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## TOOL 1: SENIOR LEADER SCOUTING REPORT

Name __________________ Department ____________________________

Dept/Person Rounded on __________________________ Date/Week of ________________

<table>
<thead>
<tr>
<th>Key Words or Questions</th>
<th>Special Employee Issues</th>
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**Tips:**
- Initially introduce purpose and commitment to rounding.
- Executive Assistant can help manage Senior Leader Rounding process and schedule by sending log to department leader in advance to complete the left side.
- Information – to be completed by department leader in advance of Senior Leader Rounding.

<table>
<thead>
<tr>
<th>Comments</th>
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<tbody>
<tr>
<td>1. Accomplishments of the Department</td>
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<tr>
<td>2. New Equipment Purchased</td>
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<tr>
<td>3. Staff to Recognize</td>
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<tr>
<td>4. Staff to Coach/Mentor</td>
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<tr>
<td>5. Tough Questions/Issues</td>
</tr>
<tr>
<td>6. Physician Activities or Issues</td>
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<tr>
<td>7. Current Patient Satisfaction Results</td>
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<tr>
<td>8. Current Employee Satisfaction Results</td>
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### TOOL 2: STOPLIGHT REPORT

Take a look at some of our results from rounding. More information is available on your department communication board.

<table>
<thead>
<tr>
<th>COMPLAINTS (GREEN)</th>
<th>IN PROGRESS (YELLOW)</th>
<th>CAN’T COMPLETE AT THIS TIME AND HERE’S WHY: (RED)</th>
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</table>
TOOL 3: ROUNDER MANAGER™ - LEADER ROUNCING LOG

*Customized and created in Studer Group Rounding Manager™ software.
**TOOL 4: ROUNDEL MANAGER™ – ROUNDEL ON AREAS SERVED LOG**

*Customized and created in Studer Group Rounding Manager™ software.*

![Image of a user interface for rounding manager tool]

- **Select a Focus Area**
  - Working Well
  - Needs Improvement
  - Other

- **Select a Department for Trending**
  - Trend Department

- **Email Department Leader**
  - Send Email

- **Follow Up**
- **Add Another Comment**

- **Roundee – Admin, Admin**

- **What Are We Doing Well?**
- **Staff to Recognize?**
- **What Is the Best Service We Provide? Why?**
- **When You Have a Problem Do You Know Who to Call?**
- **What Could We Do Better to Support You?**
TOOL 5: ROUNDING MANAGER™ – LEADER ROUNDING ON PATIENT LOG

*Customized and created in Studer Group Rounding Manager™ software.
TOOL 6: ROUNCING MANAGER™ – HOURLY ROUNCING PATIENT LOG

*Customized and created in Studer Group Rounding Manager™ software.
TOOL 7: ROUNding Manager™ - IndIVIDUALized PAtIENT care ROUNding FORM

IP PATIENT ROUNDING FORM

SAVE ALL

Individualized Patient Care Rounding Log

Select a Focus Area
Comment
- Working Well
- Needs Improvement
- Other

Make Entry Secure: [ ] Secure Entry
Select a Department for Tending: Trend Department
Email Department Leader: [Send Email]

FOLLOW UP Add Another Comment

Select a Focus Area
Comment
- Working Well
- Needs Improvement
- Other

Make Entry Secure: [ ] Secure Entry
Select a Department for Tending: Trend Department
Email Department Leader: [Send Email]

FOLLOW UP Add Another Comment

Select a Focus Area
Comment
- Working Well
- Needs Improvement
- Other

Make Entry Secure: [ ] Secure Entry
Select a Department for Tending: Trend Department
Email Department Leader: [Send Email]

FOLLOW UP Add Another Comment

Select a Focus Area
Comment
- Working Well
- Needs Improvement
- Other

Make Entry Secure: [ ] Secure Entry
Select a Department for Tending: Trend Department
Email Department Leader: [Send Email]

FOLLOW UP Add Another Comment

Select a Focus Area
Comment
- Working Well
- Needs Improvement
- Other

Make Entry Secure: [ ] Secure Entry
Select a Department for Tending: Trend Department
Email Department Leader: [Send Email]

FOLLOW UP Add Another Comment
TOOL 8: BEDSIDE SHIFT REPORT ROUNding LOG - STAFF

Date: ______________________

To: ______________________  From: ___________________________

I have rounded on and watched some of your patients today and asked them about how their care has been and if bedside report is occurring as we planned. Here is your personal feedback, based upon your patients’ perception and my observations.

Room #'s: __________________________________________________________________________

<table>
<thead>
<tr>
<th>Activity/Behavioral Items</th>
<th>% Excellence Achieved</th>
<th>% with opportunities for improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduced oncoming nurse to patient</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managed up the oncoming nurse</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Included patient in the report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Used key words appropriately</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Checked the equipment and supplies in the room – IV’s, monitors, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If visitors were in the room, explained that you are doing the Bedside Report and asked the patient if he/she wanted the visitors to step out</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior to leaving the room, the off-going nurse thanks the patient for allowing you to provide them care.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incorporated SBAR in report</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Overall Comments:

________________________________________________________________________

Staff signature _____________________________________________________________________________
**TOOL 9: AIDET INTERACTION ASSESSMENT**

| Employee Name: |  |
| Department: |  |
| AIDET Auditor Name: |  |
| Date of Observation: |  |

- **Y** N Knocked before entering patient room
- **Y** N Called patient by his/her name
- **Y** N Introduced him/herself by name
- **Y** N Mentioned years of experience, certification or training
- **Y** N Checked and confirmed patient ID-(lab, x-ray, respiratory)
- **Y** N Used key words “safety”, “comfortable”, “personal needs”
- **Y** N Explained any pain or discomfort expected
- **Y** N Gave a time expectation of how long a test or procedure would take
  Or how long they would be in the room interacting with the patient
- **Y** N Managed up others (staff, physicians, depts, hospital)
- **Y** N Asked patient if there was anything they could do before leaving
- **Y** N Assessed room for any irritants and offered assistance (temp, noise)
- **Y** N Thanked patient for cooperation
- **Y** N Displayed good eye contact and listening skills

**Check Performance Rating:**
- ❑ Excels at AIDET
- ❑ Competent at AIDET
- ❑ Repeat AIDET rounds
TOOL 10: 30 DAY NEW EMPLOYEE MEETING REPORT

Name: _____________________________   Date of Hire: _______________________

Department: ________________________   Title: ______________________________

1. How do we compare with what we said?

2. What is going / working well?

3. Have there been any individuals who have been helpful to you?

4. Based on your prior work, what ideas for improvement do you have?

5. Is there any reason that you feel this is not the right place for you?

Leader Signature   Date

[Signature]

[Date]
**TOOL 11: 90 DAY NEW EMPLOYEE MEETING REPORT**

Name: _____________________________   Date of Hire: _______________________

Department: ________________________   Title: ______________________________

1. How do we compare with what we said?

2. What is going / working well?

3. Have there been any individuals who have been helpful to you?

4. Based on your prior work, what ideas for improvement do you have?

5. Is there any reason that you feel this is not the right place for you?

6. Do you know of anyone who would be a good fit for our organization?

7. As your supervisor, how can I help you?

<table>
<thead>
<tr>
<th>Leader Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TOOL 12: ROUNDING MANAGER™ – THANK YOU NOTE TRACKING LOG

Manage Thank You Notes

Add Employee

Who wrote the thank you note?

