Engaging Staff to Improve Team Performance and Health

Leadership Forum Workshop Session

December 5, 2014
1. Outline
   1. Outline
   2. Introduction
   3. Workshop Notes
   4. Appendix: Engagement Processes for the Session

2. Introduction

The following is a record of a workshop discussion at the December 5, 2013 meeting of Leadership Forum held at the Charlottetown Best Western Hotel.

The focus of the workshop discussion was on how leaders can improve staff engagement. Staff engagement is an area of priority for Health PEI. A number of indicators related to leadership - staff communication were flagged in the 2013 Worklife Pulse survey.

The question for the day was as follow: **As leaders in HEALTH PEI, what do we need to do to help staff hit that sweet spot of optimal team performance and health?**

The approach:

1. Group Brainstorming and affinity process:
   a. Participants individually generated ideas in response to the question and recorded them on post-it notes which were posted randomly to an “Ideas Wall”;
   b. The full group sorted and grouped ideas into themes;
   c. Themes were ranked and prioritized using a nominal group voting process.

2. Carousel Problem Solving Process
   a. The top 4 themes identified under step 1 were selected for further discussion and analysis;
   b. Using a Carousel Problem Solving method, participants completed analysis and problem solving in each of the theme areas (Identify potential solutions; identify barriers to the solutions; Identify ways to overcome the Barriers), then suggested concrete activities or strategies to address the topic.
3. Workshop Notes

### Topic: Tools for Engagement

#### Brainstorming Ideas
- Engage staff at all levels, ask them about their work and how they contribute to quality improvement;
- Engage staff in solving problems – Learn, PBMA, etc
- Facilitate a focused discussion in which they identify functions they perform that are not working for them
- Use data to the extent possible to reflect to staff the work they’re doing ask for input re: what the data says & their suggestions
- Engage + Involve in Decision-Making process
- Empower our staff to make decisions at every level of organization (give them authority).
- Pull team together to address issues & concerns (common objective) vs one-on-one
- Involve staff in appropriating method/level of decision-making - such as input to PBMA, participate in LEAN
- Engage with /w staff.
- Use tools;
- ST Direction
- PT Culture – Results
- Work Life Pulse tool
- Quality Boards

#### Possible Activities/Solutions
- Empower Staff
- Quality Boards
- Household Meetings
- Quality Huddles
- Provincial Shared Drive
- Involve Staff
- MRC
- Face to Face Time-----------------------------
- Have Conversations
- Variety of Methods
- Know Audience

#### Barriers to Solutions
- Shift workers
- Time/Priorities competing
- Recognize “why” engage for input, decision, expectation
- Geographical distances
- Past practices not the accepted norm/culture
- People are cynical
- How we don’t communicate

#### Solutions to Barriers
- Provide effective tools
- Know organizational resources (who to go to)
- Permission to get started (don’t be afraid to fail) – courage
- meet with staff on their time & location
- invite others to participate in engagement process

#### Proposals
- Help staff understand why their engagement and participation is important
- Use active listening / two way communication
- Be visible to the site. (Road Show) (Engage @ same time.)
- Ask staff for LEAN projects tied to strategic plan results
### Topic: Lead by Example - Role Model

#### Brainstorming Ideas
- Lead by example
- Role model positive attitude (about) being part of the overall organization and achievements of individual areas and the organization as a whole.
- Be visible
- Bring them together. Facilitate collective game plan. “Buy in”.
- Live the organization values.

#### Activities/Solutions:
- Do walk throughs & be visible
- Be “present” + “engages” for meetings/discussions
- Model healthy worklife balance
- Always show respect
- Leave on time at the end of the day

#### Barriers:
- Workload demands
- Competing priorities
- Staff in a # of sites
- Stress ++ (not always easy to respectful).
- Habits
- Workplace culture --Valuing this work

#### Solutions to Barriers:
- Prioritize the priorities
- Change the culture
- Monthly Bulletins
- Lead by Example
- Role model positive attitude (about being part of the overall organization & achievements of both individual areas & as a whole, etc)
- Bring team together facilitate collective game plan “Buy-In”
- Live the Organization Values
- Be Visible

#### Proposal: Make the Connection
1. 1 X month every ELT/Directors has lunch with front line staff
2. Measure Impact
3. Permission (Budget implications)
   Planned Approach

*These proposals are directly related to engagement, communication, and recognition too!!*
# Topic: Communication

