

## Otterbein St. Mary's

### High Performance Culture/Engaged Workforce (formerly Innovation/Culture)

Candidate organizations should describe in essay form how they systematically\* create and sustain a culture in which leaders and workforce members are actively engaged, focused on high levels of performance and committed to improvement/innovation that positively impacts customer satisfaction and employee satisfaction/engagement. Responses to this item will address the following:

- How do senior leaders create a healthy workplace environment characterized by high performance expectations and strong workforce engagement? **The key to the applicant exceeding the criteria requirements for High Performance Culture/Engaged Workforce is the fact that the "Otterbein Experience" is the foundation for a systematic approach to so many aspects of the item requirements (the four bullet point questions). Not only does this defined set of behavioral expectations focus the organization's collective ability to build and sustain both high performance expectations and strengthen the culture of workforce engagement, it defines the very specific behavioral expectations that will lead to these simultaneous "goals" being achieved and sustained. This work was done by the senior leaders of the organization who do not view culture as a passive result or as the responsibility of the Human Resources Director; the leaders view such culture development as their clear responsibility to create and model through aligned actions as leaders.**
- How do senior leaders promote a consistent focus on customer and employee satisfaction throughout the entire organization? **This focus is explicitly part of the comprehensively defined "Otterbein Experience," and as a result, the work of leaders in modeling the behaviors prescribed through the components of the "Experience" as their normal way of working will result in focus on customer and employee satisfaction being common to the daily activity of work and service to residents.**
- How are learning and development opportunities identified and provided to support workforce members in improving job performance and accelerating personal and career growth? **Again, the components of the "Experience" drive the focus of leaders, managers and supervisors to prioritize the development of team members as fundamental to their leadership role, and as they mature in the implementation of the "Experience," results will be good for the organization and will benefit each individual employee regardless of position or role. So many times, organizations reference that they "encourage" employee development rather than proactively ensuring it. The applicant's emerging approach to more proactive employee development, supported directly by the demonstrated emphasis on their foundational belief in development of people as the organization's responsibility, lifts the system beyond just meeting the basic requirements of the criteria. Clearly this component part of the "Experience" remains in early stages of development, but the adherence of the organization's leaders to these behavioral commitments will ensure that this systematic part of their culture and operations will produce high return on efforts and actions on a sustainable basis.**
- How do senior leaders create a focus on improvement and innovation within all aspects of operations? What steps do senior leaders take to keep workforce members informed about changes in the market, the customer base, technology, organizational performance, etc. to help them prepare for potential organizational and operating changes and identify potential improvement/innovation opportunities? **Every organization, even those who receive a rating of "exceeds" for their approaches, has room for improvement, and this is one area where such**

improvement opportunity is available. It is clear that the organization has the framework through which effective communication takes place, that improvements in operations are encouraged and that the employees are empowered to take action to implement such improvements, but the applicant does not demonstrate that it has a systematic approach to foster true innovation in operations. Support for breakthrough innovation requires a tolerance for risk in terms of the fact that not all new ideas or strategies actually succeed, and it is not explicitly part of the “Experience” to encourage and support the pursuit of innovation. True innovation support means that “failure” of an innovative effort or approach is not a failure of performance, but rather it is considered a healthy and important part of learning and growth within an organization.



## High Performance Culture/Engaged Workforce

Otterbein's Executive Leadership team recognized that to create a stronger workplace environment we needed sustained culture change and new practices. We selected Brand Integrity (BI) to help guide us. In 2017 we implemented the BI system through a 3-step process:

1. Define Core Values
2. Remind
3. Quantify

A random sample of partners was asked what they do when at their best. This yielded 21 core behaviors that all partners from the STNA to the CEO can and should do every day to meet/exceed customer (residents, elders, family, vendors and ourselves) needs and expectations. We defined this the Otterbein Experience (OE). (See attached)

We introduced the OE through training done by partners nominated by their leadership teams. The OE and expectations are now incorporated in new hire orientation.