Who received the thank you note?

Reason for the Thank You Note:

When was thank you note sent?

Save
TOOL 13: Sample Behavioral Based Interview Questions (www.studergroup.com)

Analysis

- What steps do you follow to study a problem before making a decision? Can you tell me about a time when you have used these steps?
- We can sometimes identify a small problem and fix it before it becomes a major problem. Give an example(s) of how you have done this.

Adaptability

- Give me an example of a time when the rules or structure of a project was changed last minute. How did you adapt to this environment?
- Give me an example of a time when you had two important projects competing for your time. How did you prioritize your work?

Initiative

- Describe a project or idea (not necessarily your own) that was implemented, or carried out successfully primarily because of your efforts.
- Tell me about a time when you found ways to make a job easier or more rewarding.

Patient Service

- Tell me about the most difficult patient service experience that you have ever had to handle—perhaps an angry or upset patient. Be specific and tell what you did and what the outcome was.
- Give me an example of a time when you had to think on your feet to ensure that the patient got the best service possible.

Leadership

- Give me an example of a time you have placed yourself in a leadership position. How might you have improved your role?
- Give an example of your ability to build motivation in your co-workers, classmates or a volunteer committee.

Planning and Organizing

- Give an example of what you did when your time schedule or project plan changed because of unforeseen circumstances.
- How do you schedule your time, set priorities? How do you handle multiple priorities at once? Can you give me a specific example of a time when you did this?

Teamwork

- What did you do in your last job/internship to contribute toward a teamwork environment?
- Tell me about a time when a willingness to share your knowledge significantly enhanced an outcome or decision.
TOOL 14: STUDER GROUP GLOSSARY OF TERMS

Communication Board:
A message board organized and aligned by Pillars and placed strategically in an organization or department to communicate consistent messages and key information to the staff and physicians. Most organizations use the Five Pillars: Service, People, Quality, Financial, and Growth to organize and communicate the information. Studer Group uses six Pillars with the addition of Community.

Connecting the Dots:
To use key words to link actions to the goals and values of the organization and help others understand what you are doing and why. This can be done throughout all activities, i.e. awards, announcements, thank yous, staff meetings, new policies, etc.

Key Words at Key Times:
Key words at key times are things said and done to "connect the dots" and help patients, families, and visitors better understand what we are doing. They align our words with our actions to give a consistent experience and message.

Hardwire:
The process by which an organization, department, team or individual integrates a behavior or action into the daily operations to ensure it becomes a habit and is always done.

Harvest Wins:
The action of taking positive information learned and sharing it with others. This action will not only help people feel they have purpose, do worthwhile work and make a difference, but also allow others to learn from others success -- Behavior that is rewarded and recognized will be repeated.

Healthcare Flywheel:
A teaching tool/diagram that illustrates the power that Purpose, Passion, To-Do’s and Results has in creating momentum in an organization. Studer Group developed the Healthcare Flywheel to help organizations understand the journey in creating great places for employees to work, physicians to practice, and patients to receive care.

Leadership Development Institute:
These are regularly scheduled, two-day leadership training sessions held off-site on a quarterly basis to develop new, current and future leaders in an organization. LDI curriculum aligns to the goals of the organization and focus on the skills and knowledge leaders need to be successful and help meet those goals.

Manage Up:
Positioning others in a positive light. It is a form of communication at all levels that aligns your own skills, your co-workers, other departments and physicians to the goals of your organization. Example: Letting your supervisor know to attend a celebration regarding achievement of results or to pass on positive information regarding an area so that they can be recognized. This makes you and your organization better and aligns everyone to working on the right goals.
Must Haves®
Specific actions and “to-do’s” common to organizations achieving exceptional results. These Must Haves™ are based on the Nine Principles™ and evolved from the Studer Group partnering with hundreds of organizations to identify these actions. The Must Haves™ are (1) Rounding For Outcomes, (2) Employee Thank You Notes, (3) Selection And The First 90 Days, (4) Discharge Phone Calls, (5) Key Words At Key Times and (6) Aligning Leader Evaluations With Desired Behaviors.

Nine Principles®:

Rounding for Outcomes:
Communicating with employees, physicians and patients in such a way that there is a specific purpose to walk away with specific outcomes.

Pillars:
A foundation and framework used to set organizational goals and the evaluation process. Once the goals for each pillar are set for the organization as a whole, they are cascaded throughout, from the division level to department or unit level, to individual leader. Most organizations use the Five Pillars: Service, People, Quality, Financial, and Growth. These can be customized to fit specific language or organizational terms, or other pillars can be added, such as Community. Studer Group has Six Pillars – and includes Community. These pillars then lay the framework for consistent evaluations, communications, and work planning.

Pushback:
Resistance received from employees, physicians and leadership.
### TOOL 15: ECONOMIC LINKAGE GRID

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<th>PILLAR</th>
<th>ROI / ECONOMIC LINKAGE</th>
<th>CONTACT</th>
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<tbody>
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<td>Executive Man-hours Spent on Litigation</td>
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<td>Quality</td>
<td>Length of Stay</td>
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<td>OR start times</td>
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<td>Revenue from less “left without treatment”</td>
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## TOOL 16: COMPLETED ECONOMIC LINKAGE GRID (SAMPLE)

