

member of the organization has an obligation to create the circumstances and conditions that lead to successful interaction and relationship at the team level (Team Tip 2-4). This requires new structures as well as new insights and behaviors. Each of these must link in a way that creates the environment and circumstances necessary to support the outcomes of team-based activities. Without the convergence of each of these new structures around the relationships of team members at the point-of-service, the relationships between and among teams and the outcomes of their work will be measurably constrained. When these components converge to support the activities of the team, they facilitate not only relationships but also achievement of high quality and meaningful outcomes in the relationships among team members and between the team-based system and those it serves. After all, meeting patients' needs is the purpose of any health care organization.



## TEAM TIP

2.4

### *Partners Across the System*

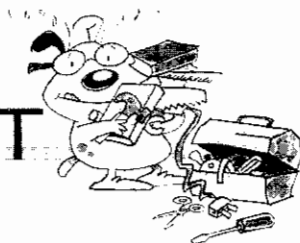
*All partners in a system are members of that system and have rights and obligations to the system and to each other. These rights and obligations must be clearly defined by the members, providing a baseline from which team members can evaluate the team and each other. This establishes the foundation for individual commitment and for group relationships.*

### **Bibliography**

- Ackoff R: *The democratic corporation*, New York, Oxford University Press, 1994.
- Alexander J, Zuckerman H, Pointer D: The challenges of governing integrated health systems, *Health Care Management Review* 20(4):69-81, 1995.
- Ashkenas R et al: *The boundaryless organization*, San Francisco, Jossey-Bass, 1995.
- Aubry R, Cohen P: *Working wisdom*, San Francisco, Jossey-Bass, 1995.
- Beckham D: Ownership—the longest lever, *Healthcare Forum Journal*, 39(1):48-54, 1996.
- Beckhard R, Pritchard W: *Changing the essence: the art of creating and leading fundamental change in organizations*, San Francisco, Jossey-Bass, 1992.
- Belasco J, Gorham G: Why empowerment does not empower: the bankruptcy of current paradigms, *Seminars for Nurse Managers* 4(1):20-27, 1996.
- Beneveniste G: *The twenty-first century organization*, San Francisco, Jossey-Bass, 1994.
- Bennis W, Biederman P: *Organizing genius*, New York, Addison-Wesley, 1997.
- Bolman L, Terrance D: *Reframing organizations*, San Francisco, Jossey-Bass, 1997.
- Chawla S, Renesch J: *Learning organizations: developing cultures for tomorrow's workplace*, Portland, Or, Productivity Press, 1995.
- Cox Jr T: *Cultural diversity in organizations*, San Francisco, Berrett-Koehler, 1993.
- Drucker P: The new society of organizations, Sept/Oct: 95-104, 1992.
- Evans K et al: Whole systems shared governance: a model for the integrated health system, *Journal of Nursing Administration* 25(5):18-27, 1995.
- Galbraith J: *Designing organizations*, San Francisco, Jossey-Bass, 1995.
- Gould J, DiBella A, Nevis E: Organizations as learning systems, *The Systems Thinker* 4(8):1-3, 1993.
- Halal W: *The new management: democracy and enterprise*, San Francisco, Berrett-Koehler, 1996.
- Handy C: *Beyond certainty: the changing world of organizations*, Boston, Harvard Business School Press, 1996.
- Harman W, Porter M: *The new business of business*, San Francisco, Berrett-Koehler, 1997.

