Polarities Are Everywhere:
How Do You Measure, Monitor and Improve How You Manage Them?

ODN – Baltimore, October 2011

Presented by: Barry Johnson, Jake Jacobs, and Leslie Depol

This material is based on work by Barry Johnson and Polarity Management Associates
Polarities are:

- Interdependent pairs
- Energy systems in which we live and work
Why bother?

Goal:
1. Achievement
2. Speed
3. Sustainability

When addressing these issues:
• Strategic Management and Complexity
• Change
• Conflict
• Chronic Issues
• Cross Cultural Issues (Intra-national and International)
I believe that the central leadership attribute is the ability to manage polarity.

Peter Koestenbaum

8 Polarities in “The Fundamental State of Leadership”
From Building The Bridge As You Walk On It by Robert E. Quinn

Spontaneous; Expressive AND Self-disciplined; Responsible
Compassionate; Concerned AND Assertive; Bold
Mindful; Reflective AND Active; Energetic
Principled; Integrated AND Engaged; Involved
Realistic; Questioning AND Optimistic; Constructive
Grounded; Factual AND Visionary; Hopeful
Confident; Secure AND Adaptive; Flexible
Independent; Strong AND Humble; Open

10 Polarities in “Level 5 Leadership”
From Good To Great by Jim Collins

Self AND Organization
Willfulness AND Humility
Debate AND Unity
Candor AND Diplomacy
Reality AND Faith
Deep Understanding AND Simplicity
Discipline AND Entrepreneurship
Technology Fads AND Pioneering
Evolutionary AND Revolutionary
Preserve Core AND Stimulate Change

12 Leadership Polarities
From Polarity Management Associates

Conditional Respect AND Unconditional Respect
Task AND Relationship
Candor AND Diplomacy
Responsibility AND Freedom
Confidence AND Humility
Analysis AND Encouragement
Control AND Empowerment
Grounded AND Visionary
Structure AND Flexibility
Logic AND Creativity
Individual AND Work Group
Planning AND Implementation

8 Leadership Polarities
From Lost in Transition by Richard Elsner & Bridget Farrands

To shake things up AND To preserve
To be open to events AND To be intentional about results
To develop bonds AND To keep distance
To seek help to learn about the organization AND To give value by showing how to succeed or avoid failure
To impose AND To facilitate
To go fast to perform AND To go slow to prepare
To clean out AND To develop
To support the team AND To serve the hierarchy and/or the wider organization
11 Important Organizational Polarities
From Polarity Management Associates

- Centralized Coordination AND Decentralized Initiatives
- Recognize the Individual AND Recognize the Team
- Reduce Cost AND Improve Quality
- Competing with Others AND Collaborating with Others
- Stability AND Change
- Celebrating Our Differences AND Celebrating Our Commonalities
- Care for My Part of the Organization AND Care for the Whole Organization
- Showing Respect for Every Person AND Showing Respect Based on Performance
- Getting the Job Done (task) AND Building Relationships
- Taking Care of the Organization AND Taking Care of the Customer
- Work AND Home

7 Organizational Polarities
From Managing on the Edge by Richard Tanner Pascale
(Left column = the 7 areas of “Excellence” from In Search of Excellence)

- Strategy Planned AND opportunistic
- Structure Elitist AND Pluralistic
- Systems Mandatory AND Discretionary
- Style Managerial AND Transformational
- Staff Collegiality AND Individuality
- Shared Values Collegiality AND Individuality
- Skills Maximize AND Meta-mize

1 Organizational Polarity
From Built to Last by Collins & Porras

- Preserve the Core AND Stimulate Progress

3 Organizational Polarities
From The Three Tensions by Dominic Dodd & Ken Favaro

- Profitability AND Growth
- Today AND Tomorrow
- The Whole AND The Parts

10 Strategic Management Polarities
From Strategy Synthesis by Bob de Wit & Ron Meyer

- Logic AND Creativity
- Deliberateness AND Emergentness
- Revolution AND Evolution
- Markets AND Resources
- Responsiveness AND Synergy
- Competition AND Collaboration
- Compliance AND Choice
- Control AND Chaos
- Globalization AND Localization
- Profitability AND Responsibility
Leaders who manage polarities well outperform those that don’t.

Organizations that manage polarities well outperform those that don’t.

High Performing Organization

Low Performing Organization

Leadership Development

Organization Development

and
Leveraging Polarity Energy Systems

See It

Map It

Include Key Stakeholders

Tap It - #1 Assess Present Realities

Tap It - #2 Action Steps

Tap It - #3 Early Warnings

Continue Tapping - #1, 2, 3
Competitive Advantage

Autonomous Business Units

and

Can't Compete
Effective Leader

Clear (Solution)  Flexible (Solution)

Tight  Loose

Rigid (Problem)  Ambiguous (Problem)

Ineffective Leader
Welcome to The Polarity Assessment™ for Organizations: A 5-Step Process

The Polarity Assessment™ will help deliver your Mission AND Margin.

Either would make it worth using. We will do both. Here’s our dual purpose:

- **PURPOSE 1** – To support you in becoming a more successful organization – right now and over time.

