Advanced Leadership for Quality Workshop
Tentative Schedule

Day 3
Thursday, August 11, 2011

Time	Objective	Presenter
8:00 – 8:30	Debrief / Review	Karren Kowalski
8:30 – 9:20	Team STEPPS Module 6: Communication (cont'd)	Karren Kowalski
9:20 – 10:20	Change for Quality Outcomes	Diane Pisanos
10:20 – 10:50	Resilience	Deb Center
10:50 – 11:00	Break	
11:00 – 12:00	Revisiting Coaching in the Moment	Diane Pisanos & Deb Center
12:00 – 12:30	Lunch	
12:30 – 1:30	Revisiting Coaching in the Moment (cont'd)	Diane Pisanos & Deb Center
1:30 – 2:15	Walk the Talk	Karren Kowalski
2:15 – 2:30	Break	
2:30 – 4:00	Full Exploration of Capstone Report on Team STEPPS took selected	Karren Kowalski & Marianne Horner
4:00 – 5:00	Wrap Up	Karren Kowalski

Change for Quality Outcomes
Effective Change for Transforming Cultures
Diane Pisanos *Integral Healthcare Consulting*

1. Introduction:
   - Metaviews: paradox, types of change

2. Switch:
   - Connection with Emotional Intelligence & Change: Personal

3. Adaptive Change in Organizations
   - Heifetz & Laurie

4. Evidence of Commitment
   - Leading at the Edge of Chaos

5. Change & Engagement
   - The Power of Full Engagement

6. Dealing with Resistance
   - The Flawless Consulting Field book and Companion

7. The 7 Principles of Cultural Change
   - The Heart of Coaching: Using Transformational Coaching To Create a High-Performance Culture
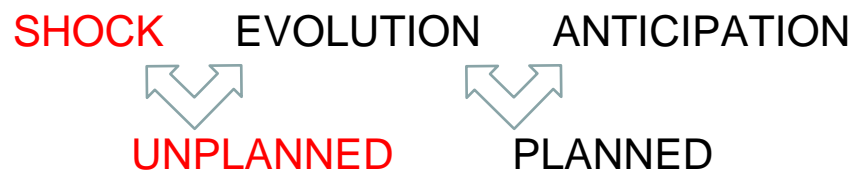
PARADOXICAL STATES OF
THE HUMAN BEING

- Joy & Grief
- Pleasure & pain
- Peace & war
- Success & embarrassment
- Victory & defeat
- Praise & blame
- Gain & loss

There is order to the
Universe
In the midst of death, life
continues
In the midst of untruth, truth
continues
In the midst of injustice,
justice continues
And in all darkness, there is
light.

Mahatma Gandhi

Individual------Team/department------System/organization CHANGE

CHANGE

SHOCK   EVOLUTION   ANTICIPATION

UNPLANNED   PLANNED

"On the balcony perspective"

SWITCH
How to Make Change When Change is Hard
Chip & Dan Heath

1. Direct the Rider **2. Motivate the elephant** **3. Shape the path**	
Direct the Rider *"the rational rider side"* • **Follow the Bright Spots** • **Script the Critical Moves** • **Point to the Destination**	*Thinking differently can help change behavior and lead to better results*
Motivate the Elephant *"the emotional elephant side"* • **Find the feeling** • **Shrink the Change** • **Grow Your People**	*Feeling Differently can change behavior MORE and lead to even better results.*
Shape the Path • **Tweak the Environment** • **Build Habits** • **Rally the Herd**	

Adaptive Change in Organizations Heifetz & Laurie

Adaptive change is distressing for people to go through it: people are invited to take on:

- New roles
- New relationships
- New values
- New behaviors

- New approaches/practices to work, develop new competencies
- New conversations/new language
- Learn different ways of doing business
- Begin to work collectively

The toughest task for leaders in effecting change is mobilizing people throughout the organization (Engaging others)

The **6** Principles for Leading Adaptive Work + **1**

1. Getting on the balcony *Expanded perspective facilitates mobilization of people to do adaptive work*	♦ Be an observer as well as a participant to really see what is going on ♦ Be able to review patterns ♦ See a context for change or create one ♦ Identify struggles over values & power ♦ Recognize patterns of work avoidance ♦ Watch for functional & dysfunctional reactions to change
2. Identifying the adaptive change *Value diversity because innovation & learning are products of differences*	♦ Behaviors shows up in values, practices & relationships ♦ Major learning's are: learning to collaborate, creating trust, learn different ways of doing business, develop new competencies, and begin to work collectively ♦ Gathering insights from people: 1. Listen to ideas & concerns of people inside & outside 2. Develop powerful questions: Whose values, beliefs, attitudes or behaviors would have to change in order for progress to take place? What shifts in priorities, resources, & power are necessary? What sacrifices would have to be made & by whom? 3. Conflicts are symptoms of adaptive challenges 4. Disputes over technical issues are often values & norms issues ♦ Leadership self-reflection for their own adaptive challenges
3. Regulating distress & minimizing external threats *People can only learn so much so fast*	♦ Anticipate the emotional response to change: immobilization, denial, anger, bargaining, depression, testing, acceptance ♦ We must allow people to be uncomfortable while they learn new ways to manage themselves ♦ Help maintain a productive level of tension 1. A holding environment-to encourage the new work/behavior, "fireside chat's" 2. Build an incredible executive team 3. Build sequence & pace into the work 4. Leadership responsibilities: direction, protection, orientation, managing conflict, shaping norms 5. Leadership emotional intelligence: presence, poise, tolerance of uncertainty, frustration & pain

4. Maintaining disciplined attention	♦ Listen & learn from each other on the executive team: learn the way to collective ♦ solutions ♦ Stay on top of "work avoidance"(distractions)-scape-goating, denial, focusing only on technical issues, attaching individuals > perspectives ♦ "Court the uncommitted"
5. Giving work back to the people	♦ Trust others & decentralize authority ♦ Let people bear the weight of responsibility: let them discover the problem ♦ Transform how conflict is perceived so it can become an engine of progress
6. Protecting voices of leadership from below	♦ Be curious of what people are really saying ♦ Ask what are we missing?

Change is emotional and feelings often trump thinking!