- Harrison B: *Lean and mean: the changing landscape of corporate power in the age of flexibility*, New York, Basic Books, 1994.
- Hock D: The chaordic organization: out of chaos into order, *World Business Academy Perspectives* 9(1):5-18, 1995.
- Hurst D: *Crisis & renewal*, Boston, Harvard Business School Press, 1995.
- Jamieson D, O'Mara J: *Managing workforce 2000*, San Francisco, Jossey-Bass, 1991.
- Janov J: *The inventive organization: hope and daring at work*, San Francisco, Jossey-Bass, 1994.
- Keidel R: *Seeing organizational patterns*, San Francisco, Berrett-Koehler, 1995.
- Kets de Vries M, Miller D: *The neurotic organization*, San Francisco, Jossey-Bass, 1984.
- Kim D: *Toward learning organizations*, Cambridge, Mass, Pegasus Communication, 1992.
- Korten D: *When corporations rule the world*, San Francisco, Berrett-Koehler, 1995.
- Lawler, E, Mohrman S, Ledford G: *Creating high performance organizations*, San Francisco, Jossey-Bass, 1995.
- Lawler III E: *Motivation in work organizations*, San Francisco, Jossey-Bass, 1994.
- Luthans F, Hodgetts R, Lee S: New paradigm organizations, *Organizational Dynamics* 22(3):5-19, 1994.
- Marszalek-Gaucher E, Coffey R: *Transforming healthcare organizations: how to achieve and sustain organizational excellence*, San Francisco, Jossey-Bass, 1990.
- Merry M: Shared leadership in healthcare organizations, *Topics in Health Care Financing* 20(4):26-38, 1994.
- Mink O et al: *Open organizations*, San Francisco, Jossey-Bass, 1994.
- Mohrman S, Cohen S, Mohrman A: *Designing team based organizations*, San Francisco, Jossey-Bass, 1995.
- Mohrman S, Mohrman A: *Designing and leading team based organizations*, San Francisco, Jossey-Bass, 1997.
- Nielson D: *Partnering with employees*, San Francisco, Jossey-Bass, 1993.
- Nirenberg J: *The living organization: transforming teams into workplace communities*, Homewood, Ill, Irwin Professional Publishing, 1993.
- Nolan R, Croson D: *Creative destruction: a six stage process for transforming organizations*, Boston, Harvard Business School Press, 1995.
- Oshry B: *Seeing systems, unlocking the mysteries of organizational life*, San Francisco, Berrett-Koehler, 1995.
- Pauchant T, Mitroft I: *Transforming the crisis prone organization*, San Francisco, Jossey-Bass, 1992.
- Pedersen A, Easton L: Teamwork: bringing order out of chaos, *Nursing Management* 26(6):34-35, 1995.
- Poirier C, Reiter S: *Supply chain optimization*, San Francisco, Berrett-Koehler, 1996.
- Schein E: On dialogue, culture, and organizational learning, (AU: JOURNAL TITLE??) 22(2):40-51, 1993.
- Shortell S et al: The holographic organization, 36(2):20-25, 1993.
- Treece J: Breaking the chains of command: when information technology alters the workplace, *Business Week* p. 112-114, 1994.
- Vogt J, Murrell K: *Empowerment in organizations*, San Diego, Calif, University Associates, Inc, 1990.

# TOOLCHEST



## TOOL A: Checklist for Integration

Health care organizations are in the midst of developing integrated team-based approaches across the continuum of care. All transformation and integration related to integration depends on:

1. The strategies that are undertaken to respond to the demand for change
2. The unique culture and characteristics of the organization as it addresses this change
3. The willingness and ability of the organization to undertake its necessary activities in order to adjust and adapt to its dynamic changing circumstances

### INTEGRATION CHECKLIST

**Instructions.** Each of the following items should be identified and checked off as part of successful integration processes. It is critical that each element in integrating team-based approaches be in place and support the team-based activities.

1. Identification of the environmental and market forces that create the conditions for change and the necessary response to them.

Initiation of horizontal collaborative systems rather than institutional competition.

Reduction in all high-end cost and excess capacity, impeding the organization's responsiveness to change.

Tightening of the framework of workers and creation of a closer alignment of the number of workers with the leanness of the organization.

Provision of broad-based, comprehensive range of service, facilitating access between payers, providers, and consumers.

Reduction of cost in as many places as possible.

Advanced pricing formulas, first introduced through discounting processes and later unfolding as advanced and fixed pricing mechanisms for the organization.

Sufficient availability of capital for investing in horizontally aligned health care service across the continuum of care.

2. Response to individual systems' culture and environment.

The system builds on the mission, purposes, and objectives of its community responsibility for providing health care for a defined population over a range of services.

\*Copyright 1994 Tim Porter-O'Grady Associates, Inc. Any duplication or use of this instrument without the express written permission of Tim Porter-O'Grady Associates, Inc., is strictly prohibited.

Copyright 1994 Cathleen Krueger Wilson, PhD and Tim Porter-O'Grady PhD, FAAN.

Each participant has a defined role and accountability in the system, including group, organization, and individual provider participants.

An organizational model and framework for integrated delivery of care is point-of-service-driven, team-based, and integrated across the continuum of service.

A planned, carefully constructed transition from the old health care system to a new model of integration is defined and outlined.

There are clearly delineated clinical pathways, or centers of excellence, where specific population-based services are provided.

There is clear linkage between all systems services and support services driven by a strongly developed information infrastructure.

Management structures are diminished, limited, and efficiently defined, so that there are as few managers as the system requires.

The system represents a full range of comprehensive services to the community or population it serves and becomes a one-stop health care system for its consumers.

Team-based approaches, standards, and decision making are facilitated across the system in effective clinical models representing clear delineation of points of service.

Physicians are involved in every phase of the

clinical process and development and are incorporated in all decisions that affect the design and service structure of the system.

3. A new organization emerges with a new organizational culture and mindset.

The change is difficult, requiring time, patience, and consistency. Leadership expresses this.

Team-based approaches align and create incentives for team members to fully participate and express ownership in the change.

All integration is relationship-building. The organization, increasingly, is a horizontal, relationship-driven entity.

Structuring based on the value of relationships is critical to the success of the system.

Systems approaches require a view of the whole rather than of the parts.

