, Dawn and Beth DiGregory, Clinical Coordinator, began to look at programs they could use to improve teamwork within the agency. They chose the FISH! program, a teamwork philosophy based on the Seattle fish market, because it relates “very well to how health care professionals think,” said Dawn. “The concepts lend themselves to the personality of the typical health care worker.”


FISH! focuses on four major principles: Be There, Play, Make Their Day, and Choose Your Attitude. These principles were then related to home care. “Incorporating play into your work; taking the time to make each other’s day, as we do for our patients; choosing your attitude and how that can make a difference in your day, realizing how that carries over into patient care,” are all important, Dawn explained. “If we focus more on the internal environment here and if we all feel better about things and better about ourselves that will ultimately affect our patients.”

More information on the FISH! program can be found at www.charthouse.com.



Evaluate the agency organizational culture plan of action in the following table. List best practices (or interventions), briefly describe how the change was made and monitored. Evaluate if the change was successful and if further action is needed. This should help your team identify issues that are resolved and/or issues that may need reinforcement.

POA EVALUATION

Identified Intervention (Best Practice OR Intervention)	Specify Change Initiated	Monitored	Identified as Successful		Further action needed?
			Check Yes	or  No	



Tip: Include Member from Human Resources

Module 6 has begun with a review of the POA, but as the workbook progresses, activities will delve into issues that concern human resources. This may be good time to evaluate the members of the organizational culture team. Is there a member of the agency human resources department or a manager who is closely involved in hiring, orienting and benefit evaluation on the organizational culture team? It is highly recommended that someone concerned with human resources be involved. The progression through organizational culture will focus on hiring, orienting and retaining quality staff.

Discussion Notes (optional):

Module 6 – Promoting Competencies (continued)

Activity #2: Identify Practices to Support Organizational Culture Changes and Competencies

Approximate time: 60 minutes

Activity Description: Read following article: *Straight Talk* from www.holtz.com/index.php?module=pagemaster&PAGE_user_op=view_page&PAGE_id=21 and discuss.

Straight Talk

by Shel Holtz

As a rule, companies commit fewer resources to employee communications than any other communication function. Leaders tend to take other audiences – the media, investors, government, customers, and consumers – more seriously. But while companies must communicate effectively with these audiences, employees represent a company’s single most important constituent group.

Leaders in many organizations relegate internal communications to the back of the line based on the belief that because they are paid, employees should automatically march in lock-step with organizational priorities, strategies and initiatives. Because employees have their own self-interest to think of – promotions and pay raises at best, not getting fired at least – communication resources are best directed at other critical audiences that aren’t so inherently supportive of the company’s efforts.

Overwhelming evidence suggests the contrary. Companies that improve the effectiveness of their internal communications experience a related increase in their market value. According to a study conducted by the human resources consulting firm Watson Wyatt Worldwide, organizations that communicated most effectively with employees experienced a return to shareholders of 26%. Those organizations that communicated least effectively produced a -15% return. That’s a 41% swing in returns between companies that communicate well and those that don’t.

What makes employees tick

Effective internal communication is not a matter of slick publications or good-looking intranets. These are communication tactics that can facilitate the flow of information that ultimately should improve employees’ commitment to the company’s goals and objectives. Employees decide whether they will commit their energy and effort to a company based on four factors. These factors must underlie any effort organizations make to communicate with their workers.

Trust – The degree to which employees trust the company’s leadership is the single biggest contributor to employee commitment, according to a variety of studies. A study by the International Association of Business Communicators (IABC) found the most important

elements of trust, as far as employees are concerned, include management that demonstrates a concern for employees, openness and honesty, and walking the talk. Three-year returns to shareholders are considerably higher at companies where employees trust the company's leaders, according to one study.

Role Knowledge – Employees routinely hear broad, high-level pronouncements from management about strategy, goals, mission, vision, values, and a host of other issues. Equally frequently, they shrug off such missives because nobody has explained the link between the big-picture message and the day-to-day work they do. Somebody needs to translate these top-level communiqués in order to make them meaningful at the level where work is done. Such translation creates employee “line of sight.” That is, employees see how their actions affect the company's ability to achieve its big-picture goals. Shareholder returns are higher at companies where employees understand the connection between the organizations' objectives and the work they do.

Involvement – Employees are not content to sit back and let others make decisions that will affect them. In a world where knowledge is the most important element of production, employees believe they know more about their jobs and how they contribute to the bottom line than management does—and they're usually right! Thus, employees believe their input should be sought and incorporated into such decisions.

A connection to the marketplace – Employees who perform their work in a vacuum are usually surprised by change, resulting in resistance and, frequently, failure. On the other hand, employees who are well connected to the factors that drive company change not only are prepared for change, they can initiate it. Companies need to promote business literacy among their employees, not just so they can read and understand the annual report, but so they can recognize the impact the economy, customers and competition have on the organization.

Making It Happen

Sadly, too many executives believe communication is a soft function, one that requires few special skills beyond the tactical ability to produce a brochure or keep a Web site up to date. After all, while it may take an engineer to design a widget or an accountant to balance the books, everybody communicates, so how hard can it be? One Fortune 500 president told his top internal communicator, “I know exactly which three administrative assistants to talk to if I want a message to spread through the entire organization within a day.”

Communication is not just about spreading a message. Ultimately, it is about influencing employees' actions. The organization wants something from its workers. In general, companies want employees to support the strategy and contribute to the bottom line while embracing and reflecting the organization's values. In the shorter term, the company wants employees to embrace new initiatives (e.g., quality improvement, one company, customer satisfaction), adapt quickly to a reorganization, or give the extra effort required to meet an important deadline.

Exerting influence requires a strategic approach to communication, one that begins with communicators who understand the outcomes their work is designed to produce. The

longer-term outcomes – commitment to the company’s plans and satisfaction with one’s job – lead to the kinds of returns the Watson Wyatt study identified. Committed and satisfied employees produce quality work and reflect the company’s values to other constituents, including customers. As a result, customers do more business with the company and refer others. That’s where return on assets, operating margin and revenue growth come from.

(Note that employees in companies that communicate well also tend to stay with the company, reducing turnover and the associated cost of replacing an employee, which runs on average about 2.5 times a single year’s salary.)

All these factors suggest that formal, strategic internal communication is no longer optional. Instead, it should be a core management function. Unfortunately, business isn’t doing a great job of integrating employee communication into its operational mindset. Another Watson Wyatt study, “WorkUSA,” concludes that employees are suffering a crisis of confidence in their organizations. Much of the problem is not the company’s fault, but rather fallout from other companies that have breached employee trust. The Enrons, Tycos, and Worldcoms of the business world have left employee faith in management shaken. Fewer than half of workers have faith in their management, a drop from the 50% rate recorded in 2000.

While magazines, intranets and town hall meetings can be useful tools, opening the appropriate channels and directing the give-and-take of news and information are the keys to rebuilding trust and driving employee commitment. As you raise the profile of your internal communication function, hold your communicators accountable for the results they achieve – insist on seeing the measurement that shows they are producing outcomes aligned with the organization’s goals and objectives.

