

Power of Purpose

Fundamentals of Improving Resident Satisfaction Today

"ActionTRAC":
Survey Response Process



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Agenda

- Introduction and Discussion
- Something Different Plan
 - STOP!
 - Listen
 - Learn
 - Confirm
 - Plan
 - Validate
 - Implement
- Tools and Materials

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Survey Reactions (A/K/A Subtle forms of insanity)



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Survey Reactions (A/K/A Subtle forms of insanity)

- Paranoia – “They” are out to get us.
- Delusions –
 - Here is why the survey is wrong.
 - They are all lying.
- Obsessive / Compulsive Disorder – “I’ve got an idea, let’s do more of the same thing faster and better.”
- Bipolar disorder – “Everything is terrible” then “Everything is wonderful.”


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We needed to:



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Surveys: Report Cards vs. Ice Breakers

- Opportunity to celebrate areas of excellence
- An invitation to begin a discussion
- Information to guide further inquiry
- A tool not a test

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So, we made a plan: ActionTRAC

- I. Stop "solving the problem"
 - A. Share the results
 - B. Enlist support
 - C. Narrow the focus
- II. Listen
 - A. Gather feedback
 - B. Evaluate the data
- III. Learn
 - A. Confirm your understanding
 - B. Create a multidisciplinary team
 - C. Analyze the feedback
- IV. Confirm
- V. Plan
- VI. Validate
- VII. Implement
 - A. Communicate
 - B. Refine

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"solving the problem"



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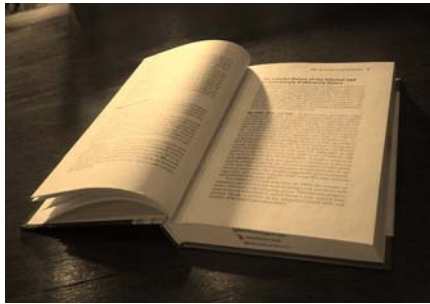
Stop solving “the problem”

- **The fix is not the fix**
 - Do not focus on the problem.
 - Do not “fix” anything.
 - Do not even think about the solution.
- **Focus on the people**
 - Communication is the solution.
 - Concentrate on the process.
 - Make people feel heard and listened to.
 - And, they will fix the problem!

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Share the results



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Share the results

- Quickly present all survey results to all stake holders
 - Residents in all levels of care, Families, the Board and Associates
- Present it in the manner most appropriate for the audience
 - Collaborative – Large Group via Power Point
 - Contentious – Small Group (I.E. by neighborhood) with a handout
 - Own the meeting – This is your meeting, address confrontation with immediate invitation for a private discussion following the group gathering

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Enlist Support



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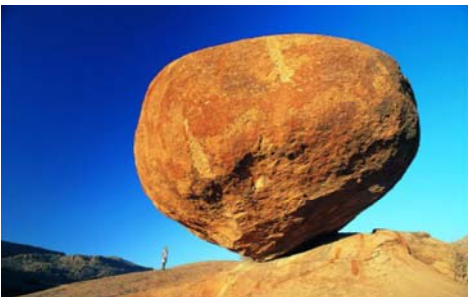
Enlist Support

- Help and Input
 - Residents of all areas
 - Families
 - Board Members
 - Associates
 - Managers
- Use a Steering Committee
 - Guide / Direct
 - Evaluate
 - Advise
 - Review
 - Advocate

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Narrow the focus



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Narrow the focus

- Understand Key Drivers - the Survey Correlations.
- Present to the Steering Committee to:
- Identify action areas of concentration (i.e.):
 - Pick the BIG ROCKS
 - Three or four areas that are most impactful
 - Focus on the BIG ROCKS to “move the needle”
- While addressing those areas that will be most impactful, don't overlook easy wins

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Listen!



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Listen!

- Gather feedback
- Create multiple avenues to listen:
 - Resident Governance
 - Focus Groups
 - Lunches
 - Social Teas
 - “Neighborhood” or Building meetings
 - Etc.