## Brainstorming Ideas
- Invite Dialogue
- Create Opportunities for dialogue
- Provide opportunities for staff to gather and exchange learnings
- Openly acknowledge + recognize key opportunities for improvement
- Less reliance on electronic communication to share information with front line staff we need conversations
- Make face-to-face connections between executive and frontline staff
- Provide opportunities for staff to brainstorm on solutions to unit’s issues
- Listen; Listen; Listen
- Model Good communication with healthy practices at work
- Create venues to identify positives and how to do more.
- Watch change in behavior/performance ++ end to.
- Provide info/tools in meaningful ways

## Activities/Solutions:
- Team huddles
- Fact-to-Face Exec + all Staff → Walk abouts
- Dedicated time staff meetings – operational + strategic discussions
- Quality boards – well located – promoted
- Multi-media approach e.g. Facebook groups/twitter/Dedicated/group email

## Barriers:
- Time away from patient care
- Lack of physician engagement/participation
- Time
- Multiple Sites
- Lack of Buy-in
- Keep current info
- Staff don’t see how applies to them

## Solutions to Barriers:
- Fact-to-Face need to be priority.
- Investment for long term org. Benefits
- Senior leaders to visit front line staff regularly
- Metrics
- Understand short term permission for and direction expectations
- Develop a proposal that ensures quarterly Face-to-Face interaction with all levels of staff (with in natural work teams)

## Proposal
- Develop a proposal that ensures quarterly face to face interaction at all levels of staff in natural work / team environments.
- Processes
  - Team huddles
  - Walk abouts
  - Team meetings
- Content
  - Operational & Strategic Directions
<table>
<thead>
<tr>
<th>Topic: Recognition &amp; Celebration</th>
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<tbody>
<tr>
<td><strong>Brainstorming Ideas</strong></td>
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<tr>
<td>• Celebrate people sharing their point of view even if it is not what we want to hear</td>
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<td>• Recognize staff shine ‘celebrate!’ Consistently</td>
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<td>• Provide opportunities to listen</td>
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<td>• Acknowledge success &amp; other milestones formally and at random</td>
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<td>• Appreciate great achievements/recognitions</td>
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<tr>
<td><strong>Activities/Solutions</strong></td>
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<tr>
<td>• Awards</td>
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<td>• White board for team recognition</td>
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<td>• Standing item in staff meeting agenda</td>
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<td>• Fun activities; e.g. lunch, coffee breaks</td>
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<td>• Accept fun as part of work</td>
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<td>• Social events</td>
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<td><strong>Barriers</strong></td>
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<tr>
<td>• Risk in Award – Competition = Disappointment = cynicism</td>
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<tr>
<td>• Must be very purposeful</td>
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<td>• Link to goals/values</td>
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<td>• Time</td>
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<td>• Cost</td>
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<tr>
<td>• Geography</td>
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<tr>
<td><strong>Solutions</strong></td>
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<td>• Make recognition meaningful &amp; more personal</td>
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<td>• Cards/notes – sent to person</td>
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<td>• For groups / teams: Stop and acknowledge achievements and successes</td>
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<td>• For individuals - be “on the spot” &amp; “on time”</td>
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<td><strong>Proposals</strong></td>
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<td>• <strong>Transforming Leadership: Education Initiative</strong></td>
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<td>o <strong>Theme</strong>: Small purposeful behaviors = big results</td>
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<td>o <strong>Content</strong>: Include tools for recognizing success; e.g. cards, personal notes, personal + purposeful recognition regarding performance</td>
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<td>o Hat’s off approach: A tool/approach for team members to recognize each other.</td>
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Other Topics and Ideas

Performance Planning & Appraisals
- Discuss with staff to identify their career interests, and assign work that helps them toward their goals
- More and better performance appraisal and development planning at every level
- Provide feedback on how their work impacts on strategic priorities
- Recognize/honor staff’s individual strengths/passion & channel to employment/job
- Ensure every employee has a PD plan
- Provide information, education, tools & support/feedback/recognition

Results
- Provide data (easy to interpret) related to each work area
- Provide clear direction & support to achieve results
- Assign work based on evidence based criteria; i.e. make sure that the work they do is important, not just because it’s a task we’ve been doing for years.
- Connect their daily work to the achievement of the Health PEI Divisional goals/work plan
- Ensure work is aligned with strategic direction of HPEI
- Help staff understand how their day-to-day work connects to strategic priorities
- Challenge employees bit by bit (don’t overwhelm)
- Share the workload
- Help staff PACE the work e.g. what can be deferred for a month?