  The Polarity Assessment builds on what you’ve accomplished in the past and prepares you to be even more successful in the future. You define success, be it numbers on the bottom line, behavior that reflects the culture you want to create, how people feel or any other measures that matter to you. The Polarity Assessment will help you get things done that make a difference for your organization better, faster and easier. Over time, you will gain more and more of the benefits of managing key polarities well and pay for fewer and fewer of the costs of managing them poorly.

- **PURPOSE 2** – To increase your organization’s ability to see, map, and tap the power of polarities

  All polarities work the same way, every time, all the time. Learn how to manage one well and you know how to manage them all well. Seeing polarities means recognizing when one or more underlying ones are impacting the work you’re doing. Mapping polarities means identifying the “upsides” and “downsides” of each pole, what you will achieve by managing it well, what will happen if you manage it poorly. Action Steps and Early Warnings help ensure you have concrete ways to tap the upsides and avoid the downsides of a polarity pole. Tapping the Power of Polarities means taking what you’ve learned about how to manage one well and are putting it into practice in your daily work with desired results.

Learn more about The Polarity Assessment™ and how it can enhance your organization.
WHAT MATTERS TO YOU MATTERS TO US

Your mission matters to us. It’s your organization’s reason for being. All of our work with you is aimed squarely on helping you achieve this mission. To achieve your organization’s mission you might need to improve your bottom line, implement your strategic plan, insure profitable growth or be a place where people love to work. It is some version of moving toward your preferred future more efficiently and more sustainably.

Long Term Results that Pay Dividends Over Time
In the long term we work with you to increase everyone’s capacity to see, map and tap polarities. Do this well and you have access to a powerful and limitless supply of energy to create your preferred future and sustain success over time.

Track Your Progress and Course Correct.
You got what you measure. So measure the polarities most important to ensuring your success, take action based on what you learned from your assessment, and re-assess periodically so you can adjust to changing realities over time.

Immediate Impact and Return on Your Investment
In the short term, we start with what is most important to you right now. This might come through jump starting a critical initiative, launching a project, or strengthening and aligning a leadership team anywhere in your organization.

Sustain Success
Tie your efforts to both poles of a polarity and you increase sustainability significantly because polarities are indestructible.
So, Map, and Tap the polarities contained

- Strategy Implementation
- Culture Change
- Organization Alignment
- Business Process Redesign
- Leadership Development
- Team building
- Conflict Resolution
- Coaching
THE POLARITY MANAGEMENT ASSESSMENT PROCESS

Step 1 – Link Your Polarity Assessment™ to the Organization’s Strategy, Issues and Opportunities

The Polarity Assessment is about seeing, mapping and tapping polarities that will have the greatest positive impact in your organization. In this first step, you will begin thinking through the polarities that will provide the greatest leverage in achieving your organization’s strategy. You will also explore how polarities may help you better understand the issues and opportunities you’re facing right now – both those inside and outside your organization.

Step 2 – Design Your Polarity Assessment So That it Fits Your Organization’s Unique Challenges and Opportunities

In this second step, you’ll build polarity maps for each of the key polarities you identified as being most important to your organization. You’ll identify what you are currently doing and what you plan to be doing in relation to going after the upsides associated with your polarities. You’ll quantify some early warning signals that can alert you when you are beginning to experience the downsides of a polarity so you can course correct. The items you include in your maps automatically get converted into your assessment instrument. You’ll also begin planning how you’ll analyze and communicate your results and recommendations to the rest of the organization.

Step 3 – Assess How You Are Currently Managing Your Organization’s Key Polarities

In this third step you will engage a broad base of key stakeholders to assess how well you are currently managing your organization’s key polarities. People participating in the process will log onto our secure web site and complete the assessment. Once the assessment period is closed, your results are immediately available.

Step 4 – Understand Your Assessment Results

The purpose of this fourth step is to understand the results from your assessment so you can make smart decisions about how to manage your key polarities better in the future.

There are four basic questions you’ll explore together in this step:

1. What are our assessment results?
2. What do they tell us about how we have been managing these key polarities to date?
3. Why do we believe we achieved the results we did?
4. What new ideas do we have about how to manage these polarities better in the future?

Step 5 – Take Action and Sustain Success

This fifth step is where your Polarity Assessment work comes together and stays together. You’ll agree on Action Steps and Early Warnings that will help you tap the power of your organization’s key polarities. You’ll put plans in place for how to build on what you’re already doing well, improve on what you want to do better, track your progress and course correct over time. You’ll explore more ways and places where you can apply polarity thinking to add value in your organization. All of these plans will be integrated into a Continuity and Change Road Map that provides clear direction to your organization’s sustained success.
1 UNDERSTAND UNIVERSITY HOSPITAL

The Polarity Assessment™ is about seeing, mapping and
tapping polarities that will have the greatest positive impact in your
organization. In this first step you will begin thinking through the
polarities that will provide the greatest leverage in achieving your
organization's strategy. You will also explore how polarities may
help you better understand the issues and opportunities you’re
facing right now – both those inside and outside your
organization.