Comprehensive integrated, aligned arrangement of services and structures should reflect the whole commitment of the organization's specific service to its community.

Integration is a journey, not an event. It continues to adjust, change, modify, moderate, and advance as each stage unfolds.

Each of the elements are critical to effective change in the organizational system and must be addressed as part of building the team-based approach.

## **TOOL B: Confronting the Team-Building Myths**

In *Team Building for the Future*, R.L. Elledge and S.L. Phillips\* identify 20 myths of team building. Each of these myths represents a particular set of

behaviors that build on the myths. This exercise takes those 20 myths and asks questions about their legitimacy in the team-building process in any organization. Building team process on truth, frank-

\*Elledge RL, Phillips SL: *Team building for the future*, San Diego, Pfeiffer & Co, 1994.

ness, and clarity is an important construct for sustainable teams. Making sure that myth is not present is critical to the effectiveness of team process.

#### ***Myth No. 1***

Facilitators are objective third-party consultants. How do you generate this myth in your organization?

Do you support the facilitator as a human being? Do you allow for growth and development of the facilitator?

Is the facilitator vulnerable and open to growth and change?

#### ***Myth No. 2***

Facilitators will transfer their team-building skills to the team.

Does the facilitator have sufficient skill to transfer?

Is the facilitator confident of his or her skills?

Are the processes of skill transfer in place within the team?

Does the team trust the facilitator enough to look to her or him for skill transfer?

Is a format available for the transfer of skills to team members?

#### ***Myth No. 3***

Teams develop in a steady, predictable series of phases.

Do the issues of growth get reflected in the concerns that the team raises?

Is the team allowed to revisit issues when it continues to have problems?

Is the team's developmental cycle evaluated for the effectiveness of team members and their learning?

Is learning a dynamic process depending on the needs of the team and the timing of those needs? Does the team change its structure and format if they no longer fits its needs?

If interaction is a problem, can the team change its process and format to facilitate it better?

Is the team allowed to go back and forth as needed to address what it does well and the developments that it has yet to address?

Can the team evaluate its effectiveness and adjust its processes according to its results?

Can the team accommodate the growth needs of an individual member, allowing time for change to occur but requiring change nonetheless?

Does the team realize that change is highly adjustable and cyclical?

Is the team willing to do remedial work and address concerns that affect advanced work on the team?

#### ***Myth No. 4***

All effective leaders undertake team building.

Do leaders understand the team-building process?

Does the leader monitor and adjust his or her skill based on the team's development?

Has the team leader participated in planning for activities related to team building?

Has the team leader identified specific skills he or she needs in the team-building process?

#### ***Myth No. 5***

All team members are equal in team-building interventions.

Does the leader include all team members in dialogue?

Have all team members participated in identifying their team's learning objectives?

Are the roles of team members clear enough for members to know what development they must undertake?

Will the team be willing to engage team building as an endless, timeless process?

Is the team willing to clarify and communicate the issues of concern as they arise, realizing they may set the team back developmentally?

Can the team deal with a sometimes schizophrenic roller-coaster ride between effectiveness and developmental needs?

Can the team adjust to the changing work requirements and the environmental changes that either impede or facilitate team process?

Can the team live with the continuously dynamic, ever growing need to adjust skills, change behaviors, and advance the process of the team?

### ***Myth No. 6***

Teams change, adjust, and improve their operations and then restabilize.

Is it understood that the team moves incrementally and noncharacteristically between all stages of development?

Is there a model for change that the team uses to validate its shifts and growth?

Can the team live with the chaos and complexity associated with change?

### ***Myth No. 7***

In team building, consensus decision making is always best.

Is there a consensus process within the team?

Does the team know how to use the consensus process?

Is there a method for conflict resolution?

Is solution seeking the framework for team process?

Is there method and technique applied to consensus building in the team?

### ***Myth No. 8***

Teams can perceive, analyze, and decide in a logical deductive manner.

Are there a method and framework for problem solving in the team?

Are the problem activities of the team associated with its plan?

Are the individual objectives of members consistent with those of the team?

Do the team's process and outcomes fit with the purposes and goals of the system?

Is there accommodation for the adjustments and changes that invariably occur in any system?

### ***Myth No. 9***

An objective reality exists that can be understood.

Is there a clear understanding that reality is not a straight line?

Do people look at the whole rather than simply the parts?

Can team members read the signposts of change rather than focus only on the end point?

Does the team honor a variety of perceptions, including subjective and changing perceptions?

### ***Myth No. 10***

The factors that influence our perceptions are fully known.

Is there respect given to the growth that comes from discovery?

Is it safe on the team to ask for clarification?

Do team members clearly understand the meaning of the issues under discussion?

Is there generalized agreement on the awareness of the team around the issues of discussion?  
Is there a way to build perception more strongly as the team seeks consensus?