Company leaders cannot leave internal communication to chance or relegate it to feel-good house organs. Those who do put hard-dollar ROI at risk.

Discussion: Discuss pertinence of this article to current organizational culture changes and identify culture processes that need additional effort.

While this article was not written with health care providers in mind, the message is pertinent to all organizations. The importance of improving organizational communication by involving all staff cannot be overemphasized. Let’s look at the four areas that make ‘employees tick,’ with a focus on home health.

TRUST: Staff can approach management and administration. There are avenues to express concerns, problems and/or conflicts.

ROLE KNOWLEDGE: All staff realizes the impact of their role in home health agency performance and have a clear understanding of their job expectations.

INVOLVEMENT: Staff participates in teamwork activities. Staff expresses an ‘ownership’ attitude concerning the organization.

A CONNECTION TO THE MARKETPLACE: All staff understands the role of home care in the health care continuum with a basic knowledge of home health criteria, quality programs, reimbursements, regulatory issues and any accreditations.

DO ANY CURRENT PROCESSES...

- Hinder staff from performing their role efficiently and effectively?
- Create frustration that results in disillusionment with the agency or other employees?
- Lead to confusion about employee's role within the organization?



Success Story:

Pat Nealon at VNA, An Affiliate of the Wyoming Valley Health Care System, made sure her staff was involved in examining agency strengths and weaknesses. She posted a paper tree and had staff write barriers and solutions to help with the agency focus on communication. The staff liked the opportunity to make suggestions. Pat reinforced that staff had to list solutions, not just barriers. Their concerns and suggestions were presented to management for discussion.

As a quality improvement project the agency initiated a “focus group” consisting of three direct care providers, the compliance/utilization manager, the OASIS performance improvement nurse and the performance improvement OBQI coordinator. Selection of the direct care providers was made by management who chose two “champions” and one who was having some difficulties keeping up with the requirements of her daily work assignments.

This group was also educated on the quality improvement process and the importance of 100% buy-in from staff. Casper reports, Home Health Compare and reportable outcomes as well as Case Mix were explained once it was discovered that staff had little knowledge and understanding of these reports.

The direct caregivers in this group were responsible for taking the information from these meetings back to their peers. Based on the input of the focus group, changes to field staff's daily routines were made. Staff verbalized that the changes were positive. Staff morale is improving because they feel their concerns are being reviewed, and the communication door has been opened between staff and management. The plan is to rotate all staff into focus groups, allowing for more staff input and commitment to the agency.



Checkpoint

Is there programmed time to discuss organizational performance at regularly scheduled management/team/staff meetings?

Do all levels of staff receive updates on organization's performance? (Quality outcomes, financial, etc.)

Does staff recognize their role in agency performance? (Quality, financial, regulatory)

Do all levels of staff have an opportunity to offer input on the organization's performance?

Are there policies and procedures to support an open communication process?



Documentation:

Identify practices and processes that the organization needs to implement to continue culture improvement.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

NOTE: Some agencies may recognize that they need more work at the initial level, identifying specific processes that need to be corrected before moving into a higher level of change. The team that identifies this **as necessary** should go back to Workbook I and identify which areas need additional work. Time spent identifying organizational culture problems and correcting the identifiable issues will help guide the agency into broader acceptance and approval of the changes. However, **teams must recognize that problems will always arise** and need correction no matter what stage of organizational change is occurring. It is important to recognize the difference of needing to work on fundamental processes versus ongoing improvement issues.

Discussion Notes (optional):

Module 6 – Promoting Competencies (continued)



Activity #3: Document Problems and/or Strengths and Plan Intervention Actions

Approximate time: 30 minutes

Activity Description: Read the questions below; Group discussions; Update plan based on recommendations of group.

Discussion: Discuss questions below and determine the consensus for organizational culture problems and strengths. Team will plan for continued changes to current practices and processes.

Documentation: Complete “Summary of Discussion” questions at the end of this excerpt; Document Intervention actions and Problems/Strengths on the Plan of Action.



Problems and Strengths

- In Workbook I, your team reviewed organizational culture materials and then determined problems and strengths in your agency. A plan of action for improvement was initiated.
- After reviewing the material from this module, does the team recognize an improved model and/or specific interventions that have enhanced organizational culture?
- Is the agency prepared to move organizational change to the next level – incorporating competencies at all levels and establishing processes to promote change?

Understanding Intervention Actions

- Intervention Actions are the actions that your team selects to move your agency forward in improving your organizational culture.
- Not all Intervention Actions are appropriate for all home health agencies. **These Intervention Actions are samples that may be modified.**
- **Your team may opt to use NONE of these Intervention Actions and develop your own actions.**
- Select only a few Intervention Actions at this time. **(It is suggested that your team selects three or fewer Intervention Actions at this time.)**
- Your team will be able to review these Intervention Actions again in the future and select additional actions.



Problems and/or Strengths

Has your team updated problems and strengths on the Plan of Action (Workbook Part I)?



Intervention Actions

- Check all that apply
- Document checked boxes on Plan of Action

- Communicate the findings from this meeting with your agency's executive management.

- Using the exercises in this module, identify one to three specific priority areas for process/procedure changes. (Identify practices and processes.)

- Educate management and staff on the concepts in this module using the documents in this module to help understand the need for organizational culture change to promote improvement.

- Other (explain):

- Other (explain):

- Other (explain):

Discussion Notes (optional):

Module 7: Developing Capability



Organizational Culture Stage: Modeled

“The most important single ingredient in the formula of success is knowing how to get along with people.”

– Theodore Roosevelt

Meeting Date:

Attendees:

Objectives for Module 7:

1. The Organizational Culture Team will discuss and develop processes to define skills for staff and teams to promote quality within the organization’s culture.
 2. The team will meet with the executive management team to reinforce the need for consistent recognition and reward of staff and teams.
-

Activities for Module 7

Estimated time for completion of Module 7 is 2.0-2.5 hours.

- Activity #1 – Meeting Review
(Approximate time: 20 minutes)
- Activity #2 – Defining Skills
(Approximate time: 60-75 minutes)
- Activity #3 – Document problems and/or strengths and plan Intervention Actions
(Approximate time: 45 minutes)

Module 7 – Developing Capability

Activity #1: Meeting Review

Approximate time: 20 minutes

Activity Description: Team Leader leads the group through the “Meeting Review Checklist” section below.

Discussion: Discuss ideas for competencies as per the checklist items below.

Documentation: Complete the “Meeting Review Checklist” below; Document changes on the Plan of Action.

The Organizational Culture Team will begin each meeting with a review of previous meeting discussions and activities. This will include highlights of discussion points from previous modules, work that has occurred since the last meeting, and a review of the Plan of Action as it currently stands.