We learned training is 1%, Reminding is 99%. Two primary ways we remind partners are:

1. One Minute Reminders
  - a. Leaders start EVERY meeting asking for an 'Otterbein Minute' –an opportunity for someone to share an example of a partner(s) doing a behaviors and why it was impactful.
2. Recognition Platform
  - a. BI provides a Facebook-type online system where ALL partners can recognize others through Posting, Commenting, Liking or Sharing a Recognition. This helps encourage a focus on customer and partner satisfaction. An example is:



## Staffing Super Hero!

*James Alfred recognized by Connie Green*

You earned a huge WOW from your Neighborhood!! During today's morning meeting we learned you have successfully filled 99.9% of the weekend schedule AND with you did this with Otterbein Partners. Thank you for your extra efforts as this is a huge accomplishment and our partners and elders appreciate your determination in getting the open positions filled. [See Less](#)



[Setting the Standard](#) [Partnering in Our Success](#) [Improves the work environment](#) [Increases customer satisfaction/loyalty](#)

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Holli Remy: James you have done a great job of filling all of our empty slots! Thank you! -Holli

May 17, 2019 [Like](#)



Sarah Thompson: You go James!! Very impressive!

May 17, 2019 [Like](#)

The manager of the partner receiving the recognition approves the recognition post. Thus the manager sees what their direct report is doing and can add a comment.

There are several ways Leadership focuses on improvement and innovation.

- We track how many recognitions are written and received. (See attached). Our goal is 100% of managers and 60% of hourly partners writing recognitions. We achieved 94% of managers and 30% of partners over the 2019 EOC period. Competition also is big at Otterbein so some sites are holding fun competitions to increase recognition.
- Another BI tool is a semi-annual survey, a step in Quantify. (See attached) The survey yields considerable information including an Engagement Index from -100 to +100. (See attached). Otterbein has consistently achieved the 3<sup>rd</sup> of 4 quadrants. To ensure a continual focus on improvement, Executive Leadership reviews results and determines an organization wide focus area. Results are shared with partners and their feedback is included in an action plan to celebrate results and address improvement areas.
- Operational tools include quarterly SOAR (Strategic Operational Analysis Review). The CEO/CFO/VP Operations meet with each site to review metrics and develop action plans for improvement; progress is reviewed in the next quarterly meeting.
- Ministry operations teams meet monthly to discuss specific areas and share best practices. Our LPCs also develop and review annual Work Plan Goals and Balanced Scorecard which addresses Customer Service, Finance, Process Expertise and Growth.

Executive Leadership recognizes that developing leaders is critical to partner engagement.

- Annually we update our Succession Plan and recommend partners for the LAO Leadership Academy. Over 60% of our graduates have been promoted or assumed increased responsibility in current role.
- Ongoing leadership development for Managers and Senior Leaders is through regular 1:1s with manager and formal training with on-the-job applications and regular reviews and coaching from your manager built in.
  - Partnered with Global Corporate Collage for a 3-year series for Managers: Leading at Otterbein, Communicating like a Leader and Coaching to Build Engagement.
  - We're in partnership with OSU Albers Enterprise for development of Home Office and Executive Directors and Guides (LNHA). This first year included pre/post 360 feedback, executive coaching and workshops. Aggregate 360 scores from their managers improved > 1 Standard deviation. We were recognized with their Visionary Strategic Leadership Development award.
  - Tools and concepts from both systems are included in our New-to-Otterbein Leadership training; a 2-day course that also includes a review of key HR policies and processes.

We ensure partners are updated on Otterbein and industry trends through chats and huddles with small groups of partners within a site. Also, the President/CEO, CFO, VPs of HR and Ops, meet annually across shifts at all sites. Information is shared about the 'State of Otterbein/Individual location' along with an open Q&A session. We also give each partner an index card to share feedback/concerns or answer a question such as, 'If I were CEO I would....'. This information is summarized and we look for Otterbein-wide trends that need to be addressed.



## **The Otterbein Experience**

### **Mindset: Together Enhancing Quality of Life**

#### **Delivering a Personalized Experience**

1. Anticipate customer\* needs and meet them.
2. Engage in activities and conversations that are meaningful to customers.
3. Respectfully interact with customers at their pace and level.
4. Create eye contact, smile, and greet people by name.
5. Take time to listen to and understand others.

#### **Partnering in Our Success**

6. Appreciate and acknowledge the contributions of others.
7. Help and support others within and across departments, locations, and services.
8. Follow up to ensure requests are addressed in a timely manner.
9. Be flexible and adapt to changes.