***Myth No. 11***

All team members must be fully committed to the team's vision and goals.  
Is there room for diversity and a variety of perceptions around how the team achieves its goals?  
Is there commitment to determination of common efforts around goals?  
Can the team allow a minority of perceptions that do not generally agree with those of the majority of team members?  
Does the team have a way of getting clear ideas of those different perceptions that contribute to good dialogue?  
Is diversity on the team expected and honored?

***Myth No. 12***

One person's performance can be looked at independently of another's.  
Is there realization that team members are interdependent?  
Can team members honor the perceptions of others in a way that incorporates it into the work, solution seeking, planning, or problem solving?  
Do individual members see themselves as part of the team?  
Does a feedback mechanism exist to support the contributions of team members?  
Can the separateness of individuals coalesce around a common set of goals?

***Myth No. 13***

Synergy is the end result of team work.

Is there room for the growth of cooperation and inspiration?  
Is there an understanding that each individual makes a contribution to the whole?  
Is it clear what the expectations for performance are for each individual?  
Does the team accommodate the development of individuals toward its goals and outcomes?

***Myth No. 14***

A team-building facilitator enables a team to learn about itself.  
Is there room for "what if" scenarios in the learning process?  
Does the team facilitator have a variety of techniques that help the team past its barriers?  
Does the team respect the facilitator's work?  
Does the facilitator incorporate the notions of diversity of perception and role into problem solving?  
Does the facilitation result in advancing the team's skill set and independence in making its own decisions?

***Myth No. 15***

A team-building intervention is controlled by the team's leader.  
Does leadership always rest in the hands of the team facilitator or coordinator?  
Is leadership allowed to emerge as needed within specific processes of the team's work?  
The data collected from a team are always confidential and anonymous.  
Is it clear which data are confidential and which data are not?  
Should all data be anonymous, or can it be determined which are and which are not?

Can work process and data related to it ever be fully confidential?  
 How open should sessions be; how closed should they be?  
 When confidential information is shared is there a mechanism for ensuring it remains confidential?

**Myth No. 16**

Interventions are designed to fit the needs of the team.  
 Is the team clear about what interventions or actions result in meaningful outcomes?  
 Is there a variety of styles that fit the needs of the team regarding its leadership?  
 Does the facilitator exhibit skill in confronting issues?  
 Can the facilitator demonstrate empathy?  
 Is the facilitator good at encouraging the team in analyzing its own processes?  
 Is the facilitator articulate?

**Myth No. 17**

Trust is dependent on complete openness and candor.  
 Does the team understand that trust is the result of good team dynamics, not its cause?  
 Can trust be enumerated once the team focuses on identifying it?  
 Does the team trust that diversity will lead to appropriate integration and meaningful outcomes?  
 Is the team clear about its expectations and relationships?  
 Is there an individual team member development plan that can be used to evaluate effective team building?  
 Is there discipline that allows for intervention when team building indicates a problem?

**Myth No. 18**

Facilitators work with a variety of options for team structures and interactions.  
 Does the team know the level of creativity and innovation used in facilitating its process?  
 Does the team reflect a tightness of fit between its design and the culture it serves?  
 Is the team fluid and flexible in design in the application of its work?  
 Does the team assess the effectiveness of its facilitation and the congruence with its outcomes and work?

**Myth No. 19**

Is leadership facilitated by the coordinator and facilitator of the team?  
 Does the team's leadership change periodically in order to create a dynamic growth of leadership on the team?  
 Can the facilitator encourage the emergence of leadership in others as a part of his or her work?

**Myth No. 20**

Team building is a continuous process.  
 Does the team realize that team building is a dynamic?  
 Does the team have a measure of its successes?  
 Does the team know how to deal directly with its failures?  
 Each of these myths raises questions about the team's own reality and its possibility for success. Team development must continually address its interactions, behaviors, formats, and functions.



## TOOL C: Shared Governance Staff Assessment Instrument

**Instructions:** This instrument provides you with the opportunity to assess your work roles and behaviors within the context of a shared governance organizational framework. This assessment provides you with an opportunity to determine the impact of shared governance on your work and role.

To use this instrument read the statements carefully. Choose your answer after consideration by selecting the response that best matches your personal feelings and the extent to which you agree with the statements below. Mark the corresponding space on your response sheet. Please complete all the statements and remember, you cannot be identified, so be frank in selecting the response that matches as closely as possible to your own view.