Meeting Review Checklist

The following checklist will be used for the meeting review:

- The Team Leader reviews the purpose of this team.
- The Team Leader reviews highlights from the previous meeting.
- The Team Leader reviews the Plan of Action (Workbook Part I) as it currently stands.
- Team members give an update of any Intervention Actions that have occurred since the last meeting or are in progress:
 - What activity has occurred?
 - Have all activities occurred as planned?
 - Were there any issues or barriers to accomplishing Intervention Actions?

- Are any activities or Intervention Actions in progress?

- What were the successes or “light bulb moments” since the last meeting? (“Light bulb moments” are insights that came from discussions or activities that change the way the team member perceived something.)

- ❑ The Team Leader asks for suggestions or recommendations related to the current Plan of Action.

- ❑ The Team Leader briefly reviews the activities planned for today’s meeting. (This review can follow the activity listing from the previous page or can take the form of a formal meeting agenda.)

Module 7 – Developing Capability (continued)

Activity #2: Defining Skills

Approximate time: 60 minutes

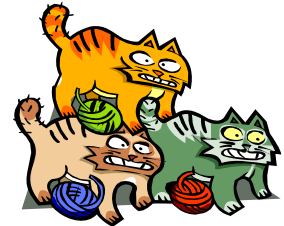
Activity Description: Team Leader reviews the following section with the team and guides the team in promoting the development and enhancement of identified skills.

Discussion: Use the following definition and excerpts.

Documentation: Document changes on the Plan of Action.

HERDING CATS:

The phrase **herding cats** comes from the common saying that something involving coordination of many different groups or people is *as difficult as herding cats*. (http://en.wikipedia.org/wiki/Cat_herder)



Comparing improving organizational culture to herding cats is a natural fit. Breakdowns in organization teamwork, communication, care coordination, etc. occur daily, sometimes hourly! Considering *all the potentials* for problems between individuals and teams can seem overwhelming to any organization. However, **paying attention** to individual and team behavior is essential for every business, especially health care providers! **Imagine** the potential fallout from broken and neglected processes: jeopardizing health and safety of patients, turnover in workforce, financial consequences – just to name a few.

LET’S REVIEW WHERE WE ARE: Modules 1-5 assisted the organizational culture team with recognizing organizational culture barriers, identifying areas for improvement, discussing reward and recognition for positive behavior and learning how to monitor improvement. Module 6 guides the team through a review of the plan of action and begins an investigation of organizational process changes that must occur to sustain improvement.

The path to improving organizational culture is examining fundamentals first, and then moving to bigger processes. This transition may be smoother than the initial work, because opening the organization up to culture improvement may be one of the biggest hurdles. However, moving through the change process is critical in order to have a home care agency that will survive and thrive.



Tip: Increase Accountability Among Staff

It is imperative that organizational culture be held to a high standard by both individuals and teams. Moreover, all members of the agency must be held accountable for their behaviors. Administrators or managers who do not agree to the organizational changes will cause a rapid demise of the improvement plan. Subsequently, the long term goals of organizational change: motivated staff, staff retention, improved patient outcomes, even better financial outcomes, will not be achieved.



Success Story:

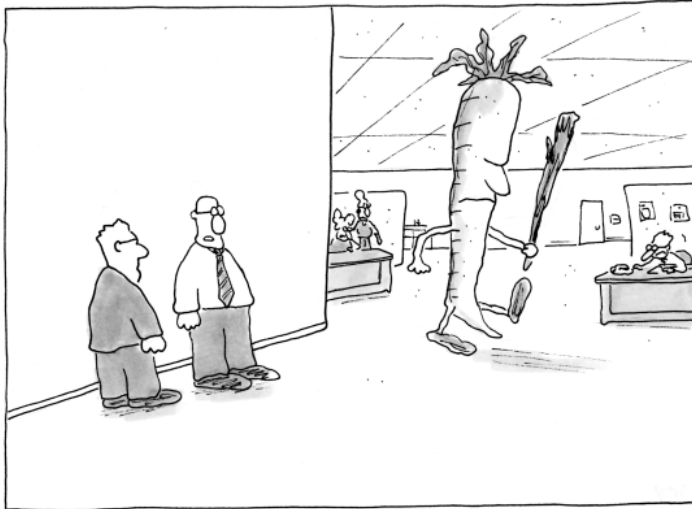
Lori Metzger at Berwick Home Health and Hospice began working with her team on organizational culture in the summer of 2006. One of the early identified issues was frustration resulting from communicating with physicians. The home health agency was also working on improving their acute care hospitalization rate. Lori introduced the SBAR (Situation-Background-Assessment-Results) tool and encouraged her nurses to act more as a patient advocate with the physicians. Lori is a nurse practitioner and used her advanced training to educate the staff. Suggested strategies were “This patient would prefer to stay home. Do you think we could try some interventions before we send him/her to the hospital?” The nurses were educated to identify and report early symptoms that could be managed at home, rather than waiting until the patient worsened and required emergent/urgent care. Lori could hear nurses communicating with physicians, expounding on the suggestions she had taught. This had the beneficial effect of improving their acute care hospitalization rate and increasing rapport between nurse and physician.

More information on the SBAR tool can be found at www.medqic.org, under Home Health, Care Transitions.

All Stick and No Carrot

DOCTOR FUN presents 1988

df1988-1527



"This is their new big carrot and stick method."

Copyright © 2003 David Farley, d-farley@biblio.org http://biblio.org/Dave/dfun.html

This cartoon illustrates the quandary of rewarding staff yet holding them accountable. The Organizational Culture Team needs to develop appropriate awards – carrots – for agency staff, while also making staff aware that consequences exist for negative behaviors as well as positive ones. It's important to find the balance between rewarding and disciplining staff. This section will help the team evaluate current agency practices to determine what steps are needed to improve.



Tip:

Rewarding positive behaviors and not tolerating destructive ones involves organizational change. In other words, the **carrot** must be...

- ❖ Consistent
- ❖ Communicated
- ❖ Coordinated

LET'S BEGIN WITH THE BASICS. In light of current and future forecasts of health care workers it is evident that home health agencies can only recruit and sustain quality staff if they have a positive work environment along with competitive compensation packages. (U.S. Dept. of Labor)



Checkpoint

- How long has it been since your agency has reviewed its salary and benefit package?

- Has the agency completed a comparison of salary and benefit packages?

- How does the agency salary and benefit package compare to other agencies?

- Has the agency asked staff to evaluate their satisfaction with the package?

- Does your package offer flexibility and choice for the employee?

- Does your agency have a way to reward and recognize staff? (See Module 3)

Discussion Notes (optional):

BUT THAT'S NOT ALL... salary and reward alone will not recruit and retrain quality staff. There are certain **HALLMARKS**, or aspects, of home health that home health personnel list as what they **like most** about their work. The following references are some of the positive things that are representative of home health. Does your staff express this also? Or does the agency need to focus on improving one of these areas?



Documentation

Positive Elements	Agency Staff Feedback	Enhancement/Development
Flexibility		
Independence		
One-on-one direct patient care		
Adequate time for patient teaching		

Studies support these to be the top areas for home health, including one study outlined in “Factors Attracting and Keeping Nurses in Home Care” published in *Home Healthcare Nurse* in 2005. It is interesting that pay and benefits were not significant factors in the **positive responses** of this particular study. However, pay was the fourth highest **negative response**. Obviously, pay and benefits cannot be ignored!



