

Self-Assessment Guide
Module 1:

ORGANIZATIONAL ASSESSMENT - *Leader self-assessment*

OBJECTIVES:

By the end of this assessment module, the facility's leadership will have:

1. Identified his/her own goals re: moving the organization toward a culture change;
2. Determined if s/he is ready for culture change;
3. Evaluated personal strengths and areas in need of development in the qualities of exemplary leadership; and
4. Defined the next steps to assess his Leadership Team.

STEPS OF ENGAGEMENT BY LEADER:

Review Training Packet. Leader may personally review this packet for its potential for the organization, and/or bring a small team together to study the use of this module.

Planning Meeting:

Action 1: Leader and Facility Leadership Team review the module. Is it appropriate and timely? What other training pieces might be included.

Action 2: Review the purpose of the Assessment. Remind that the appropriate role for leadership is supportive and facilitative.

Paraphrase:

Our Goal is to accomplish an assessment of the organization. This will help us determine our readiness for culture change in our organization (the Eden Alternative or other). This module's entire focus is to assist us in accomplishing our growth and learning goals for ourselves, as a leadership team. We are committed to NOT criticize or judge, but to provide genuine support in our learning endeavors. The Assessment begins with the Administrator, moves to the Leadership Team, and then, with their assistance, moves deep into the organization. We stress the concepts of **High Involvement** (Deming) to accomplish this self-assessment. In other words, we want to involve more and more of our facility's community - involving our leadership team, then all levels of staff, involving residents, residents' families and the larger community.

content

procedures

time/material

Concepts to Emphasize:

6 QUALITIES OF CULTURE CHANGE LEADERSHIP:

- GROW AWARENESS IN SELF AND OTHERS
- INSPIRE AND MOTIVATE THROUGH STORY
- SHAPE A VISION TOGETHER
- INVOLVE ELDERS, THEIR FAMILIES, STAFF
- BUILD A COMMUNITY; CREATE TEAM
- SHOW THE WAY BY WALKING THE TALK

Senior Leader of the facility reviews these materials and adapts them to conduct an organizational assessment and facilitate a leadership retreat

Review prepared packet

Module 1
Packet:
~ Organizational Assessment Guide
~ Description of High Involvement Techniques
~ Assessments:
- Leader Self-Assessment
- Personal checklist-*Am I Ready?*
- Organizational warmth

Review Module together

60 minutes

State Purpose for a Retreat:
An Organizational Assessment;
Determine Readiness for Culture Change;
Build High Involvement and Community.

content	procedures	time/material
<p>Action 3: The Leader's reasons for doing this Assessment should be explored by the leader first and then shared with the team. Do your goals include Culture Change? Is your understanding deeper than fur and feathers? Have you taken the Eden Alternative™ training or any other culture change workshops? Are you committed to culture change? Are you focused on the need to develop a stronger sense of community?</p>	<p>Leader determines and articulates his/her Goals</p>	
<p>Action 4: The Leader honestly evaluates self using <i>The Self-Evaluation</i> included in the packet which serves as a guide for self-assessment, sharing and discussion. If done before the Planning Team meeting, Leader may share some of his/her personal findings. ,</p>		
<p>Action 5: Adjust your design of Leadership Retreat based on indications from self-evaluation.</p>	<p>Reviews design for Leadership Retreat and makes tentative adjustments based on your leadership, the facility.</p>	
<p>Determine place, length, time, materials.</p>	<p>Determines place, time. Determines materials that will be helpful</p>	<p>Determine Leadership Retreat Space:</p>
		<ul style="list-style-type: none"> • Comfortable space where interruptions are at a minimum; • Room for everyone to sit around a table and see and hear each other; • Additional space available where all participants can pull chairs into a circle; and where smaller break-out groups can meet. • Outdoor space should always be viewed as an asset - even if just for breaks.

Self-Assessment Guide

Module 1:

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ORGANIZATIONAL ASSESSMENT - Leadership self-assessment

OBJECTIVES:

By the end of this assessment module, all members of the Leadership Team will be able to:

1. Integrate their personal visions with vision of the organization;
2. Welcome the "big picture" responsibility of improving the climate throughout the facility;
3. Self-assess strengths and identify areas in need of development; and
4. Describe the qualities of exemplary leadership.