Self-care for leaders **(The dangers within)**	Self-awareness ♦ Check in with yourself-monitor your stress threshold ♦ Stay aware of the distinctions of your personal self(your anchor) and your professional role ♦ Self-management ♦ Get your needs met ♦ Transform desires for control & self-importance ♦ Seek inspiration & renewal regularly ♦ Develop resilience ♦ Strive for alignment of your inner & out world

Powerful reflection:
♦ What behavior patterns are you willing to change?
♦ Identify your adaptive challenge: is it about self management or relational management?

Evidence of Commitment

1. Investing in resources to ensure the desired outcome
2. Pursuing the goal consistently, even under stress & with the passage of time
3. Rejecting ideas or action plans that offer short term benefits but are inconsistent with overall strategy for ultimate goal achievement
4. Standing fast in the face of adversity, remaining determined & persistent in their quest for the desired goal
5. Applying creativity, ingenuity, & resourcefulness to resolving problems or issues that would otherwise block their goal

Change & Engagement

Principles of Engagement for Success

What does engagement look like? How do you know when others are engaged? How do you know when you are engaged? What is the opposite of engagement?

The Dynamics of Energy

High Negative	High Positive
Angry	Invigorated
Anxious	Confident
Defensive	Challenged
Fearful	Joyful
Resentful	Connected
Low Negative	**Low Positive**
Depressed	Relaxed
Exhausted	Mellow
Burned out	Peaceful
Hopeless	Tranquil
Defeated	Serene

Sustained High Performance in the Storm

Fully Engaged

Physically energized	Mentally focused
Emotionally connected	Spiritually aligned

Energy Management

Managing capacity: The quantity, quality, focus, and force of energy that is available to perform in the storm.

Primary Capacities/Skills (Big Muscles)

Physical	Emotional	Mental	Spiritual
Heart & lungs	Self-confidence	Focus	Character
Abdominals	Self-regulation	Realistic Optimism	Passion/commitment
Shoulders & Back	Interpersonal	Time management	Integrity
Legs	effectiveness	Creativity	Service to others
Arms	Empathy/caring		

Supportive Habits/skills (Small Muscles)

Physical	Emotional	Mental	Spiritual
Sleep	Patience	Visualization	Honesty
Exercise	Openness	Positive self-talk	Integrity
Diet	Trust	Positive attitude	Courage
Hydration	Enjoyment	Mental preparation	Persistence

The Power of Full Engagement

Strategies for Engagement

Goal: to evoke with our staff the capacity to deal with each other in a courageous & more direct way. (To improve our relational management within Emotional Intelligence)

Engagement is about inclusion. ♦ Engagement is about choices.

1. One way to think about change is that the way to change a culture is to change the **conversation!**
    ♦ We can be a catalyst for a new conversation.
    ♦ Conversation is a way we define reality & define who we are.
    ♦ Through our conversations we invite, demand, or manipulate others to join us in creating a future.

2. Engaging change: through the **first person view** (street view) vs. the third person perspective (top down).
    ♦ What does it mean to choose engagement over an "instrumental view" of people and change?
    ♦ To choose engagement creates a very different reality.

3. Change and three **primary stances** in life:
    ♦ Life as a Disappointment
    ♦ Life as Indulgence
    ♦ Life as Creating→ the only one that fosters engagement*

Dealing with Resistance

Resistance can be the indirect expression of real concerns.

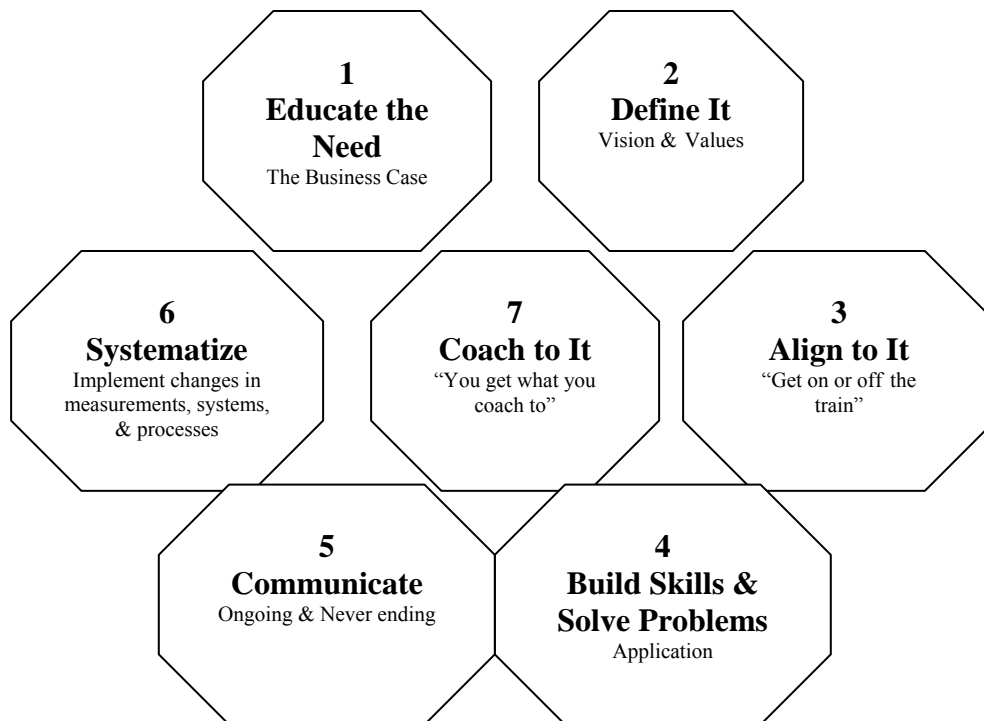**R**esistance is how we protect ourselves from difficult issues.