Tip: Encourage Independence

Independence and one-on-one direct patient care may seem like a given for home care. However, realizing that independence is truly valued by home health professionals should encourage leadership to make sure independence is cultivated and encouraged. Does staff have the necessary tools to promote independence with patient care? Or do agency processes hinder staff ability to operate independently? (*Example: Does staff need to come to office daily for supplies, paperwork, etc? Or does agency processes support care delivery from the patient's home?*)

One-on-one direct patient care is another area to examine. Occasionally agencies move clinicians to supervisory positions because of their superior job performance. Assess your positions carefully. Do you have managers who thrived when providing patient care? Perhaps incorporating patient care into some management or office positions would increase job satisfaction. However be very careful to not incorporate patient visits on top of other job demands!

A **comparative analysis** was completed with home health care nurses who are satisfied with their job and those who are not satisfied with their job. The analysis appeared in the article “What Home Healthcare Nurses Are Saying About Their Job,” published in *Home Healthcare Nurse* in 2006. Interestingly, both the satisfied and dissatisfied home health nurses report similar positive aspects of their jobs. However, nurses that were **least satisfied** described a **NEGATIVE** relationship with administration, and nurses who were **satisfied** described a **POSITIVE, SUPPORTIVE** relationship with leadership.

THE RELATIONSHIP BETWEEN STAFF AND LEADERSHIP IS CRITICAL.

Working cooperatively is **KEY** to retaining staff. Working with staff to improve processes is critical to organizational culture improvement.



Discussion Notes (optional):



Success Story:

Union Home Health, located in Ohio, encountered a problem many home health agencies face. Employees work often in the field, with little to no personal interaction among staff, especially across disciplines. To counter the effects of isolation, Deborah Albaugh, Director of Home Care, and Winnie Little, Supervisor, developed a Spirit Team.

In order to keep staff communicating with each other, the Spirit Team plans events to bring all employees together throughout the year. They took the theme from *A League of Their Own* and modified it to suit their purposes. So “there’s no crying in home care” was developed. Staff brought in baseball hats and caps and jerseys and took pictures of everyone in the department to create an agency “team.” They also implemented secret team members and on their birthday and holidays, members give cards. They also had a dessert day contest where prizes were given for the best dessert.

The actions that have resulted from the implementation of a culture survey are clear. “You can just tell in the interactions and what happens in the department; there seems to be less stress and conflict. It seems there’s more collaboration,” Albaugh explained.

Module 7 – Developing Capability (continued)



Activity #3: Document Problems and/or Strengths and Plan Intervention Actions

Approximate time: 45 minutes

Activity Description: Read the questions below; Group discussions; Update plan based on recommendations of group.

Discussion: Discuss questions below and determine the consensus for problems and strengths. Plan to evaluate employee satisfaction and evaluate current compensation package.

Documentation: Complete “Summary of Discussion” questions at the end of this excerpt; Document Intervention actions and Problems/Strengths on the Plan of Action.



Problems and Strengths

- After reviewing the material from this module, does the team recognize need to evaluate employee satisfaction? Are agency strengths promoted? Do leadership and staff work cooperatively?
- Is the agency prepared to move organizational change to the next level – incorporating changes at all levels and establishing processes to promote change?

Understanding Intervention Actions

- Intervention Actions are the actions that your team selects to move your agency forward in improving your organizational culture.
- Not all Intervention Actions are appropriate for all home health agencies. **These Intervention Actions are samples that may be modified.**
- **Your team may opt to use NONE of these Intervention Actions and develop your own actions.**
- Select only a few Intervention Actions at this time **(It is suggested that your team selects three or fewer Intervention Actions at this time.)**
- Your team will be able to review these Intervention Actions again in the future and select additional actions.



Problems and/or Strengths

Has your team updated problems and strengths on the Plan of Action (Workbook Part I)?



Intervention Actions

- Check all that apply
- Document checked boxes on Plan of Action

- Team evaluates culture change for all levels of staff.
- Team works with administration/human resources to evaluate job benefits.
- Team works to promote positive aspects of home health care.
- Other (explain):
- Other (explain):

Discussion Notes (optional):

Module 8: Mentoring Capability

Organizational Culture Stage: Managed



“If you would thoroughly know anything, teach it to others.”

– Tryon Edwards

Meeting Date:

Attendees:

Objectives for Module 8:

1. The Organizational Culture Team will discuss and develop competencies for staff and teams to promote quality within the organization.
 2. The team will meet with executive management team to explain competencies and reinforce need for consistent recognition and reward of staff and teams.
 3. The team will evaluate and suggest modifications to interviewing and orientation practices.
-

Activities for Module 8

Estimated time for completion of Module 8 is approximately 2.0-2.5 hours.

- Activity #1 – Meeting Review
(Approximate time: 20 minutes)
- Activity #2 – Defining Staff and Team Competencies
(Approximate time: 60-75 minutes)
- Activity #3 – Document Problems and/or Strengths and Plan Intervention Actions
(Approximate time: 45 minutes)

Module 8 – Mentoring Capability

Activity #1: Meeting Review

Approximate time: 20 minutes

Activity Description: Team Leader leads the group through the “Meeting Review Checklist” section below.

Discussion: Discuss ideas for competencies as per the checklist items below.

Documentation: Complete the “Meeting Review Checklist” below; Document changes on the Plan of Action.

The Organizational Culture Team will begin each meeting with a review of previous meeting discussions and activities. This will include highlights of discussion points from previous modules, work that has occurred since the last meeting, and a review of the Plan of Action as it currently stands.



Meeting Review Checklist

The following checklist will be used for the meeting review:

- The Team Leader reviews the purpose of this team.
- The Team Leader reviews highlights from the previous meeting.
- The Team Leader reviews the Plan of Action (Workbook Part I) as it currently stands.
- Team members give an update of any Intervention Actions that have occurred since the last meeting or are in progress:
 - What activity has occurred?
 - Have all activities occurred as planned?
 - Were there any issues or barriers to accomplishing Intervention Actions?
 - Are any activities or Intervention Actions in progress?

- What were the successes or “light bulb moments” since the last meeting? (“Light bulb moments” are insights that came from discussions or activities that change the way the team member perceived something.)

- The Team Leader asks for suggestions or recommendations related to the current Plan of Action.

- The Team Leader briefly reviews the activities planned for today’s meeting. (This review can follow the activity listing from the previous page or can take the form of a formal meeting agenda.)

Module 8 – Mentoring Capability (continued)

Activity #2: Defining Staff and Team Competencies

Approximate time: 60-75 minutes

Activity Description: Team Leader reviews the following section with the team and guides the team in defining competencies.

Discussion: Use the following definition and excerpts.

Documentation: Document changes on the Plan of Action.