THREE HOUR LEADERSHIP RETREAT:

Introductions:

Why are we here? Leader shares with Leadership Team (or special team with culture change goals) his/her interest in bringing about culture change, describing what and why. How the Leadership Team is vital to bring about these changes.

Ice-Breaker:

Introduces Participants: Asks to go around the circle and each to introduce oneself in a new and different way than they've done before - perhaps by telling a story that touched their hearts in a way to make them glad they're working in long-term care. Afterwards, tell them that they have just demonstrated a powerful leadership quality - to inspire and relate through story. Point to the Six Qualities of Culture Change Leadership posted on the wall. Tell them that their stories clearly say that it's worthwhile to do this work.

Details Objectives for this Session: Read objectives prepared and posted on flipchart (the 4 listed above or others as decided during planning).

Prepared Flipchart:

Concepts to Emphasize:

6 QUALITIES OF LEADERSHIP FOR CULTURE CHANGE:

- GROW AWARENESS IN SELF AND OTHERS
- INSPIRE AND MOTIVATE THROUGH STORY
- SHAPE A VISION TOGETHER
- INVOLVE ELDER, THEIR FAMILIES, STAFF
- BUILD A COMMUNITY; CREATE TEAM
- SHOW THE WAY BY WALKING THE TALK

Pocket of Module 1:

- Organizational Assessment Guide
- High Involvement Techniques
- Assessments:
 - Leadership Team self-assessment
- Team checklist - *Are We Ready?*
- Warmth Survey available at www.edenalt.ernative.com
- Other materials: Name tags, markers, mini-Hershey chocolate bars with each participant's name tucked in one.

10 minutes

30 minutes

Prepared Flipchart:

Objectives for Today:

1. integrate their personal visions with the organization's vision;
2. welcome the "big picture" responsibility of improving climate throughout the facility;
3. self-assess their strengths and the areas in need of development; and
4. describe the six qualities of exemplary leadership.

Read Objectives and point out Six Qualities of Leadership posted on the wall.

Leader opens the retreat by sharing personal goals and talks about the opportunities that Culture Change offers each of them in personal growth as well as the chance to make a serious difference in the lives of the Elders in our care.

Exercise # 1: Proud Moments

Read or Paraphrase:

We've already talked a little bit about our hearts -- and in this work the most powerful visions are those that integrate our hearts and our heads to create new ways for the residents and staff.

Can you all think of some of the best things we've done here in our organization - things you've felt proud of - things that we've done that show we're really doing the right things for our residents or staff. (Post these proud moments on flipchart.) If individuals are listing actions they individually took, acknowledge and post them, but gradually move the discussion to decisions/events/experiences/celebrations that this team or another team in the organization brought about.

End with statement about what we've accomplished by pulling together.

Exercise # 2: Visions for the Future

Ask participants to consider the facility. What is possible? How can we strengthen ourselves as a community? How do they envision the best possible world for our elders and for our staff? What is their personal vision for the facility? (Give them 5-7 minutes to jot their thoughts down, let them know that you will expect each and every one to share).

After they have finished, ask someone to share. Put their thoughts (as stated) up on the flipchart. This may fill 2 or 3 sheets. That's okay. Go around the circle and be sure everyone has the opportunity to share their thoughts.

Processing Exercise #2

When they have all shared, the Leader should share his/her vision, and then point out common threads from others'

Post items on flipchart called "Proud Moments"

Provide Handouts and ask everyone to work privately and quietly for 5 - 7 minutes. Leader should role-model by sitting down, thinking and making notes with the others.

Make notes on flipchart paper as they share.

10 minutes

15 minutes

PREPARED FLIPCHART

Reasons to be Proud of Our Organization

15 minutes

Handout:

What do I envision for this organization?

Picture the best possible world that we could create for our Elders.

What would it look like?

What can we do as the Leadership Team?

15 minutes

stated vision into his/her own description of what s/he hopes they are able to create together. S/he should help others see that their visions have many similar themes - no matter what department they come from - and that this has to do with **Leadership**. That their role as Leaders is to see the big picture (point to words on the flipchart that reflect big picture); and to accomplish a climate where people will want to live and work - a true community (point out any words that reflect this concept.)

The Leader should point out the possibilities in the personal visions, perhaps highlighting what everyone sees as common themes or achievable and desirable.

The Leader might also mention that the common vision can become stronger and more powerful as we all learn and grow in our abilities to use ourselves as leaders to bring about the best.