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Listen! (cont'd)

- In your listening sessions **do not**:
 - agree or disagree
 - attempt to provide solutions
 - be tempted to over-promise
 - host large gatherings (over 10) if you think the meeting will not largely be constructive
- In your listening sessions **do** (Tom Hammond Method):
 - Ask open-ended questions, then listen
 - Drill down and ask for participants to clarify to specifics, then listen
 - Listen past the words to the meaning and the experience
- Then, expect Residents to tell you this was the best meeting they have ever attended

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Learn



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Learn


Gather your teams and prepare to present to the Steering Committee:

- Look for trends in feedback
- Pay attention to the meaning or emotion
- Did multiple people / groups mention the same problem?
- Are there any with correlation to Key Drivers?
- Make certain you clarify expectations
- Is there a common thread to the issues expressed?
- Does addressing it make sense?

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Confirm



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Confirm

- Present what was “Learned” to Steering Committee
 - Present Focus Group feedback data
 - Discuss perceived trends
 - Discuss emotion of difficult issues
 - Discuss potential correlations to Key Drivers
 - Confirm that they see what you are seeing
 - Select Key Areas of Concentration for Action Planning and Improvement

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Plan



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Plan

- Engage the Multi-Disciplinary teams to develop action plans
 - Greatest resources dedicated to our most influential issues
 - Develop step by step actions to be completed
 - Assign accountable leaders for each outcome
 - Set a time line
 - Establish how success will be measured
- Create a communication matrix to promote each step of the plan and highlight resident guided changes

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Validate



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Validate

- Present the plan to the steering committee for:
 - Feedback,
 - Input,
 - Validation and
 - Endorsement.
- Incorporate their input.
- Once adopted by the steering committee, the plan is ready for implementation.

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Implement

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graph TD; A[The Right Team] --> C((Successful Implementation)); B[Engagement] --> C; D[Testing/Training] --> C; E[Hit Milestones] --> C; F[Communicate] --> C;
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Implement

- Put the plan into action!

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Communicate

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Communicate

- The Process used
- The Feedback received
- The Validation provided
- The Action Plan as approved
- The Progress toward

The Resident's Plan

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Questions?

Thank you for participating



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Survey Response Planning Tools:

Steering Committee Charter
Focus Group Charter

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Sample Steering Committee Charter

Survey Response Steering Committee Charter

Introduction: The community implements a satisfaction survey for Residents and Associates, typically on an annual basis. The results of the survey are used to inform and guide action planning for impactful change. The survey and resulting action plans represent an opportunity to make meaningful change for the benefit of our residents, associates and culture; represent a significant investment of time and resources; provide an opportunity for enhancing our competitive advantage and reduce our vulnerability to risk.

Overview: Successful survey response requires proper planning and oversight, definitive actions, full implementation including communication and periodic review of results. To facilitate high resident and associate "buy-in" to the survey response philosophy and validate action planning we are creating a collaborative steering committee of key stakeholders to review, advise, validate and oversee the survey response implementation process.


Purpose: Assuring that there is a methodical evaluation of the survey, focused understanding of resident and associate feedback, development of rational and achievable action plans, effective resident and associate communication, full action plan implementation and, clearly defined and communicated tie between the survey findings, action plans and beneficial results, the survey process will be successful in improving the resident and associate experience.

Tasks: The Survey Response Steering Committee will have the following tasks:

1. To review the survey responses from Independent Living, Assisted Living, Skilled Nursing and Associates
2. Provide guidance regarding Focus Group Topics and Disciplines
3. Evaluate Focus Group feedback
4. Validate targeted Action Plan foci
5. Review and approve final Action Plan
6. Review and approve Action Plan Communication Matrix
7. Champion the full implementation of the final Action Plan

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Sample Steering Committee Charter (continued)

Composition: The Committee will be comprised of stakeholders who are vested in assuring meaningful change for the benefit of our residents, associates and culture. The chair will be determined by the President of SantaFe Senior Living. Final membership will be determined by the chair of the committee in consultation with the Executive Director of the community from among recommendations by the Resident Governance Group(s), Department Directors, Corporate Advisory Board and Department Directors.

