

## **LENS Meeting Summary – Baltimore, MD** **September 16 – 17, 2008**

### **Team Presentation Summaries**

#### **Sound Community Services (SCS)**

The staff from SCS presented their experiences with selecting a project that had to be altered due to a change in direction by state funders and regulators. However, they did indicate that even in changing their project they were able to focus on the two areas identified in team climate surveys as having the widest gaps – impact and influence. There was obvious growth from members of the team based on their ability/willingness to not only lead the presentation, but their interaction with each other and their executive as well as their responsiveness to other teams during the question/answer dialogue. The group shared how they had arrived at a productivity formula for line staff that they believe will allow them to be successful when the Medicaid Rehab Option(MRO) does go live in Connecticut.

Three activities were identified by the team as concrete steps they had taken to work on impact and influence:

- Supervision of line staff in the community setting,
- Creating a sense of team with supervisors and colleagues in the field, and
- Learning new methods of communication with each other and direct reports.

Remaining challenges identified by respondents include the “us-them” language that still seems to play a large part in discussions by the team and how this might affect future leadership growth for this team and throughout the company. The question was asked if they felt the same dialogue remains “on the other side of the house” (SCS is a merged company). The CEO indicated that she felt some of the next steps in leadership growth for the team might include getting more involved at the state and national level. It was suggested that SCS try and position themselves to be a state leader for the MRO when it does finally roll out in Connecticut as a next step in their work together as a LENS team.

#### **Fayette Companies**

In contrast to previous LENS meeting, the CEO did the entire presentation for Fayette. He indicated that there had been some significant changes in the last three months due to statewide budget constraints that made their work together very difficult. This included the need to lay off 15 staff and concern that additional programming will be altered down the road if the state budget is not reinstated. As well, the CEO is beginning to plan for retirement and as such has moved his primary

location out of state and was physically absent from the office for longer periods of time than in the past.

Fayette has been addressing three goals as a LENS team: clarity, accountability, and reward and recognition – again the three areas of largest gaps that were identified from the team climate surveys. Plans have been to focus extensively on clarity and accountability. The leadership team often has multiple new programs and agenda issues that drive activities and have noted that they do not always devote appropriate time to things once they have started. The presentation included many things that Fayette was planning to do and fewer steps of things actually accomplished. They did indicate that they have almost completed a competency document which outlines – by job description and title – the skills and expectations needed for each employee. The document is also designed to provide the information needed for employees if they wish to seek advance in the company. The project has been driven by previous confusion and lack of standards about how to find such information for all positions.

It was also identified that the team is moving from “protection” of staff to transparency of staff information in an attempt to provide more accountability for themselves and all employees. Enhanced supervision is being carried out, including taping of sessions so that supervisors have the opportunity to provide specific feedback on skills. Fayette believes this is moving them to a model of supervision built on training and coaching and will better enable them to have the right employee for the right job.

In discussion with the team, LENS participants indicated that it still felt like Fayette was functioning in a reactionary way and not following through on their stated goals, even though they could identify that not doing so made it more difficult to focus on clarity and accountability. The team was asked what has changed in their leadership team functions as a result of involvement with the LENS. They identified that they have better follow through on projects, enhanced communication with each other, and that the executive team is making more decisions. The team did indicate that they had not made very effective use of their coach recently and would like to return to more work with her, especially based on the excellent results that other participants were noting in their organizations.

### **Community Services Group (CSG)**

The CSG project changed over the course of involvement with the LENS as the organization tried to determine how to focus the building of leadership competencies in a manageable way. The project resulted in the integration of recovery and resiliency models in 12 residential mental health programs that are geographically dispersed. Team members identified common areas of improvement both in the recovery initiative and leadership competencies through a very open and shared approach of individual leadership development plans framed by the organizational leadership development plan and feedback from the team climate survey. Three primary areas of focus are being addressed: accountability and clarity, team development, and leadership development among “emerging” leaders.

CSG identified multiple opportunities for action learning through their LENS involvement, primary among them was the need to act rather than simply talk. Through work with both the individual and organizational coach, team members became more proficient in project management techniques. As well, because of the geographic diversity of the programs included in the project, the opportunity existed for the recovery leadership team to work together in ways many of them had not previously had opportunity based on lines of reporting. Through the work of the LENS and the implementation project, CSG has created a number of resources for even greater use throughout their organization and to be shared as resources in the field for other agencies wishing to incorporate more recovery and resiliency models in their programs. CSG identified a number of lessons learned, including:

- Use team effectiveness surveys to discuss team dynamics,
- Team membership should include those closest to the project and enable them to make decisions,
- Use action learning to develop staff while getting the work done,
- Link strategic objectives with performance management and,
- Use performance management to integrate the “project” into daily routines.

The organization has prepared next steps based on involvement in the LENS. These include completing feedback assessments with the remainder of the executive leadership team, redesigning their corporate leadership training program based on a model of competency, and the integration of project successes in the organization’s broader strategic plan through talent management and recruitment and retention strategies.

### **Discussion With NCHL/Lessons Learned**

Marie Sinioris and Joyce Anne Waino joined the LENS group by telephone for discussion of lessons learned that ACMHA and NCHL had identified.