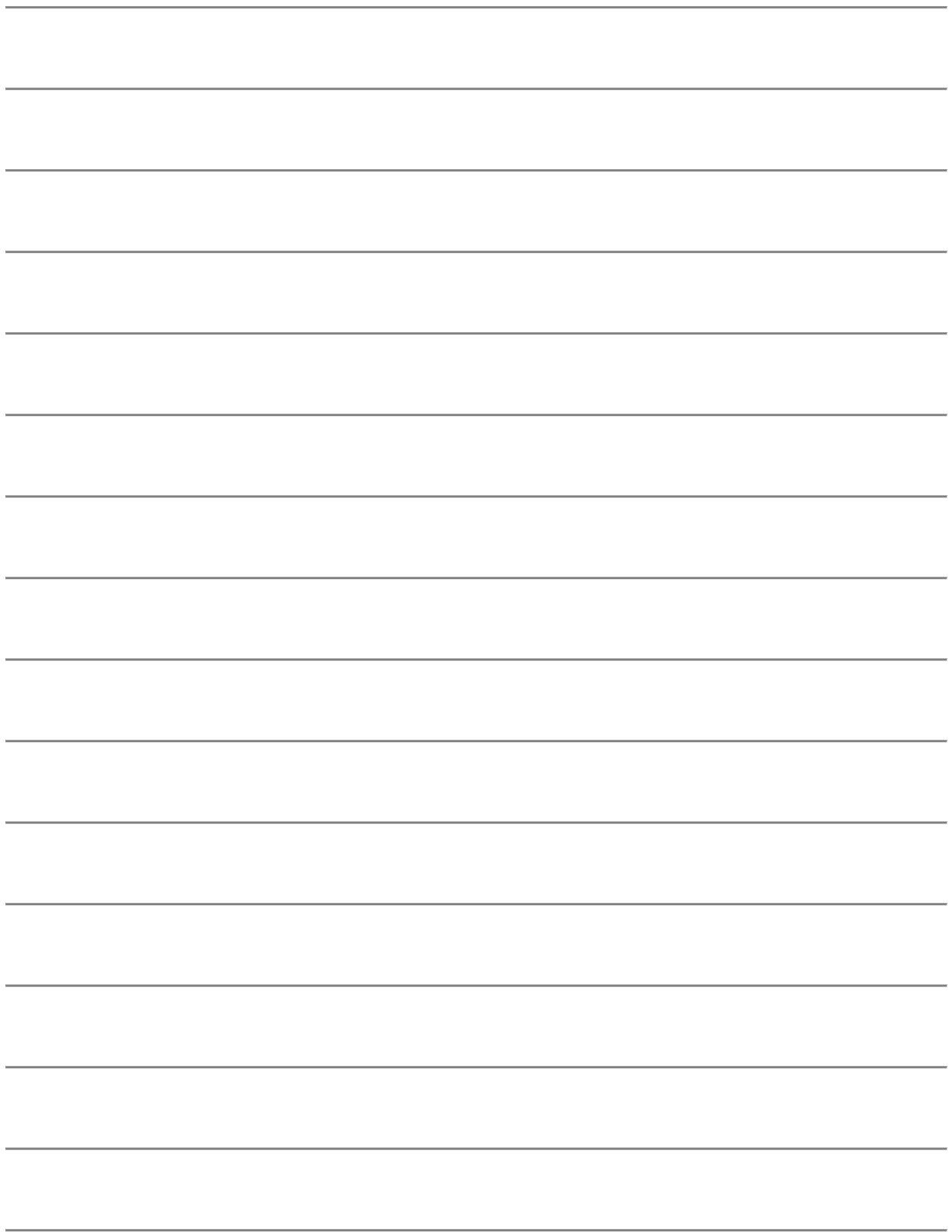|	Clarify	Energize the atmosphere	Four guidelines for exposing content & emotion
Reflect Recognize Reframe Embrace Reveal Renew	♦ Identify feelings & issues that are motivating the resistance ♦ Name the behavior when inappropriate ♦ Name the resistant behavior ♦ Be curious about what is driving the resistant behavior	♦ Revisit the plan ♦ Celebrate something ♦ Take their pulse ♦ Play to their strengths ♦ Look at your own behavior	♦ Realize that this difficult conversation is the right conversation—the one to have ♦ Let go of my need to defend myself ♦ Remind my self I am there to engage the client (employee) & maintain good will ♦ Care enough to hear what the client(employee) has to say

The Flawless Consulting Fieldbook and Companion:

The **7** Principles of Cultural Change

There are seven distinct, interdependent, synergistic, and compulsory principles that make cultural change possible.

The Heart of Coaching: Using Transformational Coaching To Create a High-Performance Culture: Thomas Crane

1
Educate the Need
The Business Case

2
Define It
Vision & Values

6
Systematize
Implement changes in measurements, systems, & processes

7
Coach to It
"You get what you coach to"

3
Align to It
"Get on or off the train"

5
Communicate
Ongoing & Never ending

4
Build Skills & Solve Problems
Application

The goal is to increase one's capacity to assimilate change with minimal dysfunctional behavior.

Notes:

Resiliency - Self & Team Assessment
Homework – DUE _____

Homework and Class Preparation: Please read and respond to the questions to prepare for a dialogue in class.

Creating and maintaining a culture of quality and safety *requires* organizations, frontline leaders and members of the team have resiliency in order to quickly adapt to change.

- Those individuals and organizations with **low resiliency** often resist change because change is seen as a threat. Quality and safety outcomes in organizations with low resiliency are poor.
- Those individuals and organizations with **high resiliency** are nimble and adapt quickly. They view change as essential and as an opportunity to improve. Quality and safety outcomes in organizations with high resiliency are excellent.
- As leaders, having an understanding of change and how you and your team members perceive change will be key to implementing successful and necessary change within your organization.
- By developing resiliency you and your team will not only survive change, you have a tremendous opportunity to **learn, grow, and thrive!**

What is Resiliency? According to Conner (2006) "*Resilience is one component of Emotional Intelligence defined as the ability to return to the original state or form after being stretched, compressed or bent. It is the ability to recover from adversity. Needless to say, developing resilience is a highly desirable quality in today's ever-changing world.*"

Goal of Resiliency: is to increase one's (*as in the individual, team or as an organization*) capacity to assimilate change with minimal dysfunctional behavior.

Resilient Teams - *"Show strikingly little blame, personal attack, or scapegoating. Members take responsibility for their own feelings and actions and acknowledge their contribution to difficulties."*
Nimble Organizations *are full of agile people; perform with ambiguity; use creative tension to their advantage; have self-organizing units; and function at a conscious competence level.*

Assessment of Resiliency: This assessment is intended to help prepare you for our discussion and to assess the baseline level of resiliency. As a front-line leader, having this awareness of yourself and your team *before* you embark with a change project related to quality and safety will allow you to identify strategies to improve your outcomes. *(This tool may be used with your team, to allow each person the opportunity to self-evaluate their individual and team perception of resiliency.)*

Before you begin, reflect **on the last change** implemented in your organization or on your unit. Reflect on your response and the response of the team to the change. After reading the background information provided in each section, rate each characteristic related to "*how you see yourself and the team the majority of the time*" by making a mark on the continuum.