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<th>PERIOD 2</th>
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<td>Legal Fees</td>
<td>K. Empey</td>
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<td>Executive Man-hours Spent on Litigation</td>
<td>K. Empey</td>
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<td></td>
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</tr>
<tr>
<td><strong>Quality</strong></td>
<td>Length of Stay</td>
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<td></td>
<td>Re-Admits</td>
<td>G. Cox</td>
<td>11.37%</td>
<td>10.24%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Returns to Surgery w/in 48 hours</td>
<td>J. Warren</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Returns to ED w/in 24 hours</td>
<td>L. Ratcliff</td>
<td>411</td>
<td>420</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No-show Rate</td>
<td>D. Harris</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nosocomial Infections</td>
<td>A. Gawlik</td>
<td>39%</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pressure Ulcers</td>
<td>L. Barabash</td>
<td>76</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Medication Errors</td>
<td>D. Sioma</td>
<td>1185</td>
<td>1020</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aspirin w/in 2 hours of AMI</td>
<td>J. Stewart</td>
<td>92.3%</td>
<td>90.5%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Antibiotics w/in 4 hours of Pnemonia</td>
<td>J. Stewart</td>
<td>64.3%</td>
<td>60.0%</td>
<td></td>
</tr>
<tr>
<td><strong>People</strong></td>
<td>Employee Turnover</td>
<td>J. Sinclair</td>
<td>11.50%</td>
<td>9.60%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>RN Turnover</td>
<td>J. Sinclair</td>
<td>12.00%</td>
<td>8.10%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>First year Turnover</td>
<td>J. Sinclair</td>
<td>33.00%</td>
<td>25.00%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency Expense</td>
<td>J. Sinclair</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PRN Expense</td>
<td>J. Sinclair</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Overtime Expense</td>
<td>J. Sinclair</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recruitment Expense</td>
<td>J. Sinclair</td>
<td>$176,631</td>
<td>$76,624</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Processing Fees</td>
<td>J. Sinclair</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sign-on Incentives</td>
<td>J. Sinclair</td>
<td>$18,500</td>
<td>$15,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Orientation</td>
<td>J. Sinclair</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td><strong>Finance</strong></td>
<td>Collections (total posted as a % of gross revenue includes cash and contractual [avg] )</td>
<td>C. Bradley</td>
<td>92.40%</td>
<td>90%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff productivity</td>
<td>U. Griswold</td>
<td>3.96</td>
<td>3.98</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OR start times</td>
<td>J. Warren</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Revenue from less “left without treatment”</td>
<td>L. Ratcliff</td>
<td>$166,090</td>
<td>$160,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>AR Days (Avg)</td>
<td>C. Bradley</td>
<td>60.7</td>
<td>60.5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Advertising Costs</td>
<td>R. Kirkpatrick</td>
<td>$62,590</td>
<td>$64,000</td>
<td></td>
</tr>
<tr>
<td><strong>Growth</strong></td>
<td>Inpatient Admissions</td>
<td>D. Fiero</td>
<td>4,265</td>
<td>4,375</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Inpatient Revenue</td>
<td>D. Fiero</td>
<td>$25,988,340</td>
<td>$32,120,134</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Outpatient Visits</td>
<td>D. Fiero</td>
<td>82,307</td>
<td>82,100</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Outpatient Revenue</td>
<td>D. Fiero</td>
<td>$34,394,480</td>
<td>$38,398,555</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Surgery Cases</td>
<td>D. Fiero</td>
<td>4,382</td>
<td>4,480</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Surgery Revenue</td>
<td>D. Fiero</td>
<td>$19,705,725</td>
<td>$21,602,050</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consults</td>
<td>D. Fiero</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Market Share</td>
<td>G. Cox</td>
<td>49%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professional Net Revenue</td>
<td>D. Fiero</td>
<td>$4,427,793</td>
<td>$5,869,873</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Inpatient Revenue per Top 20 Admitters</td>
<td>D. Fiero</td>
<td>$22,366,736</td>
<td>$25,000,020</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Physician Turnover (# resignations/# medical staff)</td>
<td>C. Bethea</td>
<td>1.4%</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>
### TOOL 17: SAMPLE LEADERSHIP TRAINING TWO DAY AGENDA

**Achieving Exceptional Care**

#### Day One:

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 to 8:00</td>
<td>Registration and Continental Breakfast</td>
<td>Logistics Team</td>
</tr>
<tr>
<td>8:00 to 8:15</td>
<td>Kickoff Comments</td>
<td>LDI Team Leader</td>
</tr>
<tr>
<td>8:15 – 8:45</td>
<td>Welcome and Introductions</td>
<td>CEO</td>
</tr>
<tr>
<td>8:45 – 9:45</td>
<td>Rounding for Outcomes</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>9:45-10:00</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:00-11:20</td>
<td>Rounding for Outcomes (cont)</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>11:20 – 11:30</td>
<td>Connect to Purpose Story</td>
<td>Curriculum Team</td>
</tr>
<tr>
<td>11:30 – 12:30</td>
<td>Lunch</td>
<td>Logistics Team</td>
</tr>
<tr>
<td>12:30 – 1:30</td>
<td>Rounding Role-plays</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>1:30– 2:00</td>
<td>Thank You Notes</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>2:00 – 2:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>2:30 – 3:00</td>
<td>Pillar By Agenda</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>3:00 – 3:30</td>
<td>Research Meeting Update</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>3:30 – 3:45</td>
<td>Day One Closing Remarks and Linkage Grid</td>
<td>CEO</td>
</tr>
<tr>
<td>3:45 – 4:00</td>
<td>Evaluations Day 1 and Adjourn</td>
<td>LDI Team Leader</td>
</tr>
<tr>
<td>4:00-5:00</td>
<td>LDI Team Debrief</td>
<td>LDI Team</td>
</tr>
</tbody>
</table>

#### Day Two:

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00-8:00</td>
<td>Breakfast and Registration</td>
<td>Logistics Team</td>
</tr>
<tr>
<td>8:00-8:45</td>
<td>Welcome and Introduction</td>
<td>LDI Team Leader</td>
</tr>
<tr>
<td>8:45-9:45</td>
<td>Achieving Exceptional Care – How we will achieve!</td>
<td>CEO</td>
</tr>
<tr>
<td>9:45-10:15</td>
<td>Break</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>10:15-11:30</td>
<td>Goal Alignment</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>11:30-12:30</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>12:30-1:30</td>
<td>Goal vs. Tactic – Exercise</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>1:30-1:45</td>
<td>Timeline for Goal Development and LEM</td>
<td>&lt;Assigned content speaker&gt;</td>
</tr>
<tr>
<td>1:45-2:15</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>2:15-2:30</td>
<td>Connect to Purpose Story</td>
<td>LDI Curriculum Team</td>
</tr>
<tr>
<td>2:30-3:30</td>
<td>Activity: Why Transformation Efforts</td>
<td>LDI Curriculum Team</td>
</tr>
<tr>
<td>3:30-3:50</td>
<td>Closing Remarks</td>
<td>CEO</td>
</tr>
<tr>
<td>3:50-4:15</td>
<td>Linkage and Questions Day 2 Evaluations</td>
<td>LDI Team Leader</td>
</tr>
<tr>
<td>4:15</td>
<td>Adjourn</td>
<td></td>
</tr>
<tr>
<td>4:15-5:15</td>
<td>LDI Team Debrief</td>
<td>LDI Team</td>
</tr>
</tbody>
</table>
**TOOL 18: LEADERSHIP ASSESSMENT** (Page 1)

**STUDER GROUP Leadership Needs Assessment**

This survey is designed to help assess leadership needs in our organization. Please provide two responses for each leadership topic. First, circle a number under "Level of Benefit" to tell us how much this skill would benefit you personally. Then circle A, B, or C to share your opinion on how training in this area would positively impact Pillar goals.