#### **Leading by Example**

10. Communicate in an open, honest, and respectful manner.
11. Do what you say you will do.
12. Speak up, respectfully sharing ideas and opinions.
13. Speak positively about Otterbein, each other, and our customers.

#### **Demonstrating Excellence**

14. Be on time and ready to work.
15. Ensure safety of self and others.
16. Identify opportunities for improvement and take action.
17. Take personal accountability for the quality of your work.
18. Be responsible in using resources.

#### **Sharing Our Knowledge and Expertise**

19. Understand what Otterbein does and share with others.
20. Continually seek to improve your skills and knowledge.
21. Proactively share knowledge and expertise to help others.

*\* Customers refers to residents, elders, patients, and family members.*

**Date Filter**

May 1 2017 - Apr 30 2...

**Group Filters**

GROUP TYPE: Location → All

MANAGER / NON-MANAGER: All

21 Groups Selected

**2,192 People Selected**

127 Managers

2,065 Non-managers

**Authors**

People who have written a recognition

**736 34%**

Managers	119	94%
Non-managers	617	30%

**Recipients**

People who have received a recognition

**1,682 77%**

Managers	122	96%
Non-managers	1,560	76%

**Authors, Recipients**

People who have written or received a recognition

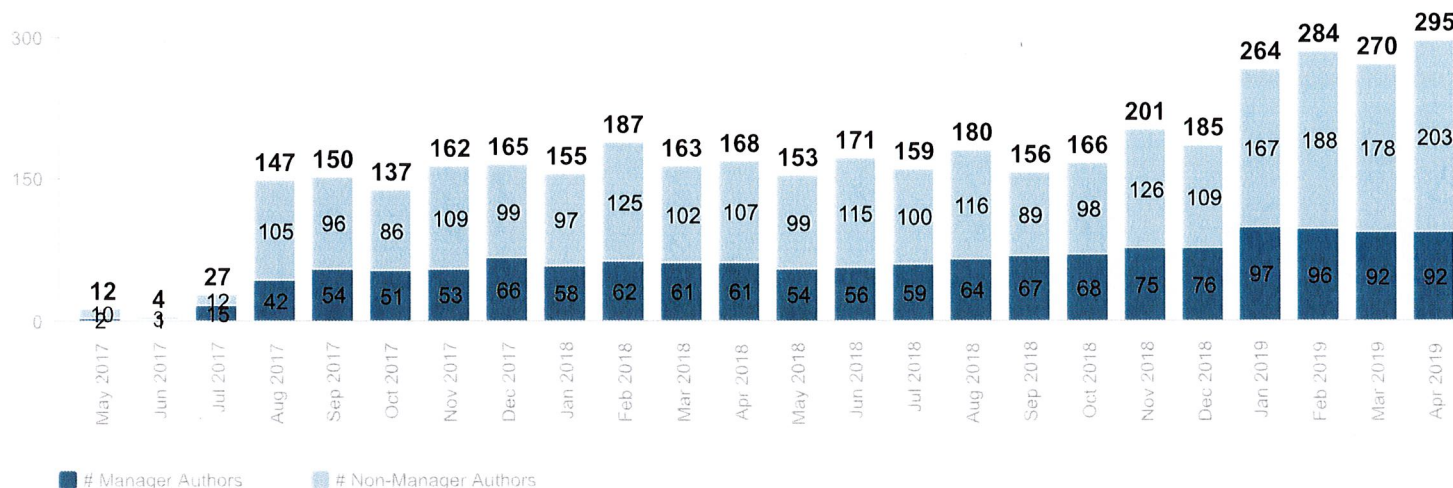
**1,693 77%**

**Recognitions Written**

**17,398**

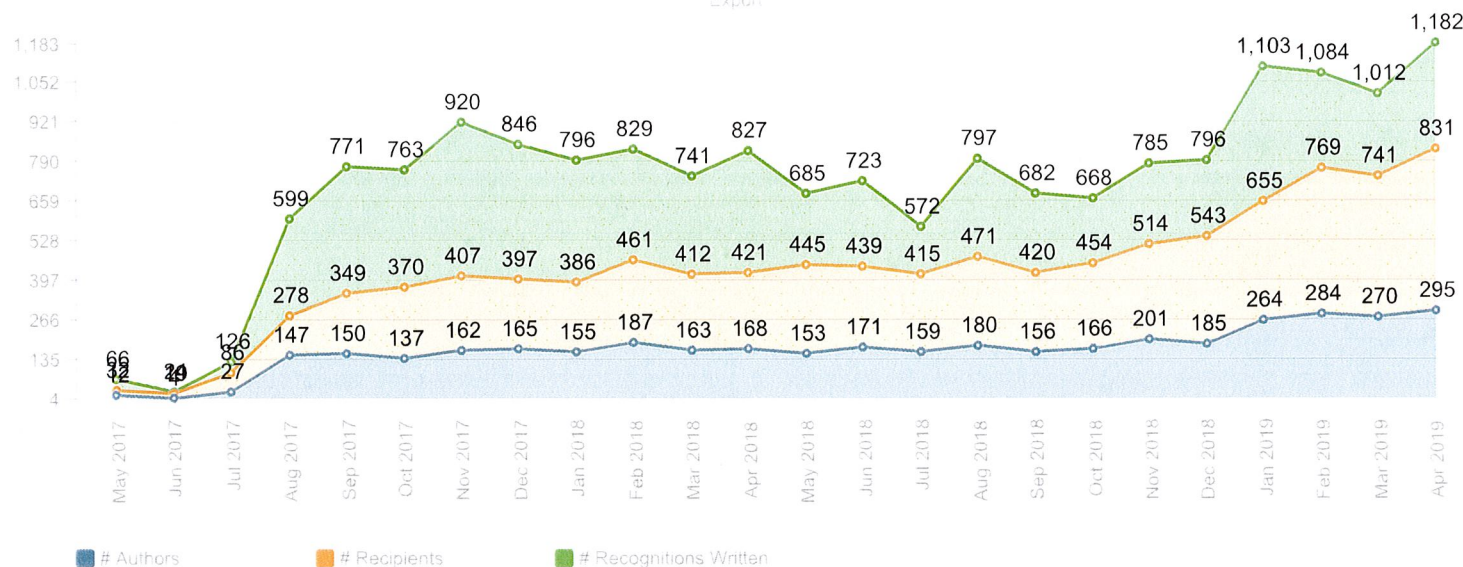
Number of Authors by Month

Export



Authors, Recipients, and Recognitions by Month

Export



All Behaviors

Behavior Category	Behavior	Average	% Change	Prev Rank	Chg from 1st
