Medical Center Leader Expectations
2017 UVA Health System Engagement Survey Results
Table of Contents

The 2017 UVA Health System Engagement Survey provides insight and awareness gained through team member feedback, which is used to build a “best place to work” culture at the Medical Center. This culture of engagement, accountability, and trust through partnership with team members drives high organizational performance and growth by delivering excellent quality of care and service to patients.

All leaders play a key role in this process. This guide was designed to provide clear expectations regarding your role in sharing results, gathering feedback, and action planning with your work units.

Key Terms .......................................................................................................................... 3
Tiered Approach to Action Planning .................................................................................. 4
Expectations by Role ........................................................................................................... 5-7
  Service Line Leaders ....................................................................................................... 5
  Leaders / Managers ......................................................................................................... 6
  Learning & Organizational Development Support ......................................................... 7
Timeline .............................................................................................................................. 8
Sharing Results with Your Team ....................................................................................... 9
Action Planning Template ................................................................................................. 10
Additional Resources ......................................................................................................... 11
Key Terms

Tiers
Reflects team members’ average responses to survey items that most powerfully impact commitment. *(Also know as a work unit’s Power Items Score)*

**Tier I Teams:**
Above Average Performance
Score of 5.0 – 4.15

**Tier II Teams:**
Average Performance
Score of 4.14 – 3.80

**Tier III Teams:**
Below Average Performance
Score of 3.79 or below

**Action Planning Readiness Score (APR):**
This score represents team members’ readiness to engage in feedback and action planning. The score is assigned through calculations on a 100-point scale from survey items specific to manager performance:

- High readiness 90-100
- Moderately high readiness 80-89
- Moderate readiness 70-79
- Moderately low readiness 60-69
- Low readiness 0-59

**Work Unit (WU):**
Team within UVA Medical Center that is specially staffed and equipped to provide a particular type of care or service

**Service Line Leaders:**
References all patient population, operational and corporate service line leaders

**Work Unit (WU) Leaders:**
Manager/Leader of team within UVA Medical Center that is specially staffed and equipped to provide a particular type of care or service
Tiered Approach to Action Planning

• The Medical Center Cabinet will give focus to organizational level planning on key drivers and themes
• Action planning should follow Be Safe methodology and determine the root cause of the opportunity identified in your work unit’s Engagement Survey results
• All work unit (WU) leaders are required to share results with their teams between September 11 and October 6, 2017
  • Please do not share your results with your teams until September 11, 2017
  • Leaders should have a discussion with their next level WU leaders before sharing results with team members

Tier I Work Units

• Action planning not required
• Celebrate engagement level and work to maintain or exceed
• WU leaders of these work units are encouraged to support their Tier II and III colleagues within their service lines

Tier II Work Units

• Highly recommend action planning one item
• Tier II work units with an Action Plan Readiness Score (APR) of 69 or less are required to complete an Action Plan at the manager level

Tier III Work Units

• Required to action plan on at least one item
• Tier III work units with an Action Plan Readiness Score (APR) of 69 or less are required to complete an Action Plan at the work unit level and another Action Plan at the work unit leader level (a plan to help the work unit leader improve her/his relationship with that unit)
  • Service line leader will operate as sponsor, working with unit leadership to develop a Manager Level Action Plan with the appropriate WU leader
  • Service line leader will provide support and direction for the development and completion of a Work Unit Level Action Plan
• Action Plan progress should be reported to your service line leader at three and six months
• All Action Plans must be completed by November 10th
Expectations by Role

Service Line Leaders (Action Plan Sponsors at Unit Level)

- Tier I and II work units with high to moderate APR scores
  - Encourage WU leaders to “take time to review and share results”
  - Establish check-in frequency and ask that WU leaders provide updates
  - “Call me if you need any support”

- Tier III work units with high to moderate APR scores
  - Encourage WU leaders to “take time to review results”
  - “Go share with your work units”
  - Encourage next-level WU leader to schedule a formal 1:1 debrief with manager to review plan of action
  - Establish check-in frequency and ask that WU leaders provide updates on Action Plans

- Tier II work units with low to moderately low APR scores
  - Encourage WU leaders to “take time to review results”
  - Before Engagement Survey data is shared with work units, ask next-level WU leader to schedule a formal 1:1 to discuss how manager will approach sharing this data with his/her teams
  - After sharing results, determine next steps for action planning
  - Establish check-in frequency and have WU leaders provide updates on Action Plans

- Tier III work units with low to moderately low APR scores
  - Encourage WU leaders to “take time to review results”
  - Consult with L&OD to determine involvement and support with sharing results and action planning with work units
  - Before Engagement Survey data is shared with work units, ask next-level WU leader to schedule a formal 1:1 to discuss how manager will approach sharing this data with his/her teams
  - After sharing results, determine next steps for action planning - service line leader to attend action planning session as sponsor
  - Establish check-in frequency and ask WU leaders to provide updates on Action Plans
    - Recommendation: Establish group setting for updates of Tier III plans in effort to “spread solutions”. All impacted work units sharing and hearing together can be helpful

* Expected activity at the service line leader level will include providing direct support to their Tier III, encouragement to their Tier II, and recognition to their Tier I work units.