TO BEGIN THIS DISCUSSION....

WHAT ARE COMPETENCIES?

“Typically, competencies are general descriptions of the abilities needed to perform a role in the organization. Competencies are described in terms such that they can be measured. It’s useful to compare competencies to job descriptions. Job descriptions typically list the tasks or functions and responsibilities for a role, whereas competencies list the abilities needed to conduct those tasks or functions. Consequently, competencies are often used as a basis for training by converting competencies to learning objectives” (McNamara 1997).

Understanding competencies will help your team define practices and processes to continue organizational culture improvement.

INITIAL AND ONGOING COMPETENCIES

Initial Competencies are the skills needed to get started in a new position. These include knowledge, skills and abilities required for orientation prior to independently carrying out the job functions (Wright 2005).

Ongoing Competencies are also called **Core Competencies**. These build upon already established knowledge, skills and abilities. These competencies reflect the changing nature of the job entwined with the organizational mission and goal (Wright 2005).



Tip: Develop Competency Assessments

- Competency assessments are a **continuous and an ongoing process** that should assess staff abilities along with organizational goals and objectives.
- Ongoing competency assessment evaluates skill requirements to achieve organization’s mission and goals.
- The individuals in the organization must achieve the competency requirements.
- Agency leadership **must define** the competencies and **provide continuing education opportunities** for the staff to accomplish the competencies.

Suggest team read the following excerpt located at:
www.managementhelp.org/staffing/specify/cmptncys/basics.htm.

Basic Approach to Identifying Job Competencies

Written by Carter McNamara, MBA, PhD, Authenticity Consulting, LLC. Copyright 1997-2006.

Competencies are the abilities needed to conduct a role in an organization. Identifying competencies for a role is a very useful exercise to really get one thinking about what's needed to carry out the role. Competencies descriptions are usually worded in measurable terms, therefore they're useful for reference when identifying training.

Below are some basic suggestions for developing a list of competencies needed for a role.

1. When developing the list, try to think in terms of areas of knowledge and skills. Review some examples of lists of competencies to get an idea of how competencies are worded.
2. Conduct a job analysis to understand the various tasks in the job and in what sequence. The analysis can include some or all of the following suggestions, as well.
3. Observe the employee or employees as they perform the task or conduct the role. What areas of knowledge do you see the employees using? What skills do you see the employees performing?
4. Consider administering a questionnaire to the employee or employees. On the questionnaire, ask them to describe certain practices and procedures to carry out the task or perform the role in the best way possible, e.g., for a managerial role, ask about the best way to conduct performance appraisals, conduct hiring procedures, etc. Explain that the questionnaire is to help the trainer help the employees to perform a task or conduct a role better.
5. Consider interviewing a highly skilled employee or a group of employees. Ask them to describe the necessary areas of knowledge and skills for superior performance.
6. Ideally, get advice from customers about what knowledge and skills are useful in delivering the best quality products or services to them.
7. Review the job description for all of the general responsibilities and duties of the role. Note that job descriptions may not describe the position in terms of needed areas of knowledge or skills.
8. A generic list of competencies may already exist for a role. For example, professional associations sometimes provide generic lists.



Documentation

Reviewing the suggestions from the excerpt, what would be some ways the team could determine competencies (i.e. observe employees; seek information from employees on organizational culture skills need to perform job duties).

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Checkpoint:



- Review current job descriptions.
- Does each job description outline expectations?
- Are organizational culture domain (teamwork, communication, care coordination, leadership, etc.) competencies clearly described?
- Does every job description include competencies? Do they include initial and ongoing competencies?
- Develop a list of competencies that should be included with staff job descriptions. ***
- Does the staff orientation and education plan include in-services on organizational culture domain? Staff should understand that competency is part of the job description.

*** SAMPLES OF COMPETENCIES

This list is not all inclusive, but will help the team to identify appropriate competencies to expand list. Competencies should have measurable achievements if at all possible.

Teamwork:

- ❑ Participates in agency teams
- ❑ Collaborates with team members to develop strategies and resolve issues
- ❑ Active participant in the improvement of the workplace and contributes by recognizing problems and presenting solutions
- ❑ Understanding roles of team leader and team follower and respect team members values so team can achieve outcome

Communication:

- ❑ Uses appropriate communication method majority of time (written, face-to-face, voice mail, phone contacts, etc.)
- ❑ Verbally participates within team to reach consensus
- ❑ Documents all aspects of patient care (per agency documentation policies)

Care Coordination:

- ❑ Comfortable making independent decisions with patient care
- ❑ Discusses patient care goals within team/other disciplines to establish goals
- ❑ Contacts physician and other care providers to develop patient goals, and to proactively plan for discharge, transition to other care setting
- ❑ Identifies patient needs and makes appropriate referrals to other community resources

Leadership:

- ❑ Demonstrates ability to prioritize assignments and tasks
- ❑ Encourages and empowers employees to make independent decisions with patient care
- ❑ Holds self accountable for achieving established performance expectations and services

List additional competencies to add to job descriptions:

-
- ❑ _____
 - ❑ _____
 - ❑ _____
 - ❑ _____

RECRUITMENT AND ORIENTATION

Another piece of building competencies is an evaluation of the recruitment and orientation processes. How are potential employees screened for how they'll fit within the organization? Does interview process include assessment of skills (both self-assessment and interviewer assessment)?



RECRUITMENT

Ideally future employees would be interviewed for an assessment of their skills. **Behavioral Interviewing** is one way to look at abilities. This type of interviewing looks at past performance to predict behavior in future situations. The interviewer asks probing questions to evaluate the candidate. STAR is an acronym used by both the interviewer and applicant for behavioral interviewing.

S: Situation

T: Tasks Involved

A: Action Taken

R: Result

A sample behavioral interview question on communication:

Tell me about a situation when you had to speak up (be assertive) in order to intervene for a patient.

...On interpersonal skills:

Tell me about a time you had to deal with a very upset patient/caregiver or a co-worker.

Good resources for behavioral interviewing include:

www.units.muohio.edu/careers/cds/interviewing.pdf

www.brockport.edu/career/behave.htm

www.spb.state.ms.us/SPB Documents/SPB/Behavior/BehavioralManual.pdf

Discussion Notes (optional):

ORIENTATION:

Orientation must include a review of agency organizational culture standards and expectations. This can be built into whatever type of orientation guidelines or checklists the agency has.



Tip: Orient New Employees to All Staff

Ideally employees would meet with all levels of staff and disciplines as part of orientation. Not only does this provide new employees with a better understanding of every role – from administrator to front-line staff, but also allows the new employee an opportunity to interact with staff. This promotes better compliance and buy-in to organizational practices!

Additional Discussion Notes (optional):



Success Story

Participation in CHAMP, a national collaborative focused on improving management of oral medications, affected much more than quality improvement for the Visiting Nurse Association of Boston (VNAB).

VNAB found success in the CHAMP program that they had not achieved in previous programs by approaching training from a new perspective. VNAB discovered that providing education through rote instruction with a follow-up test was not enough to affect staff change. True staff training, including distance learning, educational toolkits, teambuilding, team meetings, and more were needed to implement change and improve quality.