Purpose
To make sure our Polarity Assessment is clear, strategic and
delivers the best results it can for our organization.

Outcomes
- Understand what polarities are and how they work
- Identify polarities that have the greatest impact on
  whether we achieve our preferred future strategy or not
- Agree on our Polarity Assessment Project Plan, our
  work as a Polarity Assessment Team, and the support
  we will have while doing it

How We’ll Do It
- Overview The Polarity Assessment Principles,
  Outcomes, and 5-Step Process
- Understand What’s Happening Inside and Outside Our
  Organization
- What Polarities Are, How They Work, and How To See,
  Map and Tap Them
- Identify the polarities underlying our most strategic issues
  and opportunities
- Develop the Who, What, How, When and Why for our
  Polarity Assessment Plan
2 BUILD AN ASSESSMENT for UNIVERSITY HOSPITAL

In this second step, you'll build polarity maps for each of the key polarities you identified as being most important to your organization. You'll identify what you are currently doing and what you plan to be doing in relation to going after the upsides associated with your polarities. You'll quantify some early warning signals that can alert you when you are beginning to experience the downsides of a polarity so you can course correct. The items you include in your maps automatically get converted into your assessment instrument. You'll also begin planning how you'll analyze and communicate your results and recommendations to the rest of the organization.

Purpose
To incorporate your most strategic challenges and opportunities into a polarity-based assessment

Outcomes
- 4-8 Key Polarities mapped with 3 strategic items in each quadrant agreed upon
- Prioritized Action Steps and Early Warning signals identified (to be taken now and later)
- Assessment details finalized: Demographics for data sets, Feedback questions, etc.
- Assessment-ready Polarity Maps completed
- Details of The Polarity Assessment Project Plan agreed upon

How We'll Do It
Follow the online Polarity Assessment wizard and follow our Guidelines for Creating Assessment Ready Polarity Maps
## 2 Build an Assessment for University Hospital

<table>
<thead>
<tr>
<th>Left Pole</th>
<th>AND</th>
<th>Right Pole</th>
<th>Section</th>
<th>Title</th>
<th>Status</th>
<th>Read</th>
<th>View</th>
<th>Copy to Our Maps</th>
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<tbody>
<tr>
<td>Anticipate Customer Needs</td>
<td>AND</td>
<td>Respond to Customer</td>
<td>Hospitality</td>
<td>Maintain Customer Service Leadership Over</td>
<td>★★★</td>
<td>11.9</td>
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<tr>
<td>Develop Others</td>
<td>AND</td>
<td>Educate Yourself</td>
<td>Hospitality</td>
<td>Maintain Customer Service Leadership Over</td>
<td>★★★★</td>
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<tr>
<td>Equip People</td>
<td>AND</td>
<td>Manage Costs</td>
<td>Hospitality</td>
<td>Maintain Customer Service Leadership Over</td>
<td>★★★★</td>
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<td>AND</td>
<td>Hold Responsible</td>
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<td>Maintain Customer Service Leadership Over</td>
<td>★★★★</td>
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<td>AND</td>
<td>Conditional Respect</td>
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<td>Maintain Customer Service Leadership Over</td>
<td>★★★★</td>
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<tr>
<td>Combining the Best of Your</td>
<td>AND</td>
<td>Envisioning Compelling</td>
<td>RTSC</td>
<td>Preferred Future</td>
<td>★★★★</td>
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<td>AND</td>
<td>Advocating for What You</td>
<td>RTSC</td>
<td>Building Understanding</td>
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<tr>
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<td>AND</td>
<td>Knowing the Outside Of Your</td>
<td>RTSC</td>
<td>Making Reality A Key Driver</td>
<td>★★★★</td>
<td>10.6</td>
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<td>![Copy to Our Maps]</td>
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<tr>
<td>Planning for Your Future</td>
<td>AND</td>
<td>Being in Your Future Now</td>
<td>RTSC</td>
<td>Thinking and Acting in Real Time</td>
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<td>AND</td>
<td>Inviting Participation</td>
<td>RTSC</td>
<td>Engaging and Including</td>
<td>★★★★</td>
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<td>![Copy to Our Maps]</td>
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<tr>
<td>The Organization Achieving</td>
<td>AND</td>
<td>People Achieving Their Full</td>
<td>RTSC</td>
<td>Creating Community</td>
<td>★★★★</td>
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<td>AND</td>
<td>Care for Community</td>
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<td>Organization AND Community</td>
<td>★★★★</td>
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<td>AND</td>
<td>Employee Interests</td>
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<td>Company Interests AND Employee Interests</td>
<td>★★★★</td>
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<td>![View]</td>
<td>![Copy to Our Maps]</td>
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<tr>
<td>Conditional Respect</td>
<td>AND</td>
<td>Unconditional Respect</td>
<td>Universal</td>
<td>Conditional and Unconditional Respect</td>
<td>★★★★</td>
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<td>![Copy to Our Maps]</td>
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<td>AND</td>
<td>Change</td>
<td>Universal</td>
<td>Continuity AND Change</td>
<td>★★★★</td>
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<td>![Copy to Our Maps]</td>
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<tr>
<td>My Department</td>
<td>AND</td>
<td>The Whole Organization</td>
<td>Universal</td>
<td>My Department. AND The Whole Organization</td>
<td>★★★★</td>
<td>11.3</td>
<td>![View]</td>
<td>![Copy to Our Maps]</td>
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<tr>
<td>Organization</td>
<td>AND</td>
<td>Customer</td>
<td>Universal</td>
<td>Organization AND Customer</td>
<td>★★★★</td>
<td>11.7</td>
<td>![View]</td>
<td>![Copy to Our Maps]</td>
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<tr>
<td>Relationships</td>
<td>AND</td>
<td>Tasks</td>
<td>Universal</td>
<td>Relationships AND Tasks</td>
<td>★★★★</td>
<td>11.3</td>
<td>![View]</td>
<td>![Copy to Our Maps]</td>
</tr>
<tr>
<td>Short Term</td>
<td>AND</td>
<td>Long Term</td>
<td>Universal</td>
<td>Short Term and Long Term</td>
<td>★★★★</td>
<td>8.9</td>
<td>![View]</td>
<td>![Copy to Our Maps]</td>
</tr>
</tbody>
</table>
2. **Build an Assessment for University Hospital**