<table>
<thead>
<tr>
<th>COMMUNICATION</th>
<th>Level of Benefit</th>
<th>Impact on Pillar Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Communicating for impact and influence</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>2. Effective writing skills</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>3. Listening skills</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>4. Presentation skills</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>5. Developing feedback-rich environments</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>6. Giving positive and negative feedback</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>7. Handling difficult conversations</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WORKING WITH OTHERS</th>
<th>Level of Benefit</th>
<th>Impact on Pillar Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Building relationships</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>9. Conflict management</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>10. Valuing diversity</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>11. Effective delegation</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>12. Creating win/win/wins</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>13. Building collaborative relationships</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>14. Working through barriers/solving problems</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>15. Identifying high, middle, and low performing employees</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>16. Conducting high, middle, and low performer conversations</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>17. Building high-powered teams</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>18. Coaching and mentoring</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
<tr>
<td>19. Energizing people</td>
<td>None  2  3  4  5</td>
<td>C  B  A</td>
</tr>
</tbody>
</table>
### TOOL 18: LEADERSHIP ASSESSMENT (Page 2)

#### BUSINESS SKILLS

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
<th>Level of Benefit</th>
<th>Impact on Pillar Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Budget process/fiscal responsibility</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>21</td>
<td>Creating and developing goals</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>22</td>
<td>Measuring progress and performance</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>23</td>
<td>Planning and organizing</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>24</td>
<td>Recruiting and hiring</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>25</td>
<td>Interviewing skills</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>26</td>
<td>Retaining staff</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>27</td>
<td>Project management</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>28</td>
<td>Evaluating people and performance</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
</tbody>
</table>

#### LEADERSHIP

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
<th>Level of Benefit</th>
<th>Impact on Pillar Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>Leading versus managing</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>30</td>
<td>Fostering innovation</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>31</td>
<td>Creating an environment of continuous improvement</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>32</td>
<td>Coaching for optimal performance</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>33</td>
<td>Engaging and motivating others</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>34</td>
<td>Leading change</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>35</td>
<td>Rewarding and recognizing positive results</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>36</td>
<td>Accountability-taking ownership of challenges</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>37</td>
<td>Dealing with ambiguity</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>38</td>
<td>Learning best practices</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>39</td>
<td>Aligning behaviors with goals</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>40</td>
<td>Developing a leadership pipeline</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
</tbody>
</table>

#### ORGANIZATIONAL SKILLS

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
<th>Level of Benefit</th>
<th>Impact on Pillar Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>41</td>
<td>Corporate/community citizenship</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
<tr>
<td>42</td>
<td>Customer focus</td>
<td>None 1, Little 2, Some 3, Much 4, Great 5</td>
<td>Low C, Medium B, High A</td>
</tr>
</tbody>
</table>
### TOOL 19: SAMPLE LINKAGE GRID

#### Linkage Grid

<table>
<thead>
<tr>
<th>Key Learning</th>
<th>Activity</th>
<th>Person Responsible</th>
<th>Due Date</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Studer Group website</strong></td>
<td>Register on the Studer Group website: <a href="http://www.studergroup.com">www.studergroup.com</a> Access the Partner Website; Saving Lives Healthcare Center password is: SLHC-111</td>
<td>All leaders</td>
<td>05/15/2007</td>
<td></td>
</tr>
</tbody>
</table>
| **Cascade Information** | Hold department meeting with staff to communicate LDI information. Talking points available on SG Partner Website. Key discussion points:  
  - Why we are on this journey for excellence  
  - Six Pillars goals and how we will measure  
  - How we will accomplish our goals | All leaders        | 05/25/2007    |           |
| **Rounding for Outcomes** | Implement Rounding on Staff  
  - Develop and review with your supervisor a rounding plan that allows you to connect with 100% of your direct reports monthly.  
  - Document outcomes from rounding on staff to include who, staff/physician recognition, follow-up items, and tough questions.  
  - Review rounding logs with your supervisor monthly | All leaders        | Plan by 05/25/2007 Then ongoing |           |
| **Pillar by Agenda** | Use Agenda by Pillar format for all department and staff meetings – template available on SG/SLH Partner website | All leaders        | Immediate and ongoing |           |
TOOL 20: PHASES OF ORGANIZATIONAL IMPROVEMENT

Phases of Organizational Improvement

- Phase 1: The Honeymoon
  - What to expect:
    - Sense of excitement
    - Right "to do" list
    - Things will get better (hopes)
    - Quick fixes are implemented
    - Skeptics
  - Key Action Steps:
    - Provide more communication (information)
    - Acquire tools and improve systems
    - Roll out Behavior Standards
    - Implement new accountability system (or tighten up the one you have)
    - Begin Leadership Development Sessions
    - Begin Task Forces and Teams

- Phase 2: Reality Sets In
  - What to expect:
    - We/they
    - Inconsistency
    - Bigger than I thought
    - This will impact me
    - Some are getting it
    - Some are not
  - Key Action Steps:
    - Leadership training gets more substance and targeted to goals of the organization
    - Re-recruit high performers
    - Increase substance of communication to stakeholders
    - Prepare to have conversations with high/medium/low performers
    - Increase specific reward and recognition

- Phase 3: The Uncomfortable Gap
  - What to expect:
    - The performance gap is evident
    - Tougher decisions must be made
    - Process improvement increases
    - Inconsistencies become obvious
  - Key Action Steps:
    - Tough questions are responded to and hardened by leaders
    - HML Completed
    - The "right people" are in the "right places"

- Phase 4: Consistency
  - What to expect:
    - High performing results
    - Everyone understands the keys to success
    - Disciplined people and disciplined processes
    - Proactive leadership
  - Key Action Steps:
    - Push for innovation
    - Standardize and repeat key behaviors
    - Next generation of tools/techniques

- Phase 5: Leading the Way
  - Purpose, worthwhile work and making a difference
  - kepac
  - Self-Motivation
  - Leverage Results (Transparency and Accountability)
STANDARDS TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for ensuring that employees fully understand and support the organization’s “Standards of Behavior”.