Professional Development
- Develop community of practice for supervisors re: their role clarification and support
- Establish team norms [rules of game]: Storming; Norming (make it safe place); Forming
- Ensure professional development days annually
- or more often for teams
- Continue to develop our managers
- Role model & encourage balance between work & “non-work” activities & interests both at work & outside of work

Quality and Safety
- Increase use of tools like quality Boards and huddles- promote awareness of priorities and progress to achievement
- Ask staff what they see as needed to get there.
- Engage staff to recognize they are an important part of the overall organization & success of the organization, not just “their job”
- Celebrate Success
- Structured time on management team agendas to discuss challenges
- Review decisions that are unfavorable (i.e. program additions/changes) as a team – use ethics framework for ethical dilemmas
- Foster a sense of fun, spirit & collegiality □ Fun competitions
- Role model staff engagement: set expectations for managers
Leadership Engagement Workshop
(and Tool Kit – Workshop in a Box)

Leadership Forum
Dec. 6, 2013
What is Employee Engagement?

Hmmm… Don’t think so….
What is Employee Engagement?

- Engagement is about involving people in a way that contributes to optimal Team / Organizational Performance and Employee Satisfaction and Health

http://www.youtube.com/user/BlessingWhite?v=gZ3wxgog4nc
Opportunity Wall

As leaders in HEALTH PEI, what do we need to do to help staff hit that sweet spot of optimal team Performance and Health?
Carousel: Team Problem Solving

• In relation to the “Opportunity” or “Challenge”
  ‣ Possible Steps or Solutions
  ‣ Possible Barriers to progress
  ‣ Solutions to Barriers
PROPOSALS

Using the information generated by the full team, generate 2-3 proposals which will address the opportunity or challenge.

› If there is Time - Consider the following:
  - What is the proposal?
  - What Difference (What will improve)?
  - What Activities?
  - What Roles? (Executive, Directors, Managers, Staff)?
  - What Supports? (Consider tools, information, knowledge)
My Take Away

• Question: As a result of today’s presentations and discussions, what ACTION or KEY MESSAGE will I take back to my Organization?

• If there is time today or as you continue to reflect on your approach, you may wish to consider:
  ‣ WHAT: What engagement activities will I carry out? What do I need to do to get started?
  ‣ WHY: What results do I want to improve in my area?
  ‣ WHO: Who will I need to engage / involve?
  ‣ HOW: What tools, information and or supports will I need?
  ‣ WHEN: When will this work be carried out and completed?
  ‣ WHERE: Locations? On the unit floor? Meeting Rooms? Specific facilities?
Leadership Team Engagement Toolkit

TEAM ENGAGEMENT WORKSHOP IN A BOX
Opportunity Wall (Affinity Grouping)

1. **Brainstorm:** On your own, think about the question and write each opportunity you can think of on a post-it – 1 challenge per note. Post your notes on the Opportunity Wall.

2. **Sort:** Once everyone is finished, ask everyone to move the post-it’s down to the flip chart sheets into themes (or Buckets). Encourage People to move notes until a consensus is reached.

3. **Name and Prioritize:** Name each theme and use a group voting method to identify priorities.
Carousel – Team Problem Solving

Logistics
• Create 4 Stations around the room. A station has an 1) Input Sheet and a 2) Proposal Sheet.
• Divide the group into 4 teams, each situated at a station.

Process
• Step 1: In relation to the challenge or opportunity at your station, brainstorm possible steps or activities toward realizing the opportunity. 3 minutes.
• Step 2: All teams move to the next station. Brainstorm possible barriers to the activities or solutions. 3 minutes.
• Step 3: Teams move to next station – brainstorm solutions to barriers. 3 minutes.
• Step 4: Teams move to next station. At this station, teams review all the data provided and generate 2-3 proposals which will address the opportunity or challenge. (10-15 minutes.)

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<thead>
<tr>
<th>Opportunity or challenge</th>
<th>Possible Steps toward realizing the opportunity / addressing the challenge</th>
<th>Possible barriers to progress</th>
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<tr>
<th>Solutions to Barriers</th>
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<tr>
<td>2 to 3 Proposals</td>
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Personal Take Away

Exercise

• Question: As a result of today’s presentations and discussions, what ACTION or KEY MESSAGE will I take back to my Organization or Introduce into my work?

• If there is time today or as you continue to reflect on your approach, you may wish to consider:
  ‣ WHAT: What engagement activities will I carry out? What do I need to do to get started?
  ‣ WHY: What results do I want to improve in my area?
  ‣ WHO: Who will I need to engage / involve?
  ‣ HOW: What tools, information and or supports will I need?
  ‣ WHEN: When will this work be carried out and completed?
  ‣ WHERE: Locations? On the unit floor? Meeting Rooms? Specific facilities?

Process

• Circulate 1-2 Index cards / participant.

• Have participants reflect on the question and record their response on their index card. (4 minutes)

• Have participants discuss their response(s) with another participant. (4 minutes)