### Action Steps

**How will we gain or maintain the positive results from focusing on this left pole?** What? Who? By When? Measures?

1. Make sure everyone understands the core values and knows how to “walk the talk” in their daily work.
2. Benchmarking, establishing “what is” (Michael and Patrick)
3. Identify and name what is most valued in the status quo (M and P)
4. 

### Early Warnings

**Measurable indicators (things you can count) that will let you know you are getting the downside of this left pole.**

1. People are acting in ways consistent with our core values from the past are getting in the way of our being successful in the future.
2. Measurable complaints of boredom (M and P)
3. Existing ways of doing things are not meeting current needs (ex: dialup Internet when we

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### Continuity and Change

**Greater Purpose Statement (GPS)** - why balance this polarity?

#### Achieving Our Goals

- Values = positive results from focusing on the left pole
  - A. We live our core values.
  - B. We know what parts of our current plans need to stay the same.
  - C. We agree on which processes should remain unchanged.
  - D. 

- Values = positive results from focusing on the right pole
  - A. We are clear about the new values we need to live in the future.
  - B. We know what new plans we need for the future.
  - C. We have defined the processes we need in the future.
  - D. 

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### Action Steps

**How will we gain or maintain the positive results from focusing on this right pole?** What? Who? By When? Measures?

1. Identify the new values needed in the future and help people translate them into their daily work.
2. Establish milestones (M and P)
3. Set targets (M and P)
4. Full engagement. Identify stakeholders and identify what is required to get buy in from them (M and P)

---

### Early Warnings

**Measurable indicators (things you can count) that will let you know you are getting the downside of this right pole.**

1. We see people acting in ways that violate our core values from the past we need to hold onto in the future.
2. Measurable complaints of counterproductive chaos (M and P)
3. 

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Polarity Map™
### Build an Assessment for University Hospital

<table>
<thead>
<tr>
<th>Order</th>
<th>Demographic</th>
<th>Choices</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Gender</td>
<td>Female, Male</td>
</tr>
<tr>
<td>2</td>
<td>Highest Education Completed</td>
<td>Diploma, Associate Degree, Bachelors Degree, Masters Degree, MD, PhD, Advanced Practice, Post Grad</td>
</tr>
<tr>
<td>3</td>
<td>Role</td>
<td>Audiology, Biomedical Engineering, Chaplain, Child Life, Dental, Dietician, Engineering, Exercise Therapy, Hospi</td>
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<tr>
<td>4</td>
<td>Position</td>
<td>Administration, Education, Faculty in School, Manager, Nurse Practitioner, Practice Lead</td>
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<tr>
<td>5</td>
<td>Years in Health Care Services</td>
<td>1-5, 6, 10, 15, 16-20, 21-25, 26-30, 31-35, 36-40, 41-45, 46-50, 51-55, over 55</td>
</tr>
<tr>
<td>6</td>
<td>Which Program do you report to?</td>
<td>Cardiac Sciences, Critical Care, Emergency, End of Life (Hospice), Health Promotion and Prevention (Pul</td>
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<tr>
<td>7</td>
<td>geography</td>
<td>north america</td>
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</tbody>
</table>
## 2 Build an Assessment for University Hospital

Add New [+]

<table>
<thead>
<tr>
<th>Order</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>What is your biggest excitement for the future of University Hospital?</td>
</tr>
<tr>
<td>2</td>
<td>What is your biggest concern for the future of University Hospital?</td>
</tr>
</tbody>
</table>
3 Conduct The Assessment for University Hospital

In this third step you will engage a broad base of key stakeholders to assess how well you are currently managing your organization's key polarities. People participating in the process will log onto our secure web site and complete the assessment. Once the assessment period is closed, your results are immediately available.