MEMBERSHIP:
- Cross-section of employee population
- Creative people
- Like to work with people
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:
- Update and review your initiative with the committee
- Review team purpose and goals
- Review and share organization’s purpose
- Set agreed-upon meeting time and attendance policy
- Establish team meeting ground rules
- Review and Benchmark other organization’s “Standards of Behavior”

QUICK HITS:
- Create an employee event around the CEO and Leadership Team signing the “Standards of Behavior” pledge

FIRST-MONTH TARGETS:
- Begin to meet weekly
- Begin creating your “Standards of Behavior”
  - Determine how you want to individualize and create the “Standards of Behavior” for your organization
  - Brainstorm needed behavior standards for your organization
  - Review patient satisfaction data to possibly identify needed “Standards of Behavior”
- Create a statement for all employees to sign, indicating their understanding and support of the “Standards of Behavior”
- Create a draft copy of the your “Standards of Behavior”
SECOND MONTH TARGETS:

- Continue to meet weekly
- Allow employees to review and provide input to the draft “Standards of Behavior”. Make appropriate changes.

SECOND MONTH TARGETS (continued):

- Obtain approval from leadership team for the new “Standards of Behavior.”
- Develop a policy to require all new hires to sign the “Standards of Behavior” prior to completing a job application.
- Plan the roll-out the “Standards of Behavior”:
  - Plan a week of activities to educate employees about the Standards and get them to sign off on them.
  - Create an event around your CEO and leadership team signing of the pledge to the “Standards of Behavior.”

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Make final revisions to the “Standards of Behavior”.
- Participate in the rollout of the standards at the Employee Forums and activities.
- Set up a twelve-month calendar to focus on a different Standard each month.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Begin the rollout of the designated “Standard of the Month”.
- Reinforce learning of the “Standard of the Month” to employees with creative and fun learning activities.
- Each department manager introduces and reinforces the “Standards of Behavior” to their employees and answers questions.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to support the rollout of the designated “Standard of the Month” to employees with creative and fun learning activities.
FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to support the roll-out of a designated “Standard of the Month” to employees with creative and fun learning activities.
- At the end of first year, select a new team leader and begin to rotate new members onto the committee.

FIRST-YEAR ACCOMPLISHMENTS:

- All employees have been educated as to expectations so that they will understand and follow the “Standards of Behavior”.
- All employees have signed the “Standards of Behavior”.
- All job applicants have signed “Standards of Behavior” before being interviewed.
- All employees understand that they will be held accountable for the behaviors outlined.
MEASUREMENT TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for correctly measuring, interpreting and communicating progress of the organization’s initiative.

MEMBERSHIP:

- People whom like data analysis and numbers.
- People whom like teaching others how to use and interpret numbers and data.
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:

- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Begin looking and familiarizing the team with the patient satisfaction survey, read the questions and talk about how to make each question a high scoring question.

QUICK HITS:

- Develop a presentation that explains the data in a simple way and provide an overview to each department.
- Reward and recognize someone who has done very well in the data.
- Roll-out weekly patient satisfaction scores.

FIRST-MONTH TARGETS:

- Begin to meet weekly.
- Continue learning toward becoming experts in the understanding and interpretation of the data. Study and understand questions on the questionnaire.
- Begin looking for trends in the data.
- Review verbatim comments from the actual surveys and look for insight and trends.
- Meet with the Patient Satisfaction Team to discuss the data and trends
- Meet with the Reward and Recognition team to let them know of the areas / departments to be recognized for high scores and improvements.

SECOND MONTH TARGETS:

- Continue to meet weekly.
- Continue to evaluate the weekly satisfaction scores.
SECOND MONTH TARGETS (continued):

- Continue to meet with the Reward and Recognition team to let them know of the areas / departments to be recognized for high scores and improvements.

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Continue to evaluate the weekly satisfaction scores.
- As soon as trends are obvious, team leader should initiate visits with managers of areas with low scores and invite the manager or department team to a team meeting.
- Continue to meet with the Reward and Recognition team to let them know of the areas / departments to be recognized for high scores and improvements.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Begin same process with the ED questionnaire.
- Continue to meet with the Reward and Recognition team to let them know of the areas / departments to be recognized for high scores and improvements.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to evaluate the weekly satisfaction scores.
- Look for trends.
- Continue to meet with the Reward and Recognition team to let them know of the areas / departments to be recognized for high scores and improvements.

FOURTH-QUARTER TARGETS:

- Develop a team that can visit departments with problems, observe and make recommendations for change.
- Continue to meet with the Reward and Recognition team to let them know of the areas / departments to be recognized for high scores and improvements.
FIRST-YEAR ACCOMPLISHMENTS:

- The organization has been saturated with measurement information and understands the importance of measuring often, communicating measurements to everyone, and how measurement works with reward and recognition to improve often.
- Committee members have become experts on the data from the patient satisfaction survey and how to improve scores.
- At the end of the first year, move to monthly meetings if applicable.
INPATIENT TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for bringing the same level of care to all inpatients.

MEMBERSHIP:

- Anyone who works in an inpatient area.
- Cross-section of employee population.
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:

- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Brainstorm ways to “wow” the patients.

QUICK HITS:

- Implement two things that cost little or no money that will immediately be seen as customer friendly service to the patients and family. (e.g., valet parking, vending machines, etc)
- Educate staff to begin using, “Is there anything I can do for you, I have time” key words.

FIRST-MONTH TARGETS:

- Begin to meet weekly.
- Solicit input on ways to improve care.
- Each team member calls six patients and asks how service can be improved.
- Develop key words for each team member to use when calling patients.
- Results are compiled and discussed with the committee.
- Review and familiarize the team with the patient satisfaction survey questions.
- Meet jointly with the Measurement Team to review patient satisfaction scores and comments and discuss next steps and points of mutual concern.
- Order patient communication boards for each patient room.
SECOND MONTH TARGETS:

- Continue to meet weekly.
- Install patient communication boards in each patient room and educate staff regarding their purpose and use.
- Implement nurse leader rounding:
  - Each nurse leader should round on all new patients everyday, using specific questions and phrases.
  - Develop rounding key words, such as, “Hello, My name is ____________. I am the nurse leader on this floor. On behalf of my entire staff, I want to make sure that you are receiving excellent care. Do you know the name of your caregiver? Do you have all the information you need? Is there anything more I can do for you, I have time.”
- Educate staff on the purpose and the key words and monitor success.
- Search and remove all other patient satisfaction surveys that “compete” with the system-wide questionnaire.

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Implement discharge phone calls using the key words, “Hello, I am ____________. I am calling to see how you are doing. Do you have any questions regarding your discharge or home care instructions?”
- Monitor effective usage of the patient communication boards.
- Continue nurse leader rounding.
- Ensure continued usage of the patient communication boards.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Continue to monitor and use discharge phone calls.
- Continue nurse leader rounding.
- Ensure continued usage of the patient communication boards.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Develop and implement appropriate key words as needed to ensure consistent and positive messages are delivered to the patients and families. (e.g., Housekeeping: “Did I miss anything?”)
- Begin to identify and problem solve with managers / teams in areas with problems.
THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to monitor and use discharge phone calls.
- Continue nurse leader rounding.
- Ensure continued usage of the patient communication boards.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Continue to develop and implement appropriate key words.

FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to monitor and use discharge phone calls.
- Continue nurse leader rounding.
- Ensure continued usage of the patient communication boards.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Continue to develop and implement appropriate key words.
- At the end of the first year, select a new team leader and begin to rotate new members onto the committee.

FIRST-YEAR ACCOMPLISHMENTS:

- Rounding is part of the daily routine of every leader.
- Key words and messages are being used to send consistent and positive messages to patients and families.
- Discharge phone calls are implemented and working well.
- Patient communication boards are being used effectively to communicate and monitor the satisfaction of the patient and family.
- Institutionalized review of inpatient questionnaires and follow-up with patients and family members.
- Inpatient satisfaction team members are the “in-house” experts and serve as consultants to inpatient areas on how to improve satisfaction.
OUTPATIENT TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for bringing the same level of care to all outpatients.

MEMBERSHIP:

- Anyone who works in an outpatient area.
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:

- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Brainstorm ways to “wow” the outpatients.

QUICK HITS:

- Implement two things that cost little or no money that will immediately be seen as customer friendly service to the outpatients and family. (e.g., valet parking, vending machines, etc)
- Educate staff to begin using, “Is there anything I can do for you, I have time” key words.

FIRST-MONTH TARGETS:

- Begin to meet weekly.
- Solicit input on ways to improve care.
- Each team member calls six outpatients and asks how service can be improved.
- Develop key words for each team member to use when calling outpatients and family.
- Results are compiled and discussed with the committee.
- Review and familiarize the team with the outpatient satisfaction survey questions.
- Meet jointly with the Measurement team to review outpatient satisfaction scores and comments and discuss next steps and points of mutual concern.

SECOND MONTH TARGETS:

- Continue to meet weekly.
- Search and remove all other outpatient satisfaction surveys that “compete” with the system-wide questionnaire.
- Implement and educate employees regarding the Five Fundamentals of Service and ensure that all staff uses this in interactions with the outpatient and the family.
- Acknowledgement: Acknowledge the patients on arrival
SECOND MONTH TARGETS (continued):

- Introduction: Introduce yourself
- Time Expectations: Set time expectations with the outpatient and family members.
- Explanation: Explain the procedure and how the patients will obtain their report.
- Thank you: Thank the patient and family for choosing your hospital for their healthcare needs.

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Monitor the usage of the five fundamentals of service in the outpatient areas.
- Conduct an audit of the outpatient waiting areas and discuss ways to make them friendlier.
- Solicit employees to bring in their magazines and place them in outpatient waiting areas as appropriate.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Monitor the usage of the five fundamentals of service in the outpatient areas.
- Develop and implement appropriate key words as needed to ensure consistent and positive messages are delivered to the outpatients and family members.
- Begin to identify and problem solve with managers / teams in areas with problems.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Monitor the usage of the five fundamentals of service in the outpatient areas.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Continue to develop and implement appropriate key words.

FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Monitor the usage of the five fundamentals of service in the outpatient areas.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Continue to develop and implement appropriate key words.
- At the end of the first year, select a new team leader and begin to rotate new members onto the committee.
FIRST-YEAR ACCOMPLISHMENTS:

- Waiting rooms are customer friendly for the outpatients and their family.
- Key words and messages are being used to send consistent and positive messages to outpatients and families.
- Institutionalized review of outpatient questionnaires and follow-up with patients and family members.
- Outpatient satisfaction team members are the “in-house” experts and serve as consultants to outpatient areas on how to improve satisfaction.
REWARD AND RECOGNITION TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for focusing the organization on Reward and Recognition.

MEMBERSHIP:
- People whom like celebrating successes and developing and implementing reward and recognition programs.
- People whom are creative.
- Cross-section of employee population.
- Suggested Membership total = Ten (10)

FIRST- MEETING OBJECTIVES:
- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Review organizational rewards already in place.
- Look at ways in which employees in your hospital want to be rewarded.

QUICK HITS:
- Begin sending thank you cards and implement a process to make sure they are done consistently and regularly.
- Begin looking for little “wins” which can be celebrated and reward appropriately. (e.g., no overtime on a unit, employees mentioned on a patient satisfaction letter)

FIRST- MONTH TARGETS:
- Begin to meet weekly.
- Develop and implement a hospital-wide recognition program (e.g., Legends, Champions, Heroes, Employee of the Month, etc.)
- Review the patient satisfaction data and comments distributed by the Measurement Team and reward and recognize those who are achieving results. (e.g., Rotate a banner advertising the highest score for the week/month as appropriate)
- Establish a process to hold managers accountable for ensuring employees are recognized on a consistent and regular basis in their departments.
- Create a system to track employees who are recognized.
SECOND MONTH TARGETS:

- Continue to meet weekly.
- Continue to support and keep alive the reward and recognition system/process that has been established.
- Involve the hospital administrator in sending a handwritten appreciation note to the home of employees on a weekly basis.
- Establish a system to reward and recognize physicians.
- Reward and Recognize staff at the Employee Forum.

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Continue to support and keep alive the reward and recognition system/process that has been established.
- Continue to look for additional ways to reward and recognize activities and behaviors in the organization.
- Ensure reward and recognition is happening at the department/unit level. (e.g., department bulletin boards, department meetings, etc.)
- Establish reward and recognition as part of the leader and department/unit meeting agendas.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Continue to support and keep alive the reward and recognition system/process that has been established.
- Continue to look for additional ways to reward and recognize activities and behaviors in the organization.
- Begin sharing these successes house-wide in employee newsletter or through memos and flyers.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to support and keep alive the reward and recognition system/process that has been established.
- Continue to look for additional ways to reward and recognize activities and behaviors in the organization.
FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to support and keep alive the reward and recognition system/process that has been established.
- At the end of the first year, select a new team leader, move to meeting twice a month, and begin rotating new members onto the committee.

FIRST-YEAR ACCOMPLISHMENTS:

- A hospital-wide recognition program is well established. (e.g., Legends, Champions, Heroes, Employee of the Month, etc.)
- Reward and Recognition is a part of the daily routine and culture of the organization.
- The hospital administrator is sending handwritten thank you notes to the homes of the employees.
- Employees and departments are being rewarded and recognized based on their positive results related to the patient satisfaction data.
SERVICE RECOVERY TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for providing service recovery to those patients whose expectations have not been met and for communicating the desire to exceed everyone’s expectations.

MEMBERSHIP:
- Cross section of employees
- People who like work with customers whose needs have not been met.
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:
- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Overview basic principles of Service Recovery:
  - Goal: To recover from anything less than excellent service
    - Why service recovery system/process is needed for the entity.
    - Service Recovery is an opportunity to turn unmet customer expectations into a marketing effort.
  - As a team, brainstorm and record excellent Service Recovery examples experienced from other businesses.