Suggested representation will be as follows: Corp/AB Member, Resident Governance Group Member, IL Resident Member, AL Resident (or Family) Member, SNF Resident (or Family) Member, Department Director Member, Supervisory Level Associate Member, Entry Level Associate Member, At Large member, Appointed Chair.

Responsibilities: The responsibilities of the Committee include participation at meetings, selfless advice and counsel, confidentiality, advocacy on behalf of the final action planning outcome.

Success Criteria: The measures of success and change will be:


- A. Assure open discussion of survey results
- B. Receipt of meaningful feedback from residents and associates
- C. Development of implementable Actions Plans
- D. Effective communication of the survey response process
- E. Implementation of Action Plans
- F. Connection of the Residents and Associates with the improved results
- G. 5 point improvement in Overall Mean Satisfaction Score on next survey

Meetings: It is estimated 3-4 meetings will be called by the Chair as the Chairman and Committee may determine

Duration: The committee should complete its role in approximately 6 to 10 weeks.

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Sample Focus Group Charter

Survey Response Focus Groups

Introduction: The community implements a satisfaction survey for Residents and Associates, typically on an annual basis. The results of the survey are used to inform and guide action planning for impactful change. The survey and resulting action plans represent an opportunity to make meaningful change for the benefit of our residents, associates and culture; represent a significant investment of time and resources; provide an opportunity for enhancing our competitive advantage and reduce our vulnerability to risk.

Overview: Successful survey response requires proper planning and oversight, definitive actions, full implementation including communication and periodic review of results. To facilitate high resident and associate "buy-in" to the survey response philosophy and validate action planning we are creating a collaborative steering committee of key stakeholders to review, advise, validate and oversee the survey response implementation process.

Purpose: Focus groups allow for broad participation of stakeholders in the identification, communication and clarification of key driver issues. Broad participation encourages multiple perspectives and diverse engagement in the understanding of survey findings.

Tasks: The focus group process will have the following tasks:

1. To review identified Key Driver Information
2. Engage diverse groups in discussion regarding the meaning of the areas of concern
3. Communicate "Ground Rules" to each Focus Group prior to listening session
4. Conduct focus groups on Steering Committee Validated Topics and Target Participants
5. Keep within minutes
6. Capture all comments
7. Provide no answers to questions as a part of the focus group agenda

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Sample Focus Group
Charter (Cont)

Composition: The Focus Groups will be comprised of volunteer stakeholders who are vested in providing meaningful feedback regarding their thoughts, perspectives and opinions for the benefit of our residents, associates and culture.

Final membership will be determined by the chair of the committee in consultation with the Executive Director of the community from among volunteers.

Responsibilities: The responsibilities of the focus group participants are as follows:

- Participation at a meeting.
- Observations, advice and counsel.
- Confidentiality.
- Adherence to Ground Rules, and
- Advocacy on behalf of participation in the process.

Ground Rules: All participants will acknowledge and respect that:

1. Each group had a specific topic – we introduced that topic and asked that everyone stay focused on providing feedback related to that topic.
2. One person will talk at a time – THIS IS REALLY IMPORTANT!!!!
3. All feedback – positive and negative – is welcomed, there are no repercussions for anything that is shared.
4. Everyone will have a chance to speak – in fact participation from everyone is needed.
5. Each perspective will be noted, and we may need to ask for additional information or clarifying questions to fully understand an issue/concern.
6. Facilitators will not be and should not be addressing issues. Facilitators should seek information, ask clarifying questions and document responses.