Once VNAB implemented this new, multidimensional approach to learning, they saw their publicly reported outcome measure on medication management improve by 9% over the course of a year.

Module 8 – Mentoring Capability (continued)



Activity #3: Document Problems and/or Strengths and Plan Intervention Actions

Approximate time: 45 minutes

Activity Description: Read the questions below; Group discussions; Update plan based on recommendations of group.

Discussion: Discuss questions below and determine the consensus for organizational culture problems and strengths. Team plans development of competencies to support organizational mission and goals.

Documentation: Complete “Summary of Discussion” questions at the end of this excerpt; Document Intervention actions and Problems/Strengths on the Plan of Action.



Problems and Strengths

- After reviewing the material from this module, does the team identify competencies that need to be added to job descriptions?
- Is the team agreeable to examining current hiring and orientation practices to help integrate new employees with agency culture?

Understanding Intervention Actions

- Intervention Actions are the actions that your team selects to move your agency forward in improving your organizational culture.
- Not all intervention actions are appropriate for all home health agencies. **These Intervention Actions are samples that may be modified.**
- **Your team may opt to use NONE of these Intervention Actions and develop your own actions.**
- Select only a few Intervention Actions at this time **(It is suggested that your team selects three or fewer Intervention Actions at this time.)**
- Your team will be able to review these Intervention Actions again in the future and select additional actions.



Problems and/or Strengths

Has your team updated problems and strengths on the Plan of Action (Workbook Part I)?



Intervention Actions

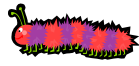
- Check all that apply
- Document checked boxes on Plan of Action

Team will plan meeting with HR/management to discuss:

- Determine and establish competencies for all staff.
- Develop staff education plan for competencies.
- Evaluation of current interviewing practices.
- Plan for orientation process to incorporate education on competencies and include opportunities for networking with staff.
- Expansion of orientation to include time with all disciplines.
- Other (explain):

Discussion Notes (optional):

Module 9: Quantitative Performance Management



Organizational Culture Stage: Modeled



“Life must be understood backwards; but... it must be lived forward.”

– Soren Kierkegaard

Meeting Date:

Attendees:

Objectives for Module 9:

1. The Organizational Culture Team will discuss and enhance the process for staff training and development methods needed to create an effective evaluation of organizational culture.
-

Activities for Module 9

Estimated time for completion of Module 9 is 2 hours.

- Activity #1 – Meeting Review
(Approximate time: 30 minutes)
- Activity #2 – Planning Training and Measuring Results
(Approximate time: 60-75 minutes)
- Activity #3 – Document Problems and/or Strengths and Plan Intervention Actions
(Approximate time: 30 minutes)

Module 9 – Quantitative Performance Management

Activity #1: Meeting Review

Approximate time: 20 minutes

Activity Description: Team Leader leads the group through the “Meeting Review Checklist” section below.

Discussion: Discuss ideas for competencies as per the checklist items below.

Documentation: Complete the “Meeting Review Checklist” below; Document changes on the Plan of Action.

The Organizational Culture Team will begin each meeting with a review of previous meeting discussions and activities. This will include highlights of discussion points from previous modules, work that has occurred since the last meeting, and a review of the Plan of Action as it currently stands.



Meeting Review Checklist

The following checklist will be used for the meeting review:

- The Team Leader reviews the purpose of this team.
- The Team Leader reviews highlights from the previous meeting.
- The Team Leader reviews the Plan of Action (Workbook Part I) as it currently stands.
- Team members give an update of any Intervention Actions that have occurred since the last meeting or are in progress:
 - What activity has occurred?
 - Have all activities occurred as planned?
 - Were there any issues or barriers to accomplishing Intervention Actions?

- Are any activities or Intervention Actions in progress?

 - What were the successes or “light bulb moments” since the last meeting? (“Light bulb moments” are insights that came from discussions or activities that change the way the team member perceived something.)
-
- ❑ The Team Leader asks for suggestions or recommendations related to the current Plan of Action.

 - ❑ The Team Leader briefly reviews the activities planned for today’s meeting. (This review can follow the activity listing from the previous page or can take the form of a formal meeting agenda.)

Module 9 – Quantitative Performance Management (continued)

Activity #2: Planning Training and Measuring Results

Approximate time: 60-75 minutes

Activity Description: Team Leader reviews the following section with the team and facilitates discussion. Team develops plan for training and measuring results.

Discussion: Use the following definition and excerpts.

Documentation: Document changes on the Plan of Action.

EVALUATIONS...

It makes sense that a successful agency will pay attention to the needs and training of its workforce. Performance evaluations are completed at least annually on all employees. However, the organizational culture team is looking at **the big picture**. How does a workplace evaluate training needs? How much do you invest in employee training and education? What is the return value to the organization? Usually the largest expense in an organization is its workforce, and clearly an organization will cease to exist without a functioning workforce! However, at this stage in organizational culture, the agency is moving beyond **‘functioning’** to **‘thriving.’** It would seem logical that training and investment in staff is vital for organizations to flourish and succeed. The following model will help the agency plan and measure investment in training.