Identify and Name your Last Change: _____

How long ago was the change? _____

Which of the four roles below, best describes your role in the change process?
_____ Decision-maker and Formal Leader
_____ Informal Leader (Input into the decision or champion within the team)
_____ Member of the Team (No specific role in the decision and responsible for implementation of the change)
_____ Outsider (no role or responsibility for the change)

POSITIVE: Resilient people are optimists. They display a self-assurance that is based on their view that life is complex and filled with many opportunities. Optimists believe that defeat is temporary and its causes are not solely their fault, rather due to unfortunate circumstances. Conversely, the pessimist believes defeat will last a long time and assigning blame to someone, including him or herself, is necessary. For this characteristic there are two types, danger and opportunity. You may see yourself and the team in the different types dependent on the circumstances in a given situation.

For this assessment, consider where you fall on the continuum the majority of the time:

DANGER Type (D-Type)	OPPORTUNITY Type (O-Type)
☐ I interpret the world as binary and sequential	☐ I interpret the world as multifaceted and overlapping
☐ I expect the future to be orderly and predictable	☐ I expect the future to be filled with constantly shifting variables
☐ I interpret unmet expectations as personal vendettas or conspiracies	☐ I view disruption as the natural result of the changing world
☐ I spend time resolving many contradictions	☐ I spend time understanding many paradoxes
☐ I see major change as uncomfortable and a problem to avoid	☐ I see major change as presenting opportunities
☐ I feel most challenges are unfair & serve no purpose	☐ I believe there are usually lessons to be learned from challenges
☐ I see life as generally punishing	☐ I see life as generally rewarding

RATE YOUR RESILIENCE CONTINUUM FOR <u>POSITIVE</u> CHARACTERISTIC:

Danger _____ Opportunity

"Middle of the Road"

The culture of a team can be optimistic or pessimistic. For this assessment, consider where your **<u>TEAM</u>** fall on the continuum the majority of the time:

DANGER Type (D-Type)	OPPORTUNITY Type (O-Type)
☐ My team interprets the world as binary and sequential	☐ My team interprets the world as multifaceted and overlapping
☐ My team expects future to be orderly and predictable	☐ My team expects future to be filled with constantly shifting variables
☐ My team interprets unmet expectations as personal vendettas or conspiracies	☐ My team views disruption as the natural result of the changing world
☐ My team spends time resolving many contradictions	☐ My team spends time understanding many paradoxes
☐ My team sees major change as uncomfortable and a problem to avoid	☐ My team sees major change as often presenting opportunities
☐ My team feels most challenges are unfair & serve no purpose	☐ My team believes there are usually lessons to be learned from challenges
☐ My team sees life as generally punishing	☐ My team sees life as generally rewarding

RATE YOUR <u>TEAMS</u> RESILIENCE CONTINUUM FOR <u>POSITIVE</u> CHARACTERISTIC:

Danger _____ Opportunity

"Middle of the Road"

FOCUSED: The focused characteristic of resilient people has to do with having a clear vision of what they want to achieve. Focused people take time to write down their goals, objectives, obstacles and the strategies they will employ to find solutions for problems facing them.

☐ I lack an overarching purpose or vision and/or the ability to stay focused on its achievement.	☐ I maintains a strong purpose or vision that serves both as a source of meaning and as a guidance system to reestablish perspectives following significant disruption.
☐ My team lacks an overarching purpose or vision and/or the ability to stay focused on its achievement.	☐ My team maintains a strong purpose or vision that serves both as a source of meaning and as a guidance system to reestablish perspectives following significant disruption.

RATE <u>YOUR</u> RESILIENCE CONTINUUM FOR <u>FOCUS</u> CHARACTERISTIC:

Low Focus _____ High Focus
"Middle of the Road"

RATE YOUR <u>TEAMS</u> RESILIENCE CONTINUUM FOR <u>FOCUS</u> CHARACTERISTIC:

Low Focus _____ High Focus
"Middle of the Road"

FLEXIBLE: Flexible people are those who demonstrate a special pliability or adaptability when responding to uncertainty. This resilient characteristic requires that you identify and compartmentalize your fears when facing new and intimidating situations.

☐ I approach change as a mysterious event. ☐ I have a low tolerance for ambiguity as evidenced by poor performance in unstructured or uncertain work environments. ☐ I need a long recovery time after adversity or disappointment. ☐ I feel victimized during change. I engage in changes that are beyond personal or organizational capabilities. ☐ I fail to break from established ways of seeing things. ☐ I do not develop and maintain nurturing relationships that can be used for support. I prefer to do the work alone. ☐ I lack patience, understanding and humor in the face of change.	☐ I believe change is a manageable process. ☐ I have a high tolerance for ambiguity. ☐ I need only a short time to recover after adversity or disappointment. ☐ I feel empowered during change. ☐ I recognize my own strengths and weaknesses and I know when to accept internal or external limits. Challenges and when necessary, modifies my own assumptions or frame of reference. ☐ I rely on nurturing relationships for support. I display patience, understanding, and humor when dealing with change.
☐ My team approaches change as a mysterious event. ☐ My team has a low tolerance for ambiguity as evidenced by poor performance in unstructured or uncertain work environments. ☐ My team needs a long recovery time after adversity or disappointment. ☐ My team feels victimized during change. Engages in changes that are beyond personal or organizational capabilities. ☐ My team fails to break from established ways of seeing things. ☐ My team does not develop and maintain nurturing relationships that can be used for support. Individuals prefer to work alone and in silos. ☐ My team lacks patience, understanding and humor in the face of change.	☐ My team believes change is a manageable process. ☐ My team has a high tolerance for ambiguity. ☐ My team needs only a short time to recover after adversity or disappointment. ☐ My team feels empowered during change. ☐ My team recognizes their individual strengths and weaknesses and knows when to accept internal or external limits. Members challenge each other to grow and when necessary, modifies their individual assumptions or frame of reference. ☐ My team relies on nurturing relationships for support. Members display patience, understanding, and humor when dealing with change.