Delivering a Personalized Experience	Anticipate customer needs and meet them.	8.22	No chg	6	▲3%
	Engage in activities and conversations that are meaningful to customers.	8.24	No chg	5	▲2%
	Respectfully interact with customers at their pace and level.	8.37	No chg	3	▲1%
	Create eye contact, smile, and greet people by name.	8.58	No chg	2	No chg
	Take time to listen to and understand others.	8.32	No chg	4	No chg
Partnering in Our Success	Appreciate and acknowledge the contributions of others.	7.96	▼1%	8	▲2%
	Help and support others within and across departments, locations, and services.	7.93	No chg	11	▲2%
	Follow up to ensure requests are addressed in a timely manner.	7.84	No chg	14	▲2%
	Are flexible and adapt to changes.	7.66	▼1%	18	▲1%
Leading by Example	Communicate in an open, honest, and respectful manner.	7.84	▼1%	13	▲1%
	Do what they say they will do.	7.53	No chg	20	▲3%
	Speak up, respectfully sharing ideas and opinions.	7.73	▼1%	17	▲3%
	Speak positively about Otterbein, each other, and our customers.	7.46	▼1%	21	▼1%
Demonstrating Excellence	Are on time and ready to work.	8.16	No chg	7	▼1%
	Ensure safety of themselves and others.	8.54	▼1%	1	▼1%
	Identify opportunities for improvement and take action.	7.72	▼1%	15	▲2%
	Take personal accountability for the quality of their work.	7.58	▼1%	19	▲1%
	Are responsible in using resources (supplies, time, money).	7.84	▼1%	12	No chg
Sharing Our Knowledge and Expertise	Understand what Otterbein does and share with others.	7.89	▼2%	9	No chg
	Continually seek to improve their skills and knowledge.	7.73	▼1%	16	▲2%
	Proactively share knowledge and expertise to help others.	7.85	▼1%	10	No chg

Most Improved Behaviors Over Time