Purpose
Learn from a critical mass of employees and stakeholders how well they think our organization is managing its most strategic polarities.

Outcomes
- Internal assessment administrator supported by PMA's Polarity Assessment administrator
- Prioritized Action Steps and Early Warning signals identified (to be taken now and later)
- Assessment details finalized: Demographics for data cuts, Feedback questions, etc.
- Assessment-ready Polarity Maps completed
- Details of The Polarity Assessment Project Plan agreed upon

How We'll Do It
Follow the online Polarity Assessment wizard and follow our Guidelines for Creating Assessment Ready Polarity Maps.
3 CONDUCT THE ASSESSMENT for UNIVERSITY HOSPITAL

1. Welcome Letter

2. Assessment Instructions

Add New +

Dear [AdminName],

Thank you for participating as an Administrator or Distributor in The Polarity Assessment™ for Organizations: A 5-Step Process. Below is a brief instruction for you to link your staff to the [AssessmentName] Instrument.

ADMINISTRATOR & DISTRIBUTOR INSTRUCTIONS

You have two ways to link your staff to the Instrument. On or immediately before [LaunchDate], (1) Give your staff a text link via email, Word, newsletter, etc. (provided below) or (2) Install our custom Polarity Assessment button on your website and direct your staff go to that page (code attached). The text link is easier, the button is more professional. Both of them result in the same thing: your staff landing on The Polarity Assessment login page.

1. To give your staff a text link

Communicate this link to your staff in any way convenient: you may choose to include the NOTES FOR YOUR STAFF (below) in your welcome letter.

[surveylink]

2. Installing our custom Polarity Assessment button on your website

For your convenience we have designed a Polarity Assessment launch button and the code to control it. It’s free and relatively easy to install (by an IT/web person). It’s only function is to link directly to the survey – there is no advertising / marketing / monitoring of any kind, and you are free to remove it when the survey is over.

Please provide your web developer the button code snippet (attached) to be placed on your website.

Path: div > div > p

Save  Save As...
3 Conduct The Assessment for University Hospital

Congratulations, your Assessment is almost ready for Launch. Follow the three steps below to complete the process.

1 Confirm Checklist

Click the Confirm Checklist button below to open the Checklist and confirm your Assessment details. Verify that all tabs within the Checklist contain the Complete status.

To make any last minute edits, click the Edit button in the column header to jump to that page and enter your changes. Return to the Launch tab once you’re done, and proceed to step 2.

2 Review Instrument

Click the Review Instrument button to view the Instrument as Respondents will see it.

NOTE: The Instrument preview is fully interactive but not connected to a database. Responses are not collected, so feel free to go anywhere and click anything.

3 Lock and Launch Assessment

Once you have completed steps 1 and 2, click the Launch button to Lock and Launch your Assessment. Your Assessment will be available to Respondents on your selected Launch date.

Note: You will no longer be able to edit the contents of your Assessment once it is locked. However, the following administrative Tabs will remain open for editing: Stakeholders, Administrators, Distribution, and Communications. Additionally, Dates will remain open until they have each individually passed.
### Preview Assessment

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<tbody>
<tr>
<td>Gender</td>
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</tr>
<tr>
<td>Highest Education Completed</td>
<td>Masters Degree</td>
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<tr>
<td>Role</td>
<td>Dietician</td>
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<tr>
<td>Position</td>
<td>Manager</td>
</tr>
<tr>
<td>Years in Health Care Services</td>
<td>16-20</td>
</tr>
<tr>
<td>Which Program do you report to?</td>
<td>Health Promotion and Prevention (Public Health)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Almost Never</th>
<th>Seldom</th>
<th>Sometimes</th>
<th>Often</th>
<th>Almost Always</th>
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</thead>
<tbody>
<tr>
<td>1. open communication that increases trust.</td>
<td></td>
<td></td>
<td>![O]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. each member of the team clearly documenting the care and services they provide.</td>
<td></td>
<td></td>
<td>![O]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. having the necessary resources to provide care and service based on the patient’s body, mind and spirit needs.</td>
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<td>4. team members failing to modify care or services based on patient or family needs.</td>
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<tr>
<td>5. the work culture fostering respect for each other.</td>
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</tr>
</tbody>
</table>

*How frequently in the past 6 months have you observed or experienced*
Your comments regarding "open communication that increases trust."

Communication up is guarded.

<table>
<thead>
<tr>
<th></th>
<th>Almost Never</th>
<th>Seldom</th>
<th>Sometimes</th>
<th>Often</th>
<th>Almost Always</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>open communication that increases trust.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2.</td>
<td>each member of the team clearly documenting the care and services they provide.</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>3.</td>
<td>having the necessary resources to provide care and service based on the patient's body, mind and spirit needs.</td>
<td></td>
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<tr>
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<td>team members failing to modify care or services based on patient or family needs.</td>
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<tr>
<td>5.</td>
<td>the work culture fostering respect for each other.</td>
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</tr>
</tbody>
</table>

How frequently in the past 6 months have you observed or experienced:
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

This fourth step is about understanding the results from your assessment so you can make smart decisions about how to manage your key polarities better in the future. The last task in this step is to capture what you have learned and agree on how these lessons can best be shared with the rest of the organization.