* Encourage all leaders to utilize L&OD materials to understand and share results and create Action Plans. Materials can be found on the HR website.
Expectations by Role

Work Unit Leaders (Action Plan Owners at Unit Level)

- Tier I and II work units with high to moderate APR scores
  - Take time to review results
  - Review and follow the “Guide to Understanding and Sharing Your Survey Results” on the HR website
  - Establish check-in frequency with your next-level WU leader and provide updates on your Action Plan, if one is created

- Tier III work units with high to moderate APR scores
  - Take time to review results
  - Review and follow the “Guide to Understanding and Sharing Your Survey Results” on the HR website
  - Schedule a formal 1:1 with your next-level WU leader to discuss your results and how best to share with your work units
  - Hold Action Planning Session with work unit
  - Follow-up with next-level WU leader to review Action Plan and determine next steps
  - Establish check-in frequency with your next-level WU leader and provide regular updates on Action Plans
  - All Action Plans must be completed by November 10th

- Tier II work units with low to moderately low APR scores
  - Take time to review results
  - Review and follow the “Guide to Understanding and Sharing Your Survey Results” on the HR website
  - Schedule a formal 1:1 with your next-level WU leader to discuss your results and how best to share with your work units
  - Establish check-in frequency with your next-level WU leader and provide regular updates on Action Plans, if one is created

- Tier III work units with low to moderately low APR scores
  - Take time to review results
  - Meet with your next-level WU leader to plan how to share results with work unit (Consider L&OD support before sharing and action planning)
  - As needed, partner with L&OD to utilize the “Guide to Understanding and Sharing Your Survey Results” on the HR website
  - After sharing results, determine next steps for action planning - service line leader to attend action planning session as sponsor
  - Follow-up with next-level WU leader to review Action Plan and determine next steps
  - Establish check-in frequency with your next-level WU leader and provide regular updates on Action Plans
  - All Action Plans must be completed by November 10th
Expectations by Role

Learning & Organizational Development Support

• Create and distribute action planning support materials for all work units who are required or would like to action plan

• Generate communication regarding the importance and advantages of action planning

• Align with and support service line leader based on Engagement Survey results
  • Tier III work units, low Action Planning Readiness (APR) scores, Low Patient Satisfaction scores
  • Remain aligned with service line leaders to consult on survey results, provide strategic support at the work unit level, and establish joint expectations
## Timeline

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 9th</td>
<td>Survey results presentation to Medical Center Management Group</td>
</tr>
<tr>
<td>August 9th – September 8th</td>
<td>Work unit leader reviews results in Press Ganey Portal and meets with next-level work unit leader to prepare team discussion</td>
</tr>
<tr>
<td>September 11th – October 6th</td>
<td>Work unit leader discusses survey results with team</td>
</tr>
<tr>
<td>October 9th – November 10th</td>
<td>Action Plans developed</td>
</tr>
<tr>
<td>By November 10th</td>
<td>Action Plans submitted</td>
</tr>
</tbody>
</table>
Sharing Results with Your Team

To better understand your work unit’s results, please reference the Guide to Understanding and Sharing Your Survey Results.

Once you are ready to share your survey results with your work units, please utilize the Work Unit Results Review PowerPoint Template, which is available for download on the HR website.

Please note that this template is customizable and includes speaking points* to help guide you through the Results Review Session with your work units. All items in red should be replaced with your work unit’s individual results.

*To view the speaking points, please complete the following steps:
  • Open the PowerPoint template document
  • Click on the “View” tab at the top of the page
  • Locate “Presentation Views” at the top and select “Notes Page”
Utilize the Action Planning Template below to take notes during your work unit discussions. This template is an additional tool to simplify the action planning process.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Title</td>
</tr>
<tr>
<td>2.</td>
<td>Survey Items</td>
</tr>
<tr>
<td>3.</td>
<td>Due Date</td>
</tr>
<tr>
<td>4.</td>
<td>Owners</td>
</tr>
<tr>
<td>5.</td>
<td>Org Hierarchy Units</td>
</tr>
<tr>
<td>6.</td>
<td>Issue</td>
</tr>
<tr>
<td>7.</td>
<td>Goal</td>
</tr>
<tr>
<td>8.</td>
<td>Success Measure</td>
</tr>
<tr>
<td>9.</td>
<td>Task #1</td>
</tr>
<tr>
<td></td>
<td>+ Owner</td>
</tr>
<tr>
<td></td>
<td>+ Start Date</td>
</tr>
<tr>
<td></td>
<td>+ Due Date</td>
</tr>
<tr>
<td>Task #2</td>
<td>+ Owner</td>
</tr>
<tr>
<td></td>
<td>+ Start Date</td>
</tr>
<tr>
<td></td>
<td>+ Due Date</td>
</tr>
<tr>
<td>Task #3</td>
<td>+ Owner</td>
</tr>
<tr>
<td></td>
<td>+ Start Date</td>
</tr>
<tr>
<td></td>
<td>+ Due Date</td>
</tr>
<tr>
<td>10.</td>
<td>Comments</td>
</tr>
</tbody>
</table>
Additional Resources

Once you are logged into the Press Ganey Portal, please complete the following steps to access additional resources including educational videos, action planning tips, and more.

- On the left side of the portal’s homepage, there are various options available for viewing results, understanding results, and beginning action planning:
  - **Summary** (Shows a summary of your team’s results)
  - **Strengths** (Shows up to ten itemized strengths from highest to lowest score)
  - **Concerns** (Shows up to ten itemized concerns from lowest to highest score)
  - **Item Details** (Shows all survey items with additional details)
  - **Org Details** (Shows a summary of organizational survey data)
  - **Action Planning** (Shows the action planning template)
  - **Action Planning Tracker** (Tracks the progress of your action plans)
  - **Response Rates** (Shows the response rate for your team)
  - **Documents**
  - **Snapshot Export** (Allows managers to print or email a screen view)

- On the top right side of the portal’s homepage, you will find additional resources by clicking on the “Resources” tab
  - **Resources** (Provides a series of resource videos that will assist in understanding your team’s data, the engagement portal, and the action planning process)