Adapted from <u>Managing at the Speed of Change</u> by Daryl Connor
~ Originally created by Diane Pisanos~ Adapted for Teams striving to improve quality and safety by Deborah Center~

RATE <u>YOUR</u> RESILIENCE CONTINUUM FOR <u>FLEXIBLE</u> CHARACTERISTIC:

Low Flexibility _____ High Flexibility

"Middle of the Road"

RATE YOUR <u>TEAMS</u> RESILIENCE CONTINUUM FOR <u>FLEXIBLE</u> CHARACTERISTIC:

Low Flexibility _____ High Flexibility

"Middle of the Road"

ORGANIZED: Organized people have the knack for developing structured approaches to managing ambiguity. They creatively plan, carefully set priorities, and engage in deliberate action steps in order to accomplish tasks.

☐ I become lost when faced with confusing information. ☐ I engage in too many diverse change projects that collectively drain assimilation resources. ☐ I cannot establish and/or update priorities during change. ☐ I fail to effectively manage multiple tasks and demands that occur at the same time. ☐ I cannot compartmentalize tasks and pressures, so one stress point spills over into other areas. ☐ I am prone to knee-jerk reactions.	☐ I identify the underlying themes embedded in confusing situations. ☐ I consolidate what appears to be several unrelated change projects into a single effort with a central theme. ☐ I see and renegotiate priorities during change. ☐ I manage many simultaneous tasks and demands successfully. ☐ I am skilled at compartmentalizing so that stress in one area does not carry over to other projects or parts of the work environment. ☐ I recognize when to ask others for help ☐ I engage in action only after careful planning.
☐ My team becomes lost when faced with confusing information. ☐ My team engages in too many diverse change projects that collectively drain assimilation resources. ☐ My team cannot establish and/or update priorities during change. ☐ My team fails to effectively manage multiple tasks and demands that occur at the same time. ☐ My team cannot compartmentalize tasks and pressures, so one stress point spills over into other areas. ☐ My team is prone to knee-jerk reactions.	☐ My team identifies the underlying themes embedded in confusing situations. ☐ My team consolidates what appears to be several unrelated change projects into a single effort with a central theme. ☐ My team sets and renegotiates priorities during change. ☐ My team manages many simultaneous tasks and demands successfully. ☐ My team is skilled at compartmentalizing so that stress in one area does not carry over to other projects or parts of one's life. ☐ My team recognizes when to ask others for help ☐ My team engages in action only after careful planning.

RATE <u>YOUR</u> RESILIENCE CONTINUUM FOR <u>ORGANIZED</u> CHARACTERISTIC:

Low Organization _____ High Organization

"Middle of the Road"

RATE YOUR <u>TEAMS</u> RESILIENCE CONTINUUM FOR <u>ORGANIZED</u> CHARACTERISTIC:

Low Organization _____ High Organization

"Middle of the Road"

Adapted from <u>Managing at the Speed of Change</u> by Daryl Connor
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PROACTIVE: The proactive characteristic of resilient people means that they *engage* change rather than simply defend against it. They take the offense rather than the defense. They take calculated risks and then apply lessons learned from past experiences to similar challenges facing them.

☐ I am unable to recognize impending or potential change situations.	☐ I determine when a change is inevitable, necessary, or advantageous.
☐ I rigidly adhere to old operating style when facing the unexpected.	☐ I reframe changing new situations, improvise new approaches, and maneuver to gain an advantage.
☐ I do not take risks when consequences are difficult to determine or are clearly negative.	☐ I take risks in spite of potentially negative consequences.
☐ I can repeat the same kind of change without significant learning taking place.	☐ I draw important lessons from change-related experiences that are then applied to similar situations.
☐ I react to disruptions by blaming, attacking, judging, withholding and CYA activity.	☐ I respond to disruption by investing energy in problem solving and teamwork.
☐ I am unable to influence others or resolve conflicts effectively.	☐ I am able to influence others and resolve conflicts effectively.
☐ My team is unable to recognize impending or potential change situations.	☐ My team determines when a change is inevitable, necessary, or advantageous.
☐ My team rigidly adheres to old operating style when facing the unexpected.	☐ My team reframes changing new situations, improvises new approaches, and maneuvers to gain an advantage.
☐ My team does not take risks when consequences are difficult to determine or are clearly negative.	☐ My team takes risks in spite of potentially negative consequences.
☐ My team can repeat the same kind of change without significant learning taking place.	☐ My team draws important lessons from change-related experiences that are then applied to similar situations.
☐ My team reacts to disruptions by blaming, attacking, judging, withholding, and CYA activity.	☐ My team responds to disruption by investing energy in problem solving and teamwork.
☐ My team is unable to influence others or resolve conflicts effectively.	☐ My team is able to influence others and resolve conflicts effectively.

RATE YOUR RESILIENCE CONTINUUM FOR PROACTIVE CHARACTERISTIC:

Low _____ High

"Middle of the Road"

RATE YOUR TEAM RESILIENCE CONTINUUM FOR PROACTIVE CHARACTERISTIC:

Low _____ High

"Middle of the Road"

My overall assessment of my resiliency today: RESILIENCE CONTINUUM

Low _____ High

"Middle of the Road"

My overall assessment of my TEAM's resiliency today: RESILIENCE CONTINUUM

Low _____ High

"Middle of the Road"

Resiliency: Going with the flow to learn from, grow and thrive during change!
Quality and Safety Initiative – August, 2011

By: Deborah Center MSN, RN, CNS
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Rate the following by placing a check mark next to the statement each category that *most reflects* your resiliency:

Personal Resiliency Skill	<u>Resiliency Strength</u>: *Indicates this is a skill you can rely on in times of change.*	<u>Resiliency Development Need</u>: *Indicates you have room to improve your skills to increase your resiliency.*	Comments: *How can you improve these skills?*
Acceptance of Change	☐ I am comfortable with change. I see it as an opportunity to grow as a leader.	☐ Change makes me uneasy. I don't like facing new challenges without having some kind of control over the situation.	
Continuous Learning	☐ Change provides a chance for me to learn new skills and test new ideas. I like to build on the lessons of the past – my successes and my disappointments.	☐ I want to stick to what I know best and with the skills that got me to this point in my career. Other people expect that – it is a part of who I am.	
Self-Empowerment	☐ I regularly assess my strengths. I keep my eye out for work assignments that will let me build my leadership skills.	☐ I have enough on my hands guiding the work of my direct reports. If this organization wants me to develop, it has to give me some kind of plan.	
Sense of Purpose	☐ I like to think that my work reflects my personal values. I try to make decisions based on what's important to me and balance that with the organizations mission.	☐ If the organization demands a certain way of working, who am I to ay if it's right? My work isn't designed to follow a value system. It's my life the way it is – I can't just change it around to make it into something else.	
Personal Identity	☐ I really like my job but it doesn't define who I am. I have other pursuits outside of work that are just as important to me as my job.	☐ I live for my work. Why not? What is the first question you are usually asked? It's "what do you do?" Not "how do you describe yourself?"	
Personal and Professional Networks	☐ I really appreciate my family, my friends, and my colleagues. There have been many times that those relationships have helped me out of a jam. I like to stay connected to those people who are close to me and take personal interest in their lives.	☐ Networking is really helpful in case there's a downturn and my company downsizes me. I wish I could stay more current with what my friends and colleagues are doing outside of work, but there never seems to be enough time.	
Reflection	☐ I make some room each day to reflect on my decisions and my actions. I like to look back and see if there was another choice I could have made that would have improved the outcome.	☐ There are always so many things to do. It's like running ahead of an avalanche. I don't have time to sit back and daydream about where I am going and how I am getting there.	
Skill Shifting	☐ My skills could prove useful to this organization in another role. I can translate my experiences outside of work into developmental opportunities.	☐ Every position calls for a distinct set of skills. It takes a long time to develop those skills. It's inefficient to take somebody out of a familiar role and ask them to perform some other functions.	
Relationship to Money	☐ I like things. Doesn't everybody? I don't want to get caught in the trap of working long hours and taking on extra assignments in order to pay for things that I don't really reflect my interests or values. I make money work for me I think about my purchases before I make them.	☐ I have responsibilities. They cost money. There's no way around that. Besides, there's a certain expectation that when you reach my position you can afford a certain kind of lifestyle. You have to work hard if you want the good things in life.	
Other:_____	☐	☐	

Which of the resiliency skills above are challenging for your <u>team?</u>

NOTES DURING CLASS*: (not part of your preparation for class)*

When you <u>arrive</u> for class, please "document" the resiliency levels you identified for yourself and your team for all the content on the "Resiliency" Flip-charts in the room using the little stickers.

Notes from Debrief:

The 4 F's of Change:
1. **Fight**
2. **Flight/Flee**
3. **Freeze**
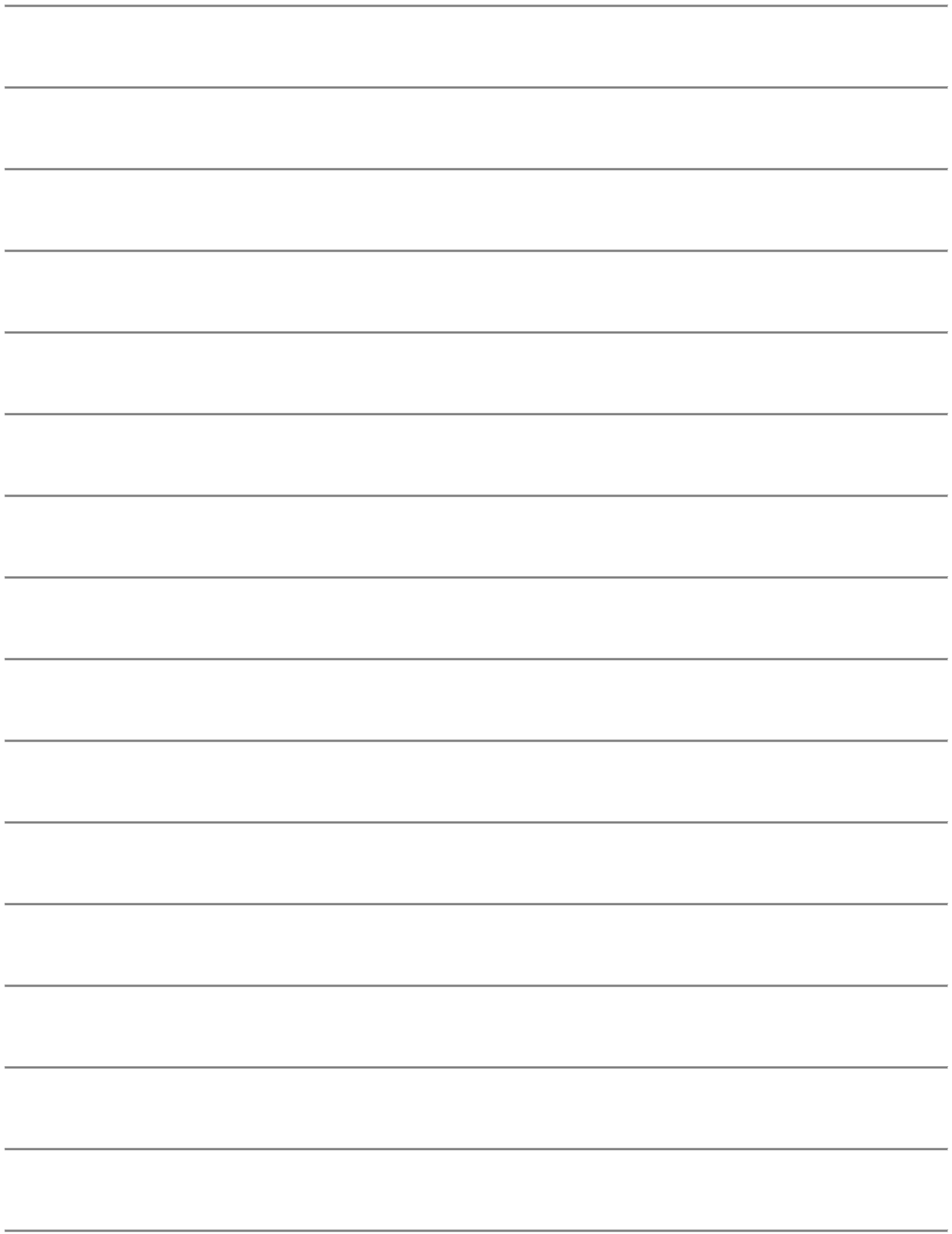4. **Flow –** *going with the flow*

Self-Care Strategies to Increase my resiliency:	Team-care Strategies to Increase Team Resiliency:

How can you use this tool with your team?