### Part A: Survey

1. Shared governance is a system of management that allows staff participation.	1	2	3	4	5
2. Shared governance changes the way we relate to each other.	1	2	3	4	5
3. In shared governance, staff members make more decisions.	1	2	3	4	5
4. Our organization sincerely wants shared governance to work	1	2	3	4	5
5. Staff will never let shared governance work here.	1	2	3	4	5
6. I believe in shared governance.	1	2	3	4	5
7. Shared governance is the key element in what keeps me working here.	1	2	3	4	5
8. Shared governance is just a fad that won't last long.	1	2	3	4	5
9. The processes associated with shared governance are consistent with my manager's style of management.	1	2	3	4	5

### Part B: Attitudes

On a scale of 1 to 10, with 1 the lowest and 10 the highest, please rank the following:

1. I believe the overall commitment to shared governance in this organization ranks \_\_\_\_.
2. I believe the quality of interpersonal relationships in this organization rank \_\_\_\_.
3. I believe the overall leadership ability in this organization rank \_\_\_\_.
4. I believe the emphasis on effective problem solving in this organization ranks \_\_\_\_.
5. I believe the concern for the process of shared governance ranks \_\_\_\_.
6. My level of satisfaction with this organization ranks \_\_\_\_.

Any question you do not understand or do not have sufficient information to answer, please leave blank.

**Part C: Demographics**

1. My current role here is:
  - ☐ Staff nurse
  - ☐ Specialist (not a manager)
  - ☐ First line manager (responsible for one unit)
  - ☐ Other manager (responsible for more than one unit)
  - ☐ Senior manager (responsible for entire division)
  - ☐ Other \_\_\_\_\_.
2. My regular unit is \_\_\_\_\_.
3. My regular shift is \_\_\_\_\_.
4. I have worked this shift for \_\_\_\_ years.
5. I have worked for this organization for \_\_\_\_ years.
6. I work here primarily because:  
(Select only one.)
  - ☐ It is convenient.
  - ☐ Pay and benefits are good.
  - ☐ Satisfying work environment and relationships.
  - ☐ I have to work and this is as good a place as any.
  - ☐ I do not like working here.
  - ☐ Other \_\_\_\_\_.
7. If I left here it would be primarily because:  
(Select only one.)
  - ☐ I was offered a better job.
  - ☐ Better pay and benefits.
  - ☐ More work satisfaction.
  - ☐ I was unhappy working here.
  - ☐ Spousal transfer or domestic situation.
  - ☐ I need a change.
  - ☐ Other \_\_\_\_\_.
8. I typically work \_\_\_\_ hours per week.
9. My age is \_\_\_\_ years.
10. My highest level of formal education is:  
(Select only one.)
  - ☐ High school
  - ☐ Vocational or technical school
  - ☐ Community college program
  - ☐ Diploma program
  - ☐ University degree
  - ☐ Graduate degree
11. I am currently taking classes:
  - ☐ yes    ☐ no    (Select only one.)If yes, then please answer the following question: I am studying: \_\_\_\_\_.
12. I have participated or been involved in shared governance in the following ways:  
\_\_\_\_\_  
\_\_\_\_\_.
13. If my involvement in shared governance has been minimal or not at all, it is because:  
\_\_\_\_\_  
\_\_\_\_\_.
14. Please comment about this questionnaire. Feel free to include anything you think will improve it or will address your issues more fully:  
\_\_\_\_\_  
\_\_\_\_\_.
15. If you feel an important question was not asked, please write it for us so that we might assess it for future preparation.  
\_\_\_\_\_  
\_\_\_\_\_.

# TOOL D: Survey of Shared Leadership Practices

**Instructions:** This is a survey of your manager's practices and whether or not she or he engages in behaviors that allow you to do your best work in a shared leadership organization. You may also use this tool to evaluate your council or shared decision making group leaders, as well as to facilitate the group to do its best work.

Managers and leaders in empowered organizations purposefully engage in behaviors that enable staff members to effectively meet their professional accountabilities. The items in this survey have been carefully selected as representative of these shared leadership practices. Please examine each scenario and reflect on how characteristic it is of your manager or group leader, by thinking about how frequently she or he engages in this behavior.

To the right of each scenario, you are asked to make two sets of ratings:

**Actual:** Your assessment of how frequently your manager is actually engaged in shared leadership behaviors.

**Desired:** Your assessment of how often, in order for you to meet your professional accountabilities, you would like your manager to be using a certain shared leadership practice.

Read each scenario and record both an actual and a desired assessment in the boxes located in the *right margin* of this survey.

Use the following scales in making your own assessments:

- |                  |                |
|------------------|----------------|
| 1. Always        | 5. Sometimes   |
| 2. Nearly always | 6. Hardly ever |
| 3. Frequently    | 7. Rarely      |
| 4. Half the Time |                |

Actual ☐ ☐ ☐ ☐ ☐ ☐ ☐

Desired ☐ ☐ ☐ ☐ ☐ ☐ ☐

1 2 3 4 5 6 7

1. Actively seeks opportunities to help staff groups who are trying to achieve a goal. Eases groups through a process to accomplish goals. Remains neutral and helps the group stay focused.

Actual ☐ ☐ ☐ ☐ ☐ ☐ ☐  
Desired ☐ ☐ ☐ ☐ ☐ ☐ ☐

2. Recognizes that the work of groups is based on each staff member's attitudes, commitment, values, and skills. Enthusiastically works to bring these into the problem-solving process.