QUICK HITS:
- Implement a Service Recovery tracking system.
- Develop Service Recovery key words.

FIRST-MONTH TARGETS:
- Begin to meet weekly.
- Develop service recovery key words to role model how to say, “I’m sorry” and elicit the problem from the patient/family.
- Sample key words: “I am so sorry, clearly we did not meet your expectations. What can I do right now to make the situation better.”
- Roll-out and educate all employees about the key words.
- Begin to work on your service recovery tracking system if one is not already in place.
SECOND MONTH TARGETS:

- Continue to meet weekly.
- Provide a means to report service recovery incidents. (e.g., Install a “Service Recovery hotline” for all employees to use)
- Establish “Service Recovery Tool Boxes” for the departments that include items that may be used to help recover the patient/family. (e.g., coupons for the cafeteria / gift shop, tokens, small gifts, etc.)
- Distribute the tool boxes to each department and provide education regarding their use and purpose. Establish a process to maintain the boxes.
- Develop and implement a service recovery response protocol that any employee can access and use.
  - Example 1: Establish an account in the gift shop that any employee can access quickly, with little paperwork. This account allows the employee say “I’m sorry” with a small (under $10) gift or token.
  - Example 2: Establish an account, accessed by any employee at a certain location that can make cash compensation to a patient for up to $150 for a loss of personal property (e.g., teeth, slippers, robes, etc.)

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Begin to track Service Recovery incidents and identify trends.
- When trends are identified, work to resolve the issue so that it will not reoccur. (e.g., Meet with the manager of the area to correct the problem or refer the problem to another team or to administration to be resolved.)
- Continue to ensure that the service recovery key words are being used consistently and effectively across the organization.
- Maintain and evaluate the service recovery “Tool boxes”.
- Create a Service Recovery policy.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Continue to ensure that the service recovery key words are being used consistently and effectively across the organization.
- Continue to track service recovery incidents, identify trends and fix processes.
- Maintain and evaluate the service recovery “Tool boxes”.
- Establish a “Comfort Closet” in your entity to allow employees to easily access items to make the experience of the patient and family more comfortable. (These items may or may not be used for Service Recovery, but add to the service initiative. Items in the closet may include toothbrushes, toothpaste, wet towelettes, combs, shampoo, stuffed animals, etc.)
- Report successes in the employee newsletter or communication boards.
THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly
- Continue to ensure that service recovery key words are being used consistently and effectively across the organization.
- Continue to track service recovery incidents, identify trends and fix processes.
- Maintain and evaluate the service recovery “Tool boxes”.

FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly
- Continue to ensure that service recovery key words are being used consistently and effectively across the organization.
- Continue to track service recovery incidents, identify trends and fix processes.
- Maintain and evaluate the service recovery “Tool boxes”.
- At the end of the first year, select a new team leader and begin to rotate new members onto the committee.

FIRST-YEAR ACCOMPLISHMENTS:

- A Service Recovery system is developed and implemented that rapidly identifies and responds to unhappy patients and family members.
- A mechanism to report Service Recovery issues has been established so the incidents may be tracked and system changed or developed that will reduce their reoccurrence.
**PHYSICIAN SATISFACTION TEAM - JOB DESCRIPTION**

**PURPOSE:**
This team is responsible for "wowing" physicians and improving the level of service to them and their patients.

**MEMBERSHIP:**

- Anyone who works with physicians. This team should include a representative from Medical staff Office, major nursing units, high-volume outpatient areas and admitting.
- Suggested Membership total = Ten (10)

**FIRST-MEETING OBJECTIVES:**

- Update and review the organization's service initiative with the committee.
- Review team purpose and goals.
- Review and share organization's purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Brainstorm ways to “wow” physicians.

**QUICK HITS:**

- Implement two things that cost little or no money that will immediately be seen as customer friendly service by the physicians and their office staff. (e.g., new phone line in doctors’ lounge)

**FIRST-MONTH TARGETS:**

- Begin to meet weekly.
- Ask each team member to select six physicians (heavy users and splitters) and informally ask them, “What is the one thing we can do to make it easier for you to practice at our hospital?”
- Record and share the responses and look for trends in what you hear.
- Develop a “target list” of items that could be implemented that would improve physician satisfaction. Attach costs and rank them in order of importance.
- Begin to implement items on this “target list”.

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SECOND MONTH TARGETS:

- Continue to meet weekly.
- Continue to remove barriers for the physicians and office staff and communicate back to the physician.
- Plan and implement a physician event.
- Informally interview other staff members who work directly with physicians to get their ideas on ways to “wow” physicians. Add their suggestions to your target list.

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Implement a system to write thank you notes to physicians on a regular and consistent basis.
- Develop a tracking system for physician complaints and concerns.
- Continue to implement items and make revisions to the “target list”.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Conduct a physician satisfaction survey.
- Continue to implement items and make revisions to the “target list”.
- Hold another physician event.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to implement items and make revisions to the “target list”.
- Hold a joint meeting with the measurement team to review the physician questions on the survey and the data related to these questions.

FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to implement items and make revisions to the “target list”.
- Evaluate success of committee and accomplishment of the first year. Make recommendations for change.
- At the end of the first year, select a new team leader and begin to rotate new members onto the committee.
- Plan and implement a “doctor’s appreciation” event.

FIRST-YEAR ACCOMPLISHMENTS:

- Solve the top two physician complaints.
- Host two successful physician events.
- Develop a formal process for receiving and resolving physician complaints and concerns.
EMPLOYER OF CHOICE TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for helping to make your organization the employer of choice.

MEMBERSHIP:

- Cross-section of employee population
- People who are enthusiastic and loyal to your organization.
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:

- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Brainstorm things that make employees stay at your organization.

QUICK HITS:

- Implement two things that cost little or no money that will immediately be seen as showing value and concern to the employee. (e.g., Cafeteria hours extended, employee parking shuttle, etc.)
- Implement peer interviewing in your entity.

FIRST-MONTH TARGETS:

- Begin to meet weekly.
- Solicit employee input to get started:
  - Ask each team member to ask employees, “What is the one thing we can do to make it easier for you to work here?”
  - Record and share the responses and look for trends in what you hear.
  - Develop a “target list” of items that could be implemented that would improve employee satisfaction. Attach costs and rank them in order of importance.
- Begin to implement items on this “target list”.
- Review current turnover, retention, and 90 day turnover data and establish a baseline and goals.
- Establish metrics related to employee satisfaction that will be measured on a consistent basis. (e.g., current turnover, retention, and 90 day turnover data)
SECOND MONTH TARGETS:

- Continue to meet weekly.
- Gather information on why people in your organization leave and why people in your organization stay:
  - New Hires: Ask, “Why are you accepting the offer?”
  - Existing employees: Ask, “Why do you stay?”
  - Exiting employees: Ask, “Why are you leaving your job?” and “What could have been done so that you wouldn’t be leaving?”
- Discuss the information, analyze and make recommendations for the target list.
- Plan and implement an employee event.
- Review and update metrics related to employee satisfaction.

THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Continue to implement items and make revisions to the “target list”.
- Continue to review and update metrics related to employee satisfaction.
- Implement an employee suggestion or bright idea program to solicit input from the employees.
- Establish a “helping hands” program for all new employees.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Continue to review and update metrics related to employee satisfaction.
- Conduct an employee satisfaction survey.
- Roll out the employee satisfaction data in the next Employee Forum.
- Continue to implement items and make revisions to the “target list”.
- Hold another employee event.
- Implement leader rounds with employees. Educate on key words for leaders to ask:
  - What are we doing well?
  - Are there things we are doing that we could do less of?
  - Are there things that we need to increase doing?
  - Do you have the tools and equipment to do your job?

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to implement items and make revisions to the “target list”.
- Continue to review and update metrics related to employee satisfaction.
- Continue leader rounds with employees.
FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue to implement items and make revisions to the “target list”.
- Continue to review and update metrics related to employee satisfaction.
- Continue leader rounds with employees.
- Evaluate success of committee and accomplishments of the first year. Make recommendations for change.
- At the end of the first year, select a new team leader and begin to rotate new members onto the committee.
- Plan and implement an “employee appreciation” event.

FIRST-YEAR ACCOMPLISHMENTS:

- Solve the top two employee complaints.
- Host two - three successful employee events.
- Conduct an employee satisfaction survey.
- Develop a formal process for receiving and resolving employee complaints and concerns.
- Leaders are rounding with employees on a regular and consistent basis.
COMMUNICATIONS TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for “connecting the dots” for the employee and ensuring that employees fully understand the service initiative and receive consistent and positive communication about the effort.

MEMBERSHIP:

- Cross-section of employee population
- People who are excellent communicators.
- Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:

- Update and review the organization’s service initiative with the committee.
- Review team purpose and goals.
- Review and share the organization’s purpose.
- Set agreed-upon meeting time and attendance policy.
- Establish team meeting ground rules.
- Brainstorm problem areas of communication.

QUICK HITS:

- Reorient the employee newsletter to better represent and communicate the organization’s service initiative to employees.

FIRST-MONTH TARGETS:

- Begin to meet weekly.
- Solicit information from employees:
  - Ask each team member to select six employees from his or her area and ask, “What communication do you need to feel well connected?”
  - Look for trends.
  - Report findings back to the team.

SECOND MONTH TARGETS:

- Continue to meet weekly.
- Perform a communications audit, identifying all the existing communication tools. Team members should become familiar with each communication tool. Discuss how each communications channel can be used or improved to best communicate with the employees.
- Work with CEO and administrative team to plan and support a round of Employee Forums to launch your initiative.
- Assign team members as liaisons to each service excellence team.
THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Evaluate the Employee Forums and begin planning for next quarter’s Employee Forum.
- Establish communication boards across the entity to keep key information and the organization’s goals in front of everyone in the organization. These information boards are best organized and designed around the Pillars.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Keep the communication boards updated and fresh with key information and data.
- Work with CEO and administrative team to plan and support quarterly Employee Forums.
- Reorient the employee newsletter to effectively communicate key information about your initiative.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Work with CEO and administrative team to plan and support quarterly Employee Forum.
- Keep the communication boards updated and fresh with key information and data.
- Continue to include information and updates regarding your initiative in each employee newsletter.

FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Work with CEO and administrative team to plan and support quarterly Employee Forum.
- Keep the communication boards updated and fresh with key information and data.
- Continue to include information and updates regarding your initiative in each employee newsletter.

FIRST-YEAR ACCOMPLISHMENTS:

- Every employee understands the organization’s service initiative and their role in the success of the initiative.
- Three to four Employee Forums have been held.
- Communication boards are implemented around the entity.
- The employee newsletter effectively communicates your organization’s service initiative.
EMERGENCY DEPARTMENT TEAM - JOB DESCRIPTION

PURPOSE:
This team is responsible for bringing the same level of care to all Emergency Department patients.

MEMBERSHIP

• Emergency Department employees and other related departments.
• Suggested Membership total = Ten (10)

FIRST-MEETING OBJECTIVES:

• Update and review the organization’s service initiative with the committee.
• Review team purpose and goals.
• Review and share the organization's purpose.
• Set agreed-upon meeting time and attendance policy.
• Establish team meeting ground rules.
• Brainstorm ways to “wow” Emergency Department patients.

QUICK HITS:

• Implement two things that cost little or no money that will immediately be seen as customer friendly service to the patients and family in the Emergency Department.
• Educate staff to begin using, “Is there anything I can do for you, I have time” key words.

FIRST-MONTH TARGETS:

• Begin to meet weekly.
• Solicit input on ways to improve care.
• Each team member calls six patients and asks how service can be improved.
• Develop key words for each team member to use when calling patients.
• Results are compiled and discussed with the committee.
• Review and familiarize the team with the Emergency Department satisfaction survey questions.
• Meet jointly with the Measurement team to review Emergency Department satisfaction scores and comments and discuss next steps and points of mutual concern.

SECOND MONTH TARGETS:

• Continue to meet weekly.
• Implement nurse leader rounds.
• Search and remove any other surveys that “compete” with the system-wide questionnaire.
THIRD-MONTH TARGETS:

- Continue to meet weekly.
- Ensure nurse leader is rounding in the Emergency Department.
- Implement key words that keep the patient informed regarding delays.

SECOND QUARTER TARGETS:

- Begin to meet bi-monthly if possible.
- Continue nurse leader rounds.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Develop and implement appropriate key words as needed to ensure consistent and positive messages are delivered to the patients and families.
- Begin to identify and problem solve with managers / teams in areas with problems.

THIRD-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue nurse leader rounds.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Continue to develop and implement appropriate key words.

FOURTH-QUARTER TARGETS:

- Continue to meet bi-monthly.
- Continue nurse leader’s rounds.
- Hold one joint meeting with Measurement Team each quarter to discuss issues of mutual concern.
- Continue to develop and implement appropriate key words.
- At the end of the first year, select a new team leader and begin to rotate new members onto the committee.

FIRST-YEAR ACCOMPLISHMENTS:

- Rounding is part of the daily routine of the Emergency Department leader.
- Key words and messages are being used to send consistent and positive messages to patients and families.
- Institutionalized review of Emergency Department questionnaires and follow-up with patients and family members.
- Emergency Department satisfaction team members are the “in-house” experts and serve as consultants to inpatient areas on how to improve satisfaction.