Purpose

To gain insight into how effectively we are tapping our polarities and the impact this has on our ability to achieve and sustain success.

Outcomes

- We understand our assessment results
- Insight into why we got the results we got
- We know where to adjust our attention and resources to manage these polarities more effectively

How We'll Do It

Review our Polarity Assessment™ Results and learn:

- What results confirm what we thought we knew and why?
- What results surprise us and why?
- We know where to adjust our attention and resources to manage these polarities more effectively
- What does this mean we need to be paying attention to as we go about re-visiting our Action Steps & Early Warnings?
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

Total respondents: 325
Mean
Comparison Flags
Dataset A (Y)
Dataset B (G)
View / Exit

100%
50%
0%

Individual Competency AND Team Competency
Routine Task Care AND Scope of Practice Care
Patient Safety AND Staff Safety
Conditional Respect AND Unconditional Respect
Standardized Care AND Autonomous Care
Cancer AND Diplomacy
Technology Innovation AND Practice Innovation
Vertical AND Horizontal
Patient Satisfaction AND Staff Satisfaction
Medical Care AND Whole Person Care
Change AND Stability
Framework Driven change AND Project Driven change
Margin / Cost of Service AND Mission Quality of Service

Great
Danger
Disaster

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Polarity Map™
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

Polarity Map™

Margin and Mission

Greater Purpose Statement (GPS): why balance this polarity?
Sustainability of Best Places to Give and Receive Care

Values = positive results from focusing on the left pole

A. the organization’s commitment to provide cost effective care and service. (56)
B. money being available to support needed improvements. (30)
C. pride in the fiscal soundness of the organization. (36)

Mission / Quality of Service

A. actions demonstrating a caring and compassionate culture. (62)
B. the organization having money available to provide adequate tools and resources to deliver quality care. (46)
C. the organization’s strong market share providing a sense of job security. (40)

Cost of Service

A. cost containment being more of a concern in the organization than a caring and compassionate culture. (33)
B. money being available for the operating needs rather than for delivery of quality care. (44)
C. a sense that the organization is at risk if the market share due to decreasing quality of care. (60)

Margin / Cost of Service

A. a lack of understanding of each person’s responsibility for the overall cost of care and service. (48)
B. lack of funds being available to support improvements in operations. (23)
C. concern for the financial health of the organization. (27)

Fears = negative results from over-focusing on the left pole to the neglect of the right pole

Inability to Sustain Best Places to Give and Receive Care

Deeper Fear from lack of balance

Total respondents: (325)
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

Mean

Values = positive results from focusing on the left pole

A. the organization’s commitment to provide cost effective care and service. (68)
B. money being available to support needed improvements. (30)
C. pride in the fiscal soundness of the organization. (36)

Values = positive results from focusing on the right pole

A. actions demonstrating a caring and compassionate culture. (62)
B. the organization having money available to provide adequate tools and resources to deliver quality care. (46)
C. the organization’s strong market share providing a sense of job security. (40)

Mean

Margin / Cost of Service

A. cost containment being more of a concern in the organization than a caring and compassionate culture. (33)
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A. a lack of understanding of each person’s responsibility for the overall cost of care and service. (49)
B. lack of funds being available to support improvements in operations. (28)
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Inability to Sustain Best Places to Give and Receive Care

Deeper Fear from lack of balance

Fears = negative results from over-focusing on the left pole to the neglect of the right pole

Fears = negative results from over-focusing on the right pole to the neglect of the left pole

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## Results of the Assessment for University Hospital

### View/Edit Datasets

<table>
<thead>
<tr>
<th>All</th>
<th>Select demographics below to include.</th>
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<tr>
<td>Gender</td>
<td>Female, Male</td>
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<tr>
<td>Highest Education Completed</td>
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<td>Role</td>
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</tr>
<tr>
<td>Position</td>
<td>Administration, Education, Faculty in School, Manager, Nurse Practitioner, Practice Leader, Research, Staff, Other</td>
</tr>
</tbody>
</table>
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

Margin and Mission

Values = positive results from focusing on the left pole

A. the organization’s commitment to provide cost-effective care and service. (68)
B. money being available to support needed improvements. (30)
C. pride in the fiscal soundness of the organization. (30)

Values = positive results from focusing on the right pole

A. actions demonstrating a caring and compassionate culture. (52)
B. the organization having money available to provide adequate tools and resources to deliver quality care. (46)
C. the organization’s strong market share providing a sense of job security. (40)

Inability to Sustain Best Places to Give and Receive Care

Fears = negative results from over-focusing on the left pole or the right pole

A. a lack of understanding of each person responsibility for the overall cost of care and service. (49)
B. lack of funds being available to support improvements in operations. (28)
C. concern for the financial health of the organization. (27)

Mean

[Graphs showing the mean values for each question with categories such as Almost Always, Often, Some times, and Seldom]
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

Overview  Summary Score  Polarity Maps  Demographics  Feedback  Report

Total respondents: (325)

Show  Comments  |  Mean  ▶️Full (325) □ Custom (0)  □ Flags  ▶️Dataset A (5) □ Dataset B (30)  □ Edit

Comments
Comments by respondents on questions in this quadrant.