Actual ☐ ☐ ☐ ☐ ☐ ☐ ☐  
Desired ☐ ☐ ☐ ☐ ☐ ☐ ☐

3. Clearly spells out her or his won facilitator roles and responsibilities to shared leadership groups.

Actual ☐ ☐ ☐ ☐ ☐ ☐ ☐  
Desired ☐ ☐ ☐ ☐ ☐ ☐ ☐

4. Observes the various roles that group members play in groups, the methods that they use in decision making, and their communication patterns. Freely shares this information with the group to help them to work better together.

Actual ☐ ☐ ☐ ☐ ☐ ☐ ☐  
Desired ☐ ☐ ☐ ☐ ☐ ☐ ☐

- |   |         |   |
|---|---------|---|
| 5. Always protects individuals and their ideas from attack by other staff members. Through her or his own words and actions, communicates the dignity and the individual worth of each person and confidence in her/his ability to make a contribution. | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 6. Assists staff to develop their skills but does not direct or take responsibility for people's skill development. Encourages staff to try new ways of working without fear of failure.  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 7. Suggests to staff members the opportunities to expand their skills. Conveys to each person that her or his work is central to the success of this organization.  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 8. When coaching people, the manager's conversation makes sense, follows logic, and communicates that the manager is giving the staff her or his undivided attention.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 9. Sets time aside to assist staff members and work groups to develop their skills. Is approachable and available when needed. Does not remain aloof.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 10. Clearly communicates to staff members any performance problems. Focuses on solutions rather than problems. Does not become emotional or critical when confronting staff. Protects people's self-esteem when discussing performance problems.        | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 11. Really listens to staff. Asks questions to clarify understanding of other people's points of view. Does not interrupt or let mind wander during conversations.  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 12. Stimulates reluctant staff members to participate by drawing them out and engaging them in active dialogue.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Dimension I ☐ Total Score Actual

☐ Total Score Desired

13. Works hard to gain support for her or his own ideas. Does not manipulate or withhold information to advance her or his own ideas.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Spends little time worrying about what the “higher-ups” are thinking. Bravely represents people and groups, even if the issue is unpopular with senior management.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Always puts people first. Is fair and consistent in treatment of others. Shows no favoritism. Helps people avoid conforming to social pressures at work.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Can be counted on to follow up. Keeps commitments and is respected for honesty. People know what she or he believes.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Solicits feedback about impact on others. Responds nondefensively to criticism about her or his own actions.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Communicates a leadership vision in a way that inspires others to act. Has a strong sense of purpose. Can describe how her or his own work and the work of others contribute to the achievement of the organization’s mission.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Communicates self-respect and personal commitment to doing the best job possible. Openly works to resolve staff difficulties with her or his leadership style.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Sees power as available to everyone rather than a limited resource. Assumes that staff members are accountable, with the necessary freedom and authority to do their work. Affirms the personal power of each individual.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Frees staff members to collaborate and share in decision making. Gets staff personally involved in the work to be done. Accepts staff’s control of the content and pace of their own work.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Works hard to eliminate policies, procedures, or systems that interfere with getting the job done.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Translates the principles of empowerment to staff through role-modeling and fulfilling expectations of staff decision-making groups.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Questions staff members regularly regarding their understanding and participation in empowerment activities.	Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Dimension II** ☐ **Total Score Actual**

☐ **Total Score Desired**

- |   |         |   |
|---|---------|---|
| 25. Communicates to everyone well-defined and clear goals for change. Freely provides information for the duration of change.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 26. Establishes and then coaches staff work groups to manage the changes that affect their work.  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 27. Ensures that change is not disconnected from organizational realities by obtaining the necessary commitment, people, materials, and financial support before embarking on change.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 28. Assists staff in using project management processes to set timelines, allocate resources, prioritize actions, and assign responsibilities.  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 29. Helps staff identify specific and measurable outcomes to track successes and failures. Sees failures as opportunities for learning. Facilitates staff's progress in evaluating themselves and unit outcomes.                  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 30. Acts consistently on the belief that every person helps design her or his own work. Instead of informing people of a better way to do their jobs, staff members are coached by the manager to invent their jobs themselves.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 31. Re-thinks work from the customer's focus. Helps staff design systems of work that are flexible, reflect what customers desire, and provide meaningful work for each person that is cost-effective.                            | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 32. Encourages staff on different units, departments, or different shifts to organize their work differently, depending on skill mix, people availability, and so on. Recognizes that there is more than one way to "skin a cat." | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 33. Avoids rigid or fixed ways of doing work. As conditions change, helps the staff re-invent the way work is performed as they learn and as the world changes.   | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| 34. Confronts negative staff members with the truth about changes in work expectations and empowerment activities.  | Actual  | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
|   | Desired | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |

Dimension III ☐ **Total Score Actual**  
☐ **Total Score Desired**

35. Directly addresses objections to participation in decision making, countering staff members' objections to participation in decision making.
36. Staff decision-making meetings are held at least monthly to deal with staff accountability issues.
37. Provides staff members access to information, resources, and time, at least weekly, regarding organizational changes. Asks for response and feedback from staff.
38. Incorporates people from every staff role into discussions about patient care and staff work.
39. Communicates budget and financial information regularly to the staff. Keeps them informed about changes in finance affecting their work and lives.
40. Always helps the staff include financial or resource components in every decision.
41. Provides staff members with the time to attend staff decision-making group meetings. Actively and enthusiastically embraces their participation in staff decisions.
42. Shares with staff her or his own accountabilities and performance expectations as a manager. Seeks feedback regarding leadership performance.
43. Communicates activities, concerns, manager's role, and issues with the medical staff. Has an ongoing and regular pattern of communication with doctors.
44. Creates an environment where staff feel connected to their manager and feel great working with and relating to her or him.
45. Unit runs well. Staff and management generally relate well. Together, they confront change positively, with good results.

Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Dimension IV** ☐ **Total Score Actual**  
☐ **Total Score Desired**

**Instructions for Scoring Your Self-Assessment of Shared Leadership Practices****Part I**

The self-assessment of *Shared Leadership Practices* assesses your managerial or leadership practices along four core Dimensions, and whether or not they are productive. A total score for the survey can be computed as well as a separate score for each Dimension.

1. Please total the scores on your self assessment for each component, and place in the box below.
2. Add your Dimension scores together to get a total score.

**Dimension I**

Facilitating and Coaching

**Dimension II**

Empowerment

**Dimension III**

Change Management

**Dimension IV**

Shared Leadership Principles

**TOTAL I-IV**

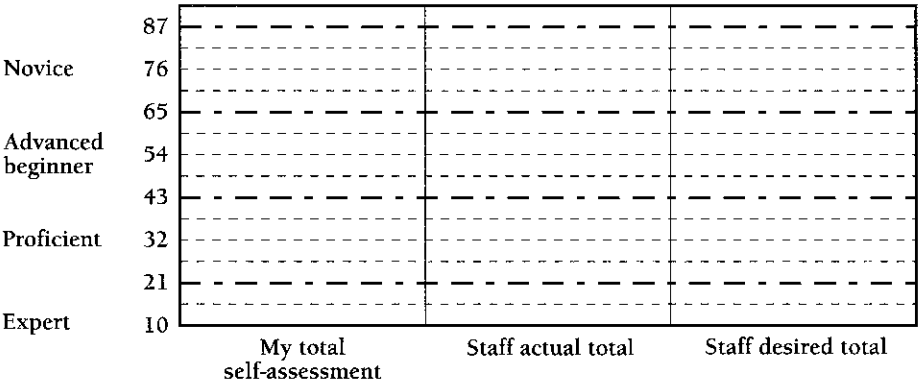


Instructions for Scoring Part II

- 1. Now total the performance scores from your staff survey.
- 2. Record your self assessment scores from the previous page in the appropriate box below.
- 3. For each Dimension, add together the staff actual scores for all of your staff surveys. Divide this number by the numbers of surveys returned. Enter the mean score in the appropriate box below. Repeat this exercise for the staff desired scores.
- 4. Record total scores by adding the Dimension scores you had recorded in the previous steps.

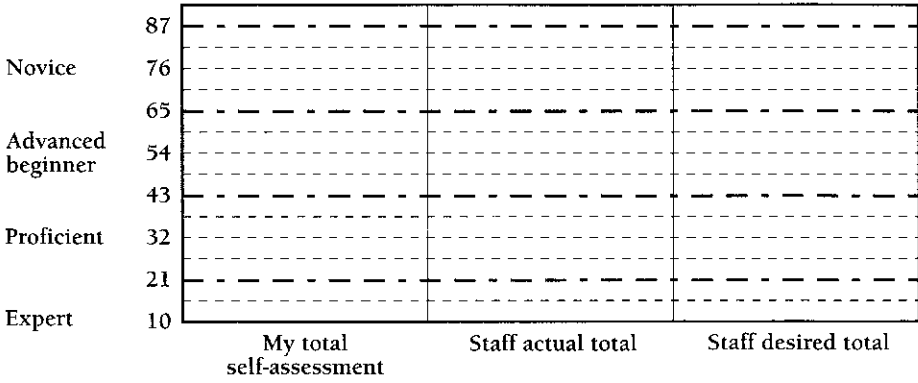
	My Self Assessment	Staff Actual	Staff Desired
<b>Dimension I</b> Facilitating and Coaching	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Dimension II</b> Empowerment	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Dimension III</b> Change Management	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Dimension IV</b> Shared Leadership Principles	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>MY TOTAL SCORES</b> Dimension I-IV	<input type="text"/>	<input type="text"/>	<input type="text"/>

HOW DOES MY STAFF FEEDBACK COMPARE WITH MY SELF-ASSESSMENT OF MY FACILITATION AND MY COACHING SKILLS?