1. The role of the CEO in the work of the LENS team is critical and the time necessary to effectively do this work is often underestimated.
2. More time needs to be spent up front on performance goals to provide greater specificity. By better identifying specific performance measures a deliberate guide to action can be created.
3. Learning collaboratives that are more homogenous may have better success. With three different project foci, it was difficult to bring participants together for shared learning activities.
4. It is important to connect the work of the ELNS to organizational and business goals.
5. More emphasis should be placed on action learning. If the collaborative had a better up-front focus on shared performance metrics we might have had even greater success.
6. Additional information about coaching requirements and expectations of what has worked for others in the past should be provided up front.

7. A better understanding of the LENS – descriptions, resource commitments, outcomes expected, etc. would be helpful. More vetting of teams to participate before bringing them together face to face would enable a stronger start and less time wasted.

## Feedback From Teams

Questions were presented to LENS participants to facilitate a feedback discussion, including:

- How has involvement in the LENS impacted your organization?
- What were the most important foci?
- How is the LENS different from other leadership training?

### Group Feedback

- All three organizations indicated that coaching has provided the fundamental changes in leadership development. They also indicated that the fact that the coaches had prior experience with their organization was critical to the coach's ability to move individuals and the team forward more effectively. To a varying degree those have been individual and or team changes. Each organization approached coaching in a different manner.
  - SCS made individual coaching available to all team members. The majority of this coaching was done by telephone to stretch resources as far as possible.
  - CSG used an individual coach and an organizational coach for different parts of their programming. In addition, the expectation was made to individuals that the leadership competencies they were working on would be shared so that teammates could also assist them in more rapid change. The organizational coach worked with the team to help them learn project management skills as well as to assist individuals in practice of new competencies.
  - Fayette Companies began work as a team with their coach, who also was available to team members individually. A good deal of the work with the coach was suspended about three months ago as the company began addressing some significant financial shortfalls and restructuring. They plan to return to more active coaching as a team moving forward.
- Calls among the teams that occur between face-to-face meetings might be more useful if they were structured in a manner that today's meeting was, e.g. a presentation was offered with time for reaction and questions. Participants indicated they felt this learning was more useful than trying to select general topics for discussion.
- Teams reported that they liked the structural model provided by NCHL – it is behavioral in nature, measurable, replicable, all the things that good learning looks for. There was some discussion that perhaps one could take the model structure, secure an effective coach, and gain just as much traction as is possible by also being involved in the action learning sessions with

different teams. After spirited conversation, only SCS seemed to believe this was an appropriate way to move forward in learning.

- The teams felt that they needed to do more presentations about their learning so that they can provide some level of impact to the field as well as continue to strengthen new leadership competencies among individual members of the team. It was suggested that NCHL/ACMHA prepare a monograph about the entire experience and that teamed we look to present the model and its impact on behavioral health at conferences such as the National Council. Teams did feel that the ACMHA audience (Summit attendees) was not the right place to do this sharing as the breadth of people in the room would gain less from the experience as most were not running organizations. CSG noted that their first presentation as a team is scheduled in October at their statewide provider conference.
- It has been suggested that the Human Resource Alignment Assessment be one of the first things done with the next cohort. By understanding that each participating team has some similar gaps there might have been an easier way to focus the performance metrics of the cohort by selecting some of these practices to focus on as a whole, rather than establishing separate projects that are difficult to measure against each other.
- It was noted that ACMHA should focus more on creating the business case for training focused on *leadership competencies* and not worry as much about the project focus. Time management became very unwieldy with two issues requiring equal attention. LENS participants noted that the work of leadership competency based on the NCHL model is something the behavioral health field needs to focus on more squarely rather than project-driven leadership development.

### LENS Evaluation – Year Three

Kris Ericson shared with the teams the planning that has gone on between ACMHA and NCHL for the evaluation phase of the LENS. It will include redoing the individual leadership competency assessments (360s) and the Organizational Climate Surveys. As well, an external evaluator will work with teams and coaches through interview processes to gather additional information that will form the basis of learnings from the ACMHA pilot. Additionally, there is some discussion of bringing the teams together in Santa Fe at the Summit for a final face-to-face meeting if funding to do so could be found.

LENS participants added suggestions on what they felt might enhance their last year together or the evaluation or thoughts they would like to see considered for the next cohort.

- We need to do some publishing in our field of lessons learned and competencies gained to get others involved and to enhance the literature in the field, specifically behavioral health as a distinct part of healthcare

- There is some concern that a good deal of the direct reports have changed for those who would be completing 360s. Is this typical? Does this change the validation of the results and the individual's ability to see if gaps have decreased?
- Contact with a LENS site from the physical health quarter that we could learn from them how they created action learning opportunities would be helpful.
- Telephonic conferences moving forward should be focused on presentations and responses as a tool for learning.
- We should present all three different coaching models used by the teams as viable options to be considered in the future, trying to discern what was and was not the most helpful for groups, and identify the amount of resources required to use each model. It may not be necessary that the coaching model for each team in a cohort be identical, but it may be helpful to others in the future to think through a variety of options that could be used.
- We should incorporate some didactic teaching – either in person or on the phone – about change management. The creation of leadership competencies should create change. Managing that on top of learning new skill sets related to leadership requires extra support.
- There was concern by one participant that the HR Alignment Assessment is not appropriate for smaller organizations and that issues of reward and recognition are not as appropriate in this industry because of limited resources. Others felt that perhaps ACMHA and LENS participants can enhance the field by examining the issue of reward and recognition and learning to “do it differently” as merit increases and the like are not as easily achievable.