Action Step to INCREASE Resiliency within 24 hours:

One Action to Increase MY Resiliency:	One ACTION to Increase Team Resiliency"

Following class: Reflect on the level of resiliency you and your team has currently and how <u>you</u> can hold new conversations to improve your team's ability to adapt to change. *Act on your "action steps" above within 24 hours and reflect on how this has impacted the attitude and ability to "go with the flow!"*

Adapted from <u>Managing at the Speed of Change</u> by Daryl Connor
~ Originally created by Diane Pisanos~ Adapted for Teams striving to improve quality and safety by Deborah Center~

Notes:

Leadership & Introduction to Coaching Review
Quality and Safety Initiatives

Outline

1. **Pearls from Leadership & Introduction to Coaching:**
   - **Reflection: What is being used? Integrated? Remains unclear?**

2. **Leadership competence: Active Listening**
   - **Challenge Exercises: becoming aware of our filters, distractions, & why we don't listen**

3. **Coaching in the Moment**
   - **Exercise**

4. **"Just Say No!"**
   - **Exercise on boundaries and fixing**

5. **Coaching simplified**
   - **Self-coaching exercise on Be→Do→Have**

"The test of a good coach is that when they leave, others will carry on more successfully."
Author Unknown

Review of Leadership & Coaching Pearls

Review and recall the Leadership & Coaching content and reflect on the following questions:
What have you used the most?
What have you used the least?
What remains unclear?
What has influenced you as a leader the most?
What would you like more of?
How can you connect what remains unclear with your coach?

Topic	Used Most	Used Least	Remains Unclear
1. Ability to choose (Our attitude & thoughts influence our actions)			
2. ACT model: accept, change/confront, travel			
3. Adult-adult conversations vs. parent child (Authentic Conversations)			
4. Agenda → is the coachee's			
5. Always 2 or more realities			
6. Amygdale hijacking			
7. Attitude-commitment-resources triangle			
8. BE → DO → HAVE			
9. Being in charge of yourself; power within			
10. Breakdown before breakthrough			
11. Centered/focused/present			
12. Change/crisis; danger or opportunity			
13. Change; what you have control with/what do you not have control			
14. Circle of control/influence			
15. Communication frameworks			
16. Dual roles → Requires clarity and frequent check-in			
17. The 4 F's: fight---flee--- freeze OR flow			
18. Inquiry/curiosity			
19. LISTEN – 80/20 Rule			
20. Neutrality			
21. New story: cognitive rehearsal			
22. Ownership/accountability vs. victim, blame			
23. Past-present-future			
24. Pause/create space/quiet time/reflection			
25. Personalities-diversity: DISC			
26. Question – Question – Question → *No fixing*			
27. Strength Awareness			
28. The 5 Agreements – *Ground Rules*			
29. There's no such thing as failure; only feedback; MLE's			
30. Triangulation; victim, rescuer, persecutor			
31. Understand before being understood			
32. Vision-higher self-where we want to go-what we want to have happen			

Without trust there is no relationship & without a relationship, there is no coaching

Diane Pisanos & Deb Center Leading Quality Initiatives: Coaching for Leaders 2011

What are your challenges?
List 5 current challenges you face at work:

Three Challenges related to Others:	Two Challenges related to Self:
1. _____ 2. _____ 3. _____	1. _____ 2. _____

Sharing Exercise: *(2minute each)*
   A. **Coachee: Share one of your challenges.**
   B. **Coach: Listen for understanding and pay attention to your own self-talk while listening.**

Debrief: Listening Challenges - *Why we don't listen fully*
What is Your Listening Challenge?

List:	Name it:
	What is your self-talk when faced with this? **How can you pause your self-talk to listen more fully?**

Listening Exercise: *(2 minute each)*
   A. **Coachee: Share a new challenge.**
   B. **Coach: Listen for understanding. Pay attention to if you interrupt your own self-talk and your desire to interrupt the speaker.**

Debrief:

Coaching in the Moment ~ Review

Exercise: *Please Stand (to simulate being caught in the moment) (4 minutes each)*
   A. Coachee: Share a new challenge.
   B. Coach: Use the Coaching in the Moment QUESTIONS ONLY

Powerful questions for "Coaching in the Moment"

1. **What are you feeling right now?**
   (awareness→ what the feedback is about→ managing the emotions)
2. **What are your thoughts about the issue?** (are your thoughts limiting your perspective?)
3. **What is your desired outcome?**(clear image, articulate)
4. **What do you need to get there?** (attitude, behavior, resource)
5. **What is in your way?**(obstacles, limitations, blind spots)
6. **What are you willing to commit to internally?** (within yourself)
   Externally? (to the outer world)
7. **What's next?**
8. *Repeat as necessary! Return to question #1!*

Notes during coaching:

DEBRIEF: *Take time to reflect with the group-*
- Assess the relationship, the process & results
- What went well in the moment?
- What was the learning for the coachee? For the coach?

Transformational Coaching is the art of empowering people to improve their effectiveness, in a way in which they feel helped moving forward and are part of the process

Just Say No! *to being fixed*
Growing as a leader by learning to not fix people!

<u>Why say NO?</u>

1. People don't want to be fixed.

2. People best learn & grow through discovery.

3. You are not being the role model they need you to be for optimal performance & outcomes.

4. Fixing dishonors individual potential.

<u>How do I do it differently?</u>

1. Become comfortable with being uncomfortable...then you know you are stretching, learning, empowering, growing AND self-managing!

2. Have compassion for the other person and ask yourself: what questions can I ask that will help them discover more about themselves, their potential, their greatness (that they are not presently seeing) <u>and</u> also stay on purpose *verses asking questions that help me solve their issue for them*.

3. Being "relational" will do nothing but serve everyone involved and open doors. (Life comes down to a relationship with ourselves and others). Share your own vulnerability and learning.

4. When we are stuck as human beings it is usually because we are not feeling good about ourselves in the present moment, or we have not "gotten on the balcony" and really looked at all our options and choices, or we have not figured out how to get re-inspired.

5. Be clear what you really want to have happen.

6. Emotions are your friend: they are feedback for us.

7. Help people regain a sense of "self" and control.

8. Remember the power of breathing, reflecting, listening, letting go, and staying in the present moment (where our creativity and our true internal source of power lies).

9. How do you as a leader want to be remembered?

How do I stop a fixer? *(New scripts to creating a healthy boundary for my own growth and learning.)*

    A. Acknowledge being fixed – name it
    B. Make a new request

    Your new script: *Cognitive Rehearsal*

Exercise on Boundaries and Fixing: *(90 seconds each)*

    A. Coachee: Share a new challenge with the goal of finding their own solution. Be clear to communicate your own needs and stop any questions that provide you with answers or suggestions to solve your challenge.
    B. Coach: Trying to fix and give solution.