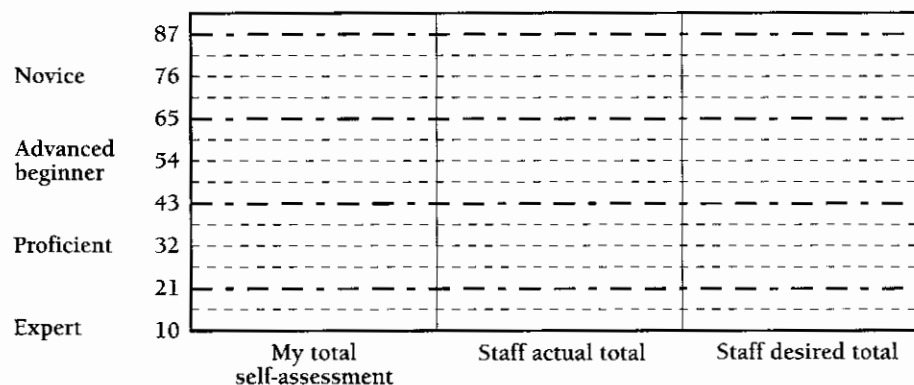
Instructions: Plot your *Self*, *Staff actual*, and *Staff desired* scores for Dimension I on the graph.

HOW DOES MY STAFF FEEDBACK COMPARE WITH MY SELF-ASSESSMENT OF MY EMPOWERMENT SKILLS?



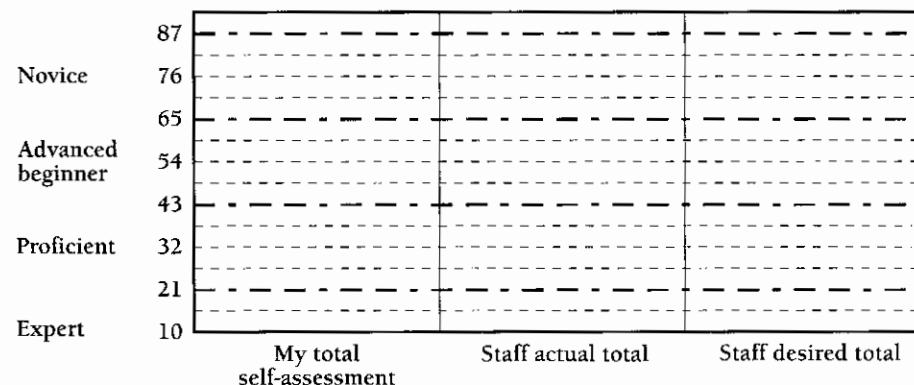
Instructions: Plot your *Self*, *Staff actual*, and *Staff desired* scores for Dimension II on the graph.

### HOW DOES MY STAFF FEEDBACK COMPARE WITH MY SELF-ASSESSMENT OF MY APPROACH TO CHANGE?



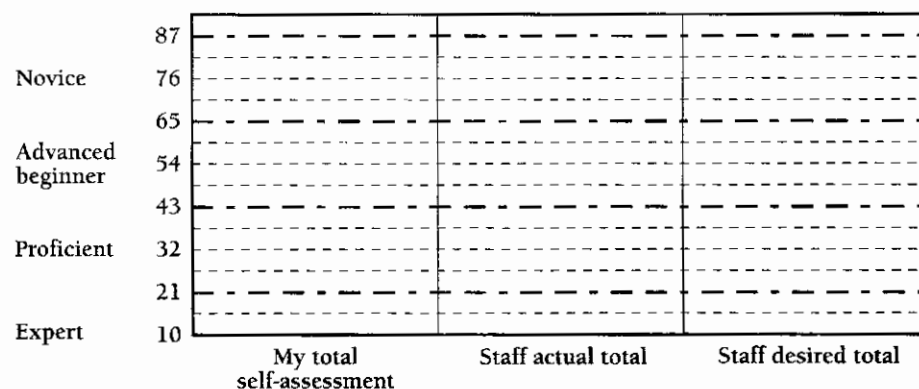
Instructions: Plot your *Self*, *Staff actual*, and *Staff desired* scores for Dimension III on the graph.

### HOW DOES MY STAFF FEEDBACK COMPARE WITH MY SELF-ASSESSMENT OF MY APPLICATION OF SHARED LEADERSHIP PRINCIPLES?



Instructions: Plot your *Self*, *Staff actual*, and *Staff desired* scores for Dimension IV on the graph.

# **HOW DOES MY STAFF FEEDBACK COMPARE WITH MY SELF-ASSESSMENT OF SHARED LEADERSHIP PRINCIPLES?**



Instructions: Plot your overall *Self-assessment*, *Total staff actual*, and *Staff desired* scores on the graph.