Exercise #3: Leadership Qualities

Pass out the self-assessment and then presents the short lecturette provided.

Read or Paraphrase:

We are passing out a self-assessment related to the 6 Qualities of Leadership for Culture Change. You are **not** going to be asked to hand these handouts in - they are for you to begin to think about yourself, and consider your strengths, and ways in which you would like to begin to grow.

We are going to take 15 minutes privately to work on this self-evaluation. Please write out your thoughts.

Processing Exercise #3:

Inform the group that you are going to go around the circle and ask each to share something from this exercise. They may decide to share a strength or one area in which they would like to grow as a leader; or they may share something they learned as we thought about these five qualities. The Leader should be the first to share in order to role-model the seriousness of this task. Open up for

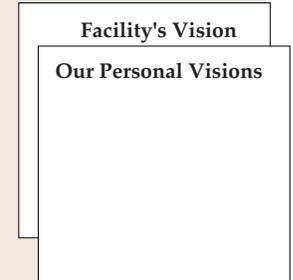
content

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If the organization has a published Vision that will remain in place, that should also be highlighted after people have shared. Look for similarities and common threads in all posted visions.

Flipchart:



15 minutes

Hand out the detailed Handout sheets on the Six Qualities of Leadership

Handout:

Am I ready to Lead the facility through culture change?
Comment on each of following.

	STRENGTHS	NEEDS
• BECOMING SELF-AWARE		
• INSPIRING THRU STORY		
• VISIONING TOGETHER		
• INVOLVING OTHERS		
• BUILDING TEAM		
• WALKING THE TALK		

30 minutes

discussion only after everyone has shared. (Accept whatever they choose to share).

Closing and Summary:

15 minutes

Read or paraphrase:

We've really begun to talk about our Visions for the organization; and about how we see ourselves as Leaders of change - we each bring some important strengths to the table; and each of us want to work on one or two major things to become a better leader. (Say something about the team that is reflective - *we've come through a lot together*, or *we're a new team with great potential to do wonderful work together*).

Now, it's time for us to work together differently - Not only do we continue to carry out our roles as managers of our different areas -- but we now must all take on the full cloak of Leadership - and that means each of us - Director of Dietary, Director of Housekeeping, Director of Nurses -- whoever we are - it means that we must begin to see our responsibilities to the whole house - As Director of Maintenance if I'm walking down the hall and hear two very unhappy CNAs I need to do something about it. Whether that be approaching them and saying "hey guys, what's the matter?" or another action you all consider appropriate. But we do something. Because each and every one of us has the responsibility to create the climate here - a human habitat - to make this a good place to live and work (*use the language that they shared in their personal visions*).

Suggest that before leaving, you together determine what the next steps should be?

Some options:

Review the Warmth Survey published by Eden Alternative on their website: www.culturechangenow.com.

Think about bringing one other person (not a department director) to the next meeting.

Consider offering this same experience in small groups to other staff.

Consider shaping a 45 minute all staff in-service around this topic.

This team attends the next session with the primary objective to discuss involving others in the culture change initiative.

Listen to comments to these options. Be open to hear other suggestions. Together determine the next step.

Final Activity: *We Respect and Value Each Other*

20 minutes

Read or paraphrase:

We want to close this retreat by asking you each to reach into the candy jar and pick one piece of candy. (Walk around the table having them choose a piece, sight unseen, like choosing a name for a prize). You'll notice that there's another team member's name written on the candy. We'd like you to take one final look at the six qualities of exemplary leadership, think about the person you've chosen. And we're going to go around the room one last time.

This time I would like for you to #1: share what you feel about the two hours we've spent together, and #2: offer positive feedback to the person you have on the candy. If you can, make the positive feedback fit one of the 6 qualities, but whatever you do, make it concrete and specific.

Leader says: I will begin. (Role-models by first expressing positive feelings about the retreat and then by sharing a positive, behavioral statement to the person chosen. Work so that feedback fits one of the 6 qualities: Self-Awareness, storytelling, visioning, involving others, building team and walking the talk.

Homework Assignment:

10 minutes

After all have shared, thank them for attending. Ask them to commit to at least one new personal action going forward. Examples are to

- Give positive feedback to one person outside of your department before the next meeting.
- Ask 4 people from other departments what their personal visions are. Ask them to take a few minutes and write their vision down for you and bring them with you to the next meeting. Be sure to include at least 2 front-line staff.

Adjourn