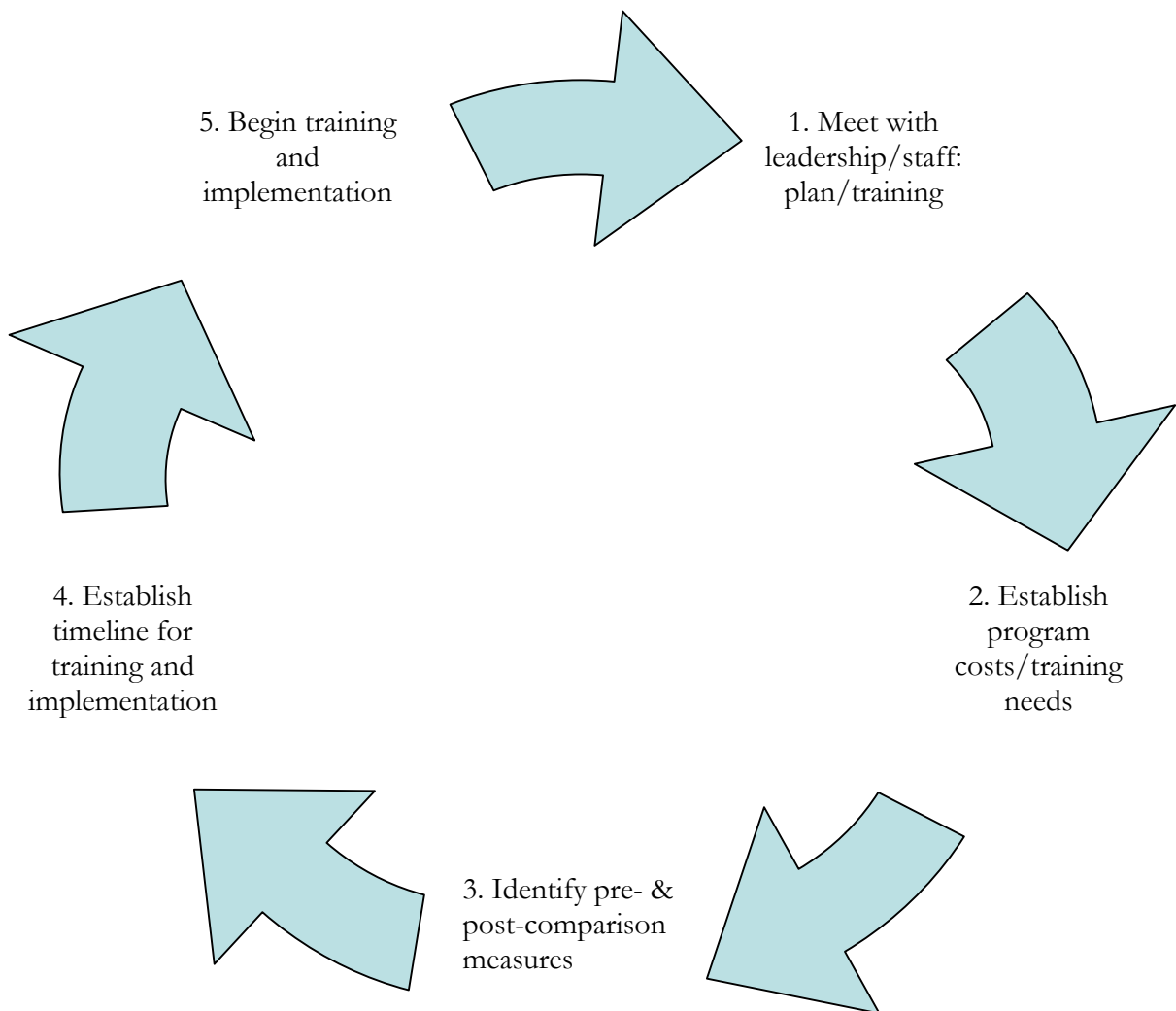
The following is from “A Guide to Strategically Planning Training and Measuring Results,” U.S. Office of Personnel Management, Office of Workforce Relations (July 2000).



Steps				
1. Analyze Established Goals	Begin with a review of competences (Module 8)	Do competencies incorporate future agency plans?		
2. Develop Training Strategies	Are there specific training needs to help meet team and individual competencies?	How does the potential training benefits compare to the costs?		
		Costs (salaries/benefits of personnel, direct training costs, administrative costs, compensation, lost productivity)	Potential Benefits (increased output, time/resource savings, improved quality, and error reduction)	
3. Integrate Training Into Strategic Plans	Does the training relate to the agency's strategic plans/goals?	How do you measure the training success?	What tasks and resources are required to implement the training?	
		Establish Performance Goal and Performance Indicator		
4. Evaluate Training Goal Accomplishments	Was the training goal achieved?	Did the training goal help achieve the agency's related strategic goal?	What is the comparison of benefit to cost?	Are modifications required?
	How to assess: <ul style="list-style-type: none"> • Interview • Survey • Performance Sampling • Review Existing Monitoring and Reporting Data 			

APPLICATION OF THE STRATEGICALLY PLANNING TRAINING AND MEASURING RESULTS MODEL

An agency has worked on organizational culture, focusing on improving communication. One of the agency's strategic plan goals is to "Decrease Work Duplication and Increase Staff Efficiency," based on feedback within the agency. This goal is a priority, based on management and staff input. The agency organizational culture team has discovered that to ultimately improve communication within the agency, the current computer software needs to be updated. Additional time and resources for selecting the program as well as staff training are required. The agency needs to identify how to best select the program and plan for training needs. Additionally, the agency needs to evaluate the effectiveness of the training. The following graph illustrates an example of the Strategically Planning Training and Measuring Results process.



This is only an example, but certainly a process most home health agencies are familiar with as updating computer programs and training staff in new software programs is an essential and necessary part of business.



Tip: Involve All Staff

Pay attention to incorporating all staff in planning and evaluating the project. This would include selecting the product, analyzing costs, determining training needs and developing timelines.



Checkpoint

- Review agency strategic plan.
- Does training or education outline reflect specific ways to meet strategic plan goals?
- Does training move beyond standard evaluation to appraisal of return?
- Does evaluation of training needs include leadership and staff input?



Success Story

In 1999, several Ohio agencies faced a dramatic change. Five independent home health agencies – two large and three small – within the Cleveland Clinic hospital system were to be brought together as one. “You can imagine the culture shock of that,” shared Darlene Zakrajsek, Executive Administrator for Home Care Services. Between 1999 and 2001, the five different agencies came together.

Coordinating care across such a large area and large number of providers was not an easy process. To gain coordination among agency staff – from front-line field staff to managers – the agency developed four cornerstones that all employees would work toward. The four guiding principles are teamwork, quality, service, and innovation. “In the middle of those four cornerstones are the patients,” Darlene explains. “Within each of those cornerstones we look at goals in each of our operational areas that will help us achieve our targets. At first, the front-line staff didn’t really understand those metrics. We needed to have buy-in from the front-line employees to make ourselves successful.”

The agency also focuses on teaching leaders how to talk to employees: be engaged, be interested, solicit feedback, and listen. Their efforts are paying off. The agency’s 25 percent turnover rate reduced to 8 to 9 percent last year.

Discussion Notes (optional):

Module 9 – Quantitative Performance Management (continued)



Activity #3: Document Problems and/or Strengths and Plan Intervention Actions

Approximate time: 45 minutes

Activity Description: Read the questions below; Group discussions; Update plan based on recommendations of group.

Discussion: Discuss questions below and determine the consensus for problems and strengths. Evaluate strategic plan and discuss benefits of quantitative performance management to enhance strategic plan evaluation. Propose method for quantitative performance management.

Documentation: Complete “Summary of Discussion” questions at the end of this excerpt; Document Intervention actions and Problems/Strengths on the Plan of Action.



Problems and Strengths

- After reviewing the material from this module, does the team understand how to incorporate Quantitative Performance Management to support the agency strategic plan?
- Is the agency prepared to move organizational change to ‘macro’ processes?

Understanding Intervention Actions

- Intervention Actions are the actions that your team selects to move your agency forward in improving your organizational culture.
- Not all intervention actions are appropriate for all home health agencies. **These Intervention Actions are samples that may be modified.**
- **Your team may opt to use NONE of these Intervention Actions and develop your own actions.**
- Select only a few Intervention Actions at this time **(It is suggested that your team selects three or fewer Intervention Actions at this time.)**
- Your team will be able to review these Intervention Actions again in the future and select additional actions.



Problems and/or Strengths

Has your team updated problems and strengths on the Plan of Action (Workbook Part I)?



