

VALUES BASED CULTURE



TTU  HSC

FIELD GUIDE

2019

VISION

Texas Tech University Health Sciences Center will strengthen its national reputation as it seeks to promote healthier communities across West Texas and beyond.

MISSION

As a comprehensive health sciences center, our mission is to enrich the lives of others by educating students to become collaborative health care professionals, providing excellent patient care and advancing knowledge through innovative research.

VALUES

One Team | Kindhearted | Integrity

Visionary | Beyond Service

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A MESSAGE FROM THE **PRESIDENT**

Texas Tech University Health Sciences Center has made significant accomplishments since we began as one school on one campus almost 50 years ago. We have positioned our university as a leader in preparing health care professionals to meet the demands of the ever-challenging health care environment — whether that be in a classroom, clinic or lab.

During the spring of 2018, we held thematic workshops where I heard resoundingly from our students, faculty and staff that contentment is not in our character. We identified actions to move TTUHSC forward and to address a growing demand on universities to produce graduates skilled in integrative thinking and the ability to apply team-oriented approaches to addressing problems as well as provide educational experiences that include personal and ethical development.



*From now until **August 31, 2020**, we will concentrate our efforts on five strategic priorities*

– **ACADEMICS, RESEARCH, SERVICE & OUTREACH, PEOPLE and OPERATIONS** – that we believe will enhance TTUHSC’s value for all of its stakeholders – students, faculty, staff, patients, clinical partners, legislators, donors and our campus and managed care communities as a whole. Additionally, these priorities allow us to leverage recent changes in regard to organization, efficiency, productivity and professionalism within restructured areas of External Relations (Institutional Advancement and Communications & Marketing), Finance, Human Resources, Information Technology, Facilities and Safety Services.

For TTUHSC, this field guide is our playbook - our plan to build on our recognized strength and position as a leader in health-related higher education. A special thanks to those who helped shape its contents. I challenge each of us to use this field guide to achieve our strategic objectives. I look forward to celebrating our accomplishments along the way.

TEDD L. MITCHELL, M.D.
President

INTRODUCTION TO A

VALUES-BASED CULTURE

During the spring of 2018, we began our journey to create a sustainable, values-based culture. We held a Values Summit to clearly define our shared core values and desirable behaviors that will shape the culture of our team.

The values came from the collective hearts and minds of our team members. As President Mitchell said at the summit, “Ideally, we would have invited our 5,000 team members to attend. That wasn’t feasible.” We invited a diverse team of 104 people from all our campuses, schools and many of our managed care locations to ensure robust discussions. No one person knew everyone in the room.

Our values-based culture will create an environment with a defined purpose.

At the summit, there were two ground rules. Everyone participates and no one dominates. We collaborated and we debated. By the end of the summit, we left as one team, united in our goal to bring

a draft of our values and corresponding desirable behaviors to the entire TTUHSC team to review.

The next step in the journey was to conduct listening tours where we presented the draft of our values and behaviors the TTUHSC Team. We heard from over 2500 team members who gave us valuable feedback. In some cases, they validated the work of the summit team. In other cases, they provided clarification or enhanced the original draft. Today, we have the basis to build our values-based culture.

As we begin to integrate our values in our daily work, this field guide will serve as a tool to align our work with our strategic priorities, objectives and strategies.

Throughout this guide, we use the terms *leader* and *team member* – sometimes interchangeably. Being a team member at TTUHSC requires each of us to lead in the areas we are strong. We are all striving to be leaders in whatever position we hold. None of us are as strong and smart as all of us working together.

Now, the real work begins as we work together to integrate our values-based culture into all we do.



STEVE SOSLAND
Chief People Officer

OUR VALUES

From filling out paperwork for a work order to interacting with visitors or patients on campus, our principles drive everything we do. **These five values describe how we live out our vision and mission at TTUHSC.**



ONE TEAM

Unite and include diverse perspectives to achieve our mission

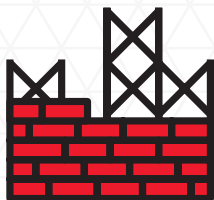
- Empower and energize one another to create positive growth
- Collaborate through open communication
- Hold ourselves and each other accountable by giving and accepting constructive feedback
- Foster a fun and healthy environment that encourages team spirit
- Recognize & celebrate contributions & achievements



KINDHEARTED

Exceed expectations with a kind heart, helping hands and a positive attitude

- Assume good intentions
- Listen first to understand
- Treat all consistently with compassion, respect and an open mind
- Acknowledge each other with courtesy
- Respond rather than react



INTEGRITY

Be honorable and trustworthy even when no one is looking

- Be honest regardless of the outcome
- Make ethical choices in every situation
- Honor commitments
- Be transparent in your purpose, expectations and actions
- Protect and conserve institutional resources



VISIONARY

Nurture innovative ideas, bold explorations and a pioneering spirit

- Promote an innovative environment that embraces appropriate risk
- Be resilient and confident when faced with challenges
- Inspire continuous curiosity
- Demonstrate commitment to life long learning and personal development



BEYOND SERVICE

Create and deliver positive defining moments

- Anticipate the needs of each individual and respond with a generous heart
- Invest in the well-being, safety and success of all by going the extra mile
- Be solution-oriented; create the pathway to a win-win resolution
- Deliver excellence in all we do

STRATEGIC PRIORITIES

Our strategic priorities serve as our playbook to guide our work until August 31, 2020. Our mandate is that we will accomplish these objectives. Each of us must do our part. The quarterly coaching plan in the back of this field guide links our individual goals to these priorities.

1

ACADEMICS

Strategic Goal

Provide innovative educational programs that prepare students to be competent and caring health care professionals and researchers.

Objective:

Promote innovative approaches in teaching and learning

Strategies

- Provide resource toolkit and annual workshops for faculty who teach online courses
- Integrate instructional technologies (hardware and software) through close consultation with teaching faculty
- Explore development of competency-based education programs
- Implement best practices in instructional design for greater academic success and faculty development

Objective:

Provide meaningful interprofessional education experiences