Debrief:

"Be—DO—Have"
Designing my work as a coach! "Self-Coaching"

#1 The Outcome: The future, the vision, the dream. Statement of how it will be.

Descriptors from all the senses: anything that gives clarity, pictures, images, visualizations.

> HAVE

#2 The Foundation: Who I am – my current self - and what I bring to my work, my future, strengths, passions, skills and talents, personality, accomplishments, values, beliefs.

> BE

Who I want to become – my future self - where I can grow, and how I want to "BE" in the future.

#3. Strategies; how I will get there, daily practices. Things that remind me to stay on purpose, inspired and courageous! (Discipline = freedom). How I will celebrate my daily accomplishments? Step by step, day by day……………………The Mission.

> DO

Integrating to my Daily Work:

WHO I AM – How I show up	**BE**
STATEGIES – Doing the right thing	**DO**
MY FUTURE – to have what you want!	**HAVE**

Final Notes:

Without trust there is no relationship & without a relationship, there is no coaching.
Without relationship & coaching, there is no quality.

THE END……..or the beginning!

Notes:

PSYCHOLOGY OF PERSUASION AND SOCIAL INFLUENCE

KARREN KOWALSKI

Director, Grants and Projects

Colorado Center for Nursing Excellence

PURPOSE

- **Increase likelihood that people will say yes to your request**

- **Using the principles of persuasion you will become 5 – 6 times more successful**

RECIPROCITY

- **Process: People feel obligated to give back to those who have given to them**
  - Not just willingness but obligated

- **Research: Person (s) must feel special, personal and unexpected**
  - i.e. Wait staff

RECIPROCITY cont.

- **Concessions**
  - Incompatible positions
  - I make a concession; there is an obligation that you make a concession
  - When higher level request response is "No"
  - Can then retreat to a lower level position
    - i.e. Boy Scouts

SCARCITY

- **People want what they can't have**
- **The focus is on what they may lose**
  or
- **What they are prevented from having if they do not comply with the request**
- **People are more mobilized to action by the thought of losing something than by all the advantages of having xxx**
  - i.e. iPhone, exclusivity, new information

AUTHORITY

- **People are willing to follow the leader**
  - To defer to the directions of legitimate authorities
- **The Credible Communicator**
  - Knowledge
  - Trust worthiness: source of expert information – honest and unbiased
    - i.e. Send a letter (e-mail) of introduction with qualifications

AUTHORITY cont.

- **Mentors can introduce you without it sounding boastful**

- **The best approach is to mention the weakness first and balance with a strength**
  - Marketing slogan demon

CONSISTENCY

- **People prefer to be consistent with their existing commitments**
  - Begin with something small and then expand from the small to larger
    - Restaurateur and reservations

- **Action and public commitment**
  - In writing is more powerful

CONCENSUS

- **One way people decide what they should do is to look at what others around you have done in this situation:**
  - "Most of my patients in this circumstance made X decision"
  - Ask 'on board' old timer to share why the change is important with the resistant "old timers" who are not 'on board'
  - People don't want to be in conflict with peers

LIKING

- **We prefer to say yes to those we like**
- **We like people who are like us**
- **Come to sincerely like those people we want to persuade**
- **Approaches:**
  - Identify: Similarities, parallels and compliment the other person.
  - Look for admirable attributes

Evaluation of Program For Quality Workshop

Course: *Advanced Leadership for Quality Workshop*	Date: August 11, 2011

Regarding the Overall Course:	**Scale**					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion / N/A
1. The presentations promoted active learning.	○	○	○	○	○	○
2. Appropriate reference materials were provided.	○	○	○	○	○	○
3. The presenters were responsive to questions from the audience.	○	○	○	○	○	○
4. The content was presented in an understandable way.	○	○	○	○	○	○
5. The content was presented in a logical sequence.	○	○	○	○	○	○
6. Handouts and other materials were clear.	○	○	○	○	○	○
7. I learned new skills that will be useful to me as a leader / coach.	○	○	○	○	○	○

Regarding the Objectives of the Course: Did the following presenters meet your expectations based on the stated objectives for their content?	**Scale**				
	Exceeded Expectations	Met Expectations	Partially Met Expectations	Did Not Meet Expectations	No Opinion/ N/A
1. Karren Kowalski – *Communication; Walk the Talk; Exploration of Capstones*	○	○	○	○	○
2. Marianne Horner – *Exploration of Capstones*	○	○	○	○	○
3. Diane Pisanos – *Change for Quality Outcomes; Revisiting Coaching in the Moment*	○	○	○	○	○
4. Deb Center – *Resilience; Revisiting Coaching in the Moment*	○	○	○	○	○

Please explain any responses of partially met or did not meet expectations:

_____

_____

_____

_____

What did you find to be the most worthwhile content?

_____

_____

_____

_____

Thank you for your responses to our evaluation. We appreciate your participation in this work for the last three days. We look forward to working with you over the next six months on your capstones and coaching! Safe travels home!

Final Evaluation of the Advanced Leadership for Quality Workshop

Date: August 9-11, 2011						
Regarding the Overall Course:	**Scale**					
	Strongly Agree	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**	**No Opinion / N/A**
1. The workshop has provided additional tools to utilize as a leader/coach.	◯	◯	◯	◯	◯	◯
2. The workshop was a valuable use of my time and resources.	◯	◯	◯	◯	◯	◯
3. The workshop has reinforced my desire to leader and /or coach.	◯	◯	◯	◯	◯	◯
4. The workshop has provided insights that will be useful in other areas of my life.	◯	◯	◯	◯	◯	◯
5. The supporting bibliography & bio-sketches were valuable resources for me.	◯	◯	◯	◯	◯	◯
6. My intent to pursue a formal academic education is higher today than Day 1 of this course.	◯	◯	◯	◯	◯	◯

Please identify:

- **The role in which you will implement learnings gained:**

  _____

  _____

- **Presentations which modeled useful teaching modalities that you can implement in your practice:**

  _____

  _____

  _____

- **The most valuable content:**

  _____

  _____

  _____

- **The least valuable content:**

  _____

  _____

  _____

- **Areas not adequately covered:**

  _____

  _____

  _____

Other Comments:

  _____

  _____