Intervention Actions

- Check all that apply
- Document checked boxes on Plan of Action

Team will plan meeting with HR/management to discuss:

- Incorporating quantitative performance measures in strategic planning.
- Staff and leadership participate in identifying training needs for agency.
- Training needs are aligned with strategic plan.
- Quantitative performance measures are incorporated to evaluate leadership and staff training.
- Other (explain):
- Other (explain):

Module 10: Continuous Improvement



Organizational Culture Stage: Optimized

“The greatest thing in this world is not so much where we are, but in which direction we are moving.”

- Oliver Wendell Holmes Jr.

Meeting Date:

Attendees:

Objectives for Module 10:

1. The Organizational Culture Team will evaluate if agency has established a culture of feedback and accountability.
 2. The home health agency promotes the development of evolving competencies that replicate ongoing improvement changes.
-

Activities for Module 10

Estimated time for completion of Module 10 is 1.5 hours.

- Activity #1 – Meeting Review
(Approximate time: 20 minutes)
- Activity #2 – Focus on Organizational Culture
(Approximate time: 60 minutes)

Module 10 – Continuous Improvement

Activity #1: Meeting Review

Approximate time: 20 minutes

Activity Description: Team Leader leads the group through the “Meeting Review Checklist” section below.

Discussion: Discuss ideas for competencies as per the checklist items below.

Documentation: Complete the “Meeting Review Checklist” below; Document changes on the Plan of Action.

The Organizational Culture Team will begin each meeting with a review of previous meeting discussions and activities. This will include highlights of discussion points from previous modules, work that has occurred since the last meeting, and a review of the Plan of Action as it currently stands.



Meeting Review Checklist

The following checklist will be used for the meeting review:

- The Team Leader reviews the purpose of this team
- The Team Leader reviews highlights from the previous meeting.
- The Team Leader reviews the Plan of Action (Workbook Part I) as it currently stands.
- Team members give an update of any Intervention Actions that have occurred since the last meeting or are in progress:
 - What activity has occurred?
 - Have all activities occurred as planned?
 - Were there any issues or barriers to accomplishing Intervention Actions?

- Are any activities or Intervention Actions in progress?

- What were the successes or “light bulb moments” since the last meeting? (“Light bulb moments” are insights that came from discussions or activities that change the way the team member perceived something.)

- ❑ The Team Leader asks for suggestions or recommendations related to the current Plan of Action.

- ❑ The Team Leader briefly reviews the activities planned for today’s meeting (This review can follow the activity listing from the previous page or can take the form of a formal meeting agenda.)

Module 10 – Continuous Improvement (continued)

Activity #2: Focus on Organizational Culture

Approximate time: 60 minutes

Activity Description: Team Leader reviews the following section with the team and facilitates discussion and evaluation.

Discussion: Use the following definition and excerpts.

Documentation: Document changes on the Plan of Action.

THE ORGANIZATIONAL CULTURE TEAM HAS ARRIVED...

Module 10! Arrived?... Actually true culture teams will realize that this is an **ongoing** process. That's why it is called **CONTINUOUS IMPROVEMENT** – an essential method for managing an organization.

Just for fun... let's do a brief review... the quality capability model is built on developmental stages, and progression through the stages helps an organization arrive at **continuous improvement**. Culture started with working on **'micro'** processes and progressed to addressing change at a **'macro'** level. Remember that **'macro'** is the 'big picture.' Can your team recall some 'micro' processes...perhaps small changes that lead to improved processes, and better connected staff? Micro changes leading to macro change. Specifically, the agency functions as a **smooth, interrelated machine**. Accepting changes that are innovative is the **normal mode** of functioning. This may sound a little frightening, and the team may express that this isn't **'normal'** for your agency! However, remember that change is constant, and the way your organization handles change is **the mark of success**.



Tip: Involve Leadership

It is crucial that all leadership be involved and supportive in the continuous improvement. Administration and managers must see quality improvement as **critical** to agency operations. The Studer Group, www.studergroup.com, addresses the importance of holding all accountable in the blog, "Conversations with Quint Studer" with *What You Permit, You Promote*.



CONSIDER USING THIS RESOURCE:

Scott J. Simmerman in “*Teaching the Caterpillar to Fly*” has ideas about change that can be used with the organizational culture team and shared with leadership. (www.squarewheels.com/content/teaching.html)

Mr. Simmerman states, “Quality is a people thing. A cross-functional team with a few skills, a mission and vision, and a bit of empowerment from management can generate the objectivity, perspective, collective knowledge and support to make real improvements in systems and processes, the root solution to the quality issue. And by getting people involved in the solution, they become equity owners of the process and we do things with them rather than to them.”

THE EFFECT MAY HAVE OTHER ADVANTAGES...



Success Story:

All Care Home Care in Hazleton, Pa. supports working on organizational culture. Working on culture change has helped this agency achieve better patient outcomes, along with helping them work towards continuous improvement.

They have the benefit of an improved acute care hospitalization rate along with improvement with the other publicly reported outcomes. Mary Ruth Price and Mary Ellen Sansoni state that, initially organizational culture may sound like ‘another language,’ but actually culture change is just the way things need to be done. Mary Ruth explains that change is vital to survival for a home care agency. How does working on culture change affect patient outcomes? Culture change is process changes... many that evolve into better ways of providing patient care.

All Care Home Care chose to work on communication after taking the initial organizational culture survey and discussing the results with their staff. Managers and staff brainstormed to identify ways to improve communication. Linking staff in planning the changes and strategies was critical to lead the agency through the organizational culture stages. Asking staff to participate in the ‘micro’ changes, allowed for an easier transition to ‘macro changes.’ Accepting change and identifying strategies “is just the way we do things at All Care.” Other successful strategies were identifying agency weaknesses, considering every staff recommendation - no idea is ‘too little,’ and involve everyone in the change, including the advisory board. Mary Ruth and Mary Ellen like to say that “if you continue to do things the same way... you will keep getting the same results.”



So... where do we go from here?

CONTINUOUS IMPROVEMENT is never finished... that's why it is *continuous*.

Consider the other organizational culture domains. Some of these may have had a side benefit of improving while your organization worked on another domain. Does additional time need to be spent on any of the following?

1. Teamwork
2. Communication
3. Care Coordination
4. Leadership
5. Patient Centered Care
6. Information Flow
7. Organizational Learning
8. Quality Improvement Model



And a final **CHECKPOINT**

Never lose the personal focus. Make sure the organizational mission addresses:

Consumer (patient/caregiver):

- Are the needs of the patient driving your mission?
- Does patient care delivery depend on staffing, agency resources or patient needs?
- Do patient survey results create appropriate changes within the organization?

Employees:

- Is the recruitment and preservation of quality staff reflected as high priority?
- Does leadership really communicate how the organization is doing? (Are staff meetings focused only on financial viability? Or is it personal, e.g. patient thank you letters read, etc.)
- Are employees encouraged to offer input into agency processes and changes?

Community:

- Is your organization visible?

- [] How does the agency communicate its mission to the community?
- [] What would other community services say about your business?

Congratulations!!!



Your Team has Successfully Completed Organizational Culture Part II !!!

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