Meetings: It is estimated 3 to 6 Focus Groups will be called by the Chair as the Chairman and Committee may determine.

Duration: The focus groups should complete their role in approximately 2 to 4 weeks.

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Sample Action Plan Topic

Area of Focus: Quality of meals

Measurable Goal: Current mean score is 83.5. Move mean score to current benchmark score, 85.2.

Concerns/Facts (Gather additional information from cross tabulations and verbatim comments.)

- Residents who have lived here for less than 2 years seem to be most satisfied.
- Residents who are older than 85 are the least satisfied.
- Residents are also very dissatisfied with temperature of food and menu design – this could be influencing opinions of quality of food.
- Do the meals consist of poor quality items or are the items cooked poorly? What is the exact concern?
- Themes in the comments indicate lack of variety and balanced meals.

Action Item	Responsible Party	Budget	Due Date
Conduct a mini-survey to gather more feedback from residents on what improvements they would like to see	Dining Director and Resident Services Coordinator	Printing Supplies \$50.00	March 15
Focus group of employees – ask servers what complaints they commonly hear from residents regarding menu selection, quality of food, temperature of food, etc.	Dining Department (Shift Manager)	0	April
Implement a task force that includes resident representatives and dining staff to revise the current dining menu	Dining Director and Resident Services Coordinator	0	June

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2006 – 2007 Action TRAC Communication Matrix

Communication Format	Target Audience	Communication Focus	Subject Matter Discussed	Frequency	Other Comments
Quarterly Care Plans	Assisted Living & Skilled Nursing Families	This format is specifically focused on being a link to families and building a relationship between the family and managers/care staff	Opportunity to listen to our customer; discuss resident care needs/changes; provide responses to suggestions/complaints; forum for families speak about their family member(s)	Quarterly (currently on-going)	Care plans have been instrumental in developing a more tangible bond between The Plaza management/care team and the family. Going forward this forum will also be used to educate families on the upcoming survey and provide a more fluid forum for communication.
The Communicator Newsletter	Assisted Living and Skilled Nursing Families	Focused on highlighting changes in all service areas and a forum for different managers to communicate how their services work.	All areas of service in Assisted Living; communicate any changes to services.	Quarterly (currently on-going)	The newsletter was created in response to the families wanting more timely info regarding service updates and changes at The Plaza.
Follow-up (Mock) Survey	Assisted Living Residents	Designed to "take the pulse" on issues that scored poorly on the last survey.	Opportunity to listen to our customer; personal care services; dining services; interaction with staff; and other miscellaneous areas.	One time	Testing new format for the next survey distribution.

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COMMUNICATION MATRIX Continued...					
Communication Format	Target Audience	Communication Focus	Subject Matter Discussed	Frequency	Other Comments
Assisted Living meeting w/ all families	Assisted Living Families	Opportunity to listen to our AL families; allow team to gain perspective from comments made in survey	Focused on areas we scored poorly in and encouraged dialogue to better understand concerns.	One time	This was a tough meeting that degraded into an unproductive session. In the future meetings with the families will be smaller and more focused.
Assisted Living and Skilled Nursing Quarterly Call Program	Assisted Living and Skilled Nursing Families	Opportunity to listen to our AL and SN families; allow for relationship building with our families.	Opportunity to listen to our customer; answer questions; get feedback and respond to any concerns.	Quarterly	All families will be contacted by telephone from one of the managers at The Plaza on a quarterly basis.
"Neighborhood" meetings (focus groups)	Independent Living Residents/Assisted Living Families	Proposed format for educating residents on Service Trac's format. This will also provide a smaller forum for its residents, AI residents and AI family members.	Opportunity to listen to our customer; provide education on survey; seek clarification on any questions regarding the survey; provides opportunity to reiterate all changes that have occurred since the last survey.	One time for each "neighborhood" leading up to the next survey.	This format will hopefully mitigate the negative mentality that manifested in the larger meetings for AL families and IL Residents.

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