Margin / Cost of Service

- Values = positive results from focusing on the right pole
  A. the organization's commitment to provide cost effective care and service. (68)
  B. money being available to support needed improvements. (30)
  C. price in the fiscal soundness of the organization. (36)

- Values = positive results from focusing on the left pole
  A. cost containment being more of a concern in the organization than a caring and compassionate culture. (33)
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Mission / Quality of Service

- Values = positive results from focusing on the right pole
  A. actions demonstrating a caring and compassionate culture. (62)
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- Values = positive results from focusing on the left pole
  A. the lack of understanding of each person's responsibility for the overall cost of care and service. (45)
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  C. concern for the financial health of the organization. (27)

Fears = negative results from over-focusing on the left pole to the neglect of the right pole

Inability to Sustain Best Places to Give and Receive Care

Deeper Fear from lack of balance

Comments
Comments by respondents on questions in this quadrant.

A1 Too often they are concerned with cost and lose effective.
A2 Cost effective care and service often does not take in account the patients actual needs. Clearing the beds seems to be the first priority.
A3 I think the organization has good intentions but the budget puts a priority on where the cost effectiveness is going to be focused.
A4 Given the current client unfortunately health care is meshed within a business perspective and applications

A1 These come from other staff.
A2 as a team we try to deliver compassionate resident focused care but the age and design of the building makes this extremely challenging
A3 individual office/room areas work hard to develop this but it is base on the work site overarching leadership
A5 I have lost some faith within Fraser Health when they recently eliminated SW positions. We always seem to
4 RESULTS OF THE ASSESSMENT for University Hospital

Action Steps
How will we plan or maintain the positive results from focusing on this right pole? What? Who? By When? Measures?

1. Provide partnership infrastructure at point of care to enhance interdisciplinary ownership of practice and fiscal responsibility.
2. Develop staff competency with fiscal responsibility to partner in financial management.
3. Monitor, interpret and address financial reports that reflect revenue management and cost reduction.
4. adgfhjklmg

Values = positive results from focusing on the left pole

A. the organization’s commitment to provide cost effective care and service. (56)
B. money being available to support needed improvements. (30)
C. pride in the fiscal soundness of the organization. (35)

Mission / Quality of Service

Marginal and Mission

Values = positive results from focusing on the right pole

A. actions demonstrating a caring and compassionate culture. (62)
B. the organization having money available to provide adequate tools and resources to deliver quality care. (45)
C. the organization’s strong market share providing a sense of job security. (40)

Mission / Quality of Service

Early Warnings
Measurable indicators (things you can count) that will let you know you are getting the downside of this right pole.

1. Increased complaints from patients through surveys, patient representative, manager and staff.
2. Increased comments like“ all they care about is the bottom line.”
3. Increased turnover of staff exit interviews reflect people leaving profession, burn out.
4. Increased litigation and sick calls.
5. Declining balanced scorecard results.

Fear = negative results from over-focusing on the left pole to the neglect of the right pole

Fear = negative results from over-focusing on the right pole to the neglect of the left pole

Fear = inability to sustain best places to give and receive care

Deeper Fear from lack of balance

43

34

1. Declining bottom line, margin in the red.
2. Projects are over budget.
3. Revenues low for services rendered.
4. Increased LOS, cost per patient day, supplies, increased hours per patient day, increased litigation and overtime.
5. Decline in balanced scorecard results.
4 RESULTS OF THE ASSESSMENT for UNIVERSITY HOSPITAL

<table>
<thead>
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<tr>
<td>Practice Leader</td>
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<tr>
<td>Administration</td>
<td>30</td>
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<tr>
<td>Other</td>
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<tr>
<td>Manager</td>
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<td>Education</td>
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<tr>
<td>Nurse Practitioner</td>
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<tr>
<td>Research</td>
<td>2</td>
</tr>
<tr>
<td>Faculty in School</td>
<td>1</td>
</tr>
</tbody>
</table>
5 Take Action and Sustain Success for University Hospital

This fifth step is where your Polarity Assessment™ work comes together and stays together. You’ll agree on Action Steps and Early Warnings that will help you tap the power of your organization’s key polarities. You’ll put plans in place for how to build on what you’re already doing well, improve on what you want to do better, track your progress and course correct over time. You’ll explore more ways and places where you can apply polarity thinking to add value in your organization. All of these plans will be integrated into a Continuity and Change Road Map that provides clear direction to your organization’s sustained success.

Purpose

To identify those action steps and early warnings that will ensure we tap our polarities, achieve desired results, and sustain success.

Outcomes

- Plans for monitoring and continuously improving our ability to tap the polarities we assessed now and in the future
- Insight into other ways polarity thinking and doing might be helpful in our organization
- Understanding what we’ve learned in this process and agree how we are going to identify, assess, and manage critical polarities in our organization over time

How We’ll Do It

- Re-visit and upgrade existing Action Steps and Early Warnings
- Brainstorm new Action Steps and Early Warnings
- Develop plans to build on what you’re already going well, improve on what you want to do better, track your progress and course correct over time
- Explore other ways and places polarity thinking would add value in your organization
- Develop a Continuity and Change Road Map that prioritizes the work and provides clear direction to your organization’s sustained success
References for Implementing Polarity Thinking – Below are recent books that provide application and examples of Polarity Management in action

• Anderson, Kathy. Polarity Coaching: Coaching People and Managing Polarities. Amherst: HRD Press, 2010. Seven case studies showing coaching applications and how to use the polarity map as a wisdom organizer and action planning tool

• Johnson, Barry. Polarity Management: Identifying and Managing Unsolvable Problems. Amherst: HRD Press, 1994. Johnson shares a number of case examples in which the shift from seeing an issue as a problem to solving it as a polarity added real value for individual leaders and for organizations.


• Seidler, Margaret. Power Surge: A Conduit for Enlightened Leadership. Amherst: HRD Press, 2008. Seidler has the most extensive list of values pairs available. This book provides the “how to” in helping leaders supplement their strengths and keep them from becoming vulnerabilities.


References on Polarities as important - Several books have been written that indicate leaders and organizations that manage polarities/dilemmas/paradox well outperform those that don’t.

• Collins, James C. and Jerry I. Porras. Built to Last: Successful Habits of Visionary Companies. New York: HarperCollins, 1994. Authors identify the "Genius of the 'AND'" as a central variable that distinguished the "Gold" companies from the "Silver" companies. The whole book is based on managing the polarity of "Preserve the Core & Stimulate Progress." This could also be seen as the generic Stability & Change polarity.

• Collins, Jim. Good to Great: Why Some Companies Make the Leap…and Others Don’t. New York: HarperCollins, 2001. The “Genius of the ‘And’” continues as an important variable in this book and is identified as a key characteristic of leaders moving companies from Good to Great. There are 10 polarities identified as central to becoming a level 5 leader.

• Dodd, Dominic and Ken Favaro. The Three Tensions: Winning the Struggle to Perform Without Compromise. John Wiley and Sons, 2007. Authors interview executives from 200 companies and identify 3 important tensions (polarities) central to their organization’s effectiveness: Profitability & Growth; Today & Tomorrow; and, The Whole & Its Parts.
Polarity Management™ Bibliography


• Fletcher, Jerry and Kelle Olwyler. *Paradoxical Thinking: How to Profit From Your Contradictions*. San Francisco: Berrett-Koehler, 1997. “*After more than fifteen years of studying thousands of detailed examples of people performing at their best, Fletcher and Olwyler have found that individuals are always paradoxical when performing optimally and that each person has a particular combination of contradictory and paradoxical (polarity) qualities that work together to produce that person’s best work.*”


• Hampden-Turner, Charles. *Charting the Corporate Mind: Graphic Solutions to Business Conflicts*. New York: The Free Press, 1990. *Charles Hampden-Turner has written several books on the advantage of managing dilemmas in which his research shows that those companies that manage key dilemmas well outperform those that don’t.*


• Hickman, Craig R. *Mind of a Manager Soul of a Leader*. New York: John Wiley & Sons, 1990. *Support for the benefits of paradoxical thinking also show up in Hickman’s book the title of which is a fundamental polarity in leadership.*
Polarity Management™ Bibliography


- Johnston, Charles M. *Necessary Wisdom: Meeting the Challenge of a New Cultural Maturity*. Seattle: ICD Press, 1991. *Johnston identifies 5 key polarity domains within culture and asserts the importance of understanding and bridging polarities. Managing polarities are at the heart of wisdom and cultural maturity and how we “must learn to think and act if our future is to be a healthy one.”*

- Martin, Roger. *The Opposable Mind: How Successful Leaders Win Through Integrative Thinking*. Boston: Harvard Business School Press, 2007. *Drawing on research and interviews, Martin shows that truly successful leaders are skilled at holding two opposing ideas at the same time and reaching a synthesis that contains elements of both, but improves on each.*

- Pascale, Richard Tanner. *Managing on the Edge: How the Smartest Companies Use Conflict to Stay Ahead*. New York: Simon & Schuster, 1991. *Pascale identifies "managing contention better" as the key variable that separated the 14 companies that kept their "excellent" rating from the 29 that did not when looking at the 43 companies identified in the book In Search of Excellence. What he means by "managing contention" is managing polarities/dilemmas/paradoxes and he identifies 7 giving examples of each.*


- Sisodia, Raj, Jag Sheth, and David B. Wolfe. *Firms of Endearment: How World Class Companies Profit from Passion And Purpose*. Wharton School Publishing, 2007. *The authors discovered that the key indicator for whether a company is a great investment is the degree to which it manages the polarity of taking care of the stockholders & the stakeholders. In other words attending to company interests & the interests of the larger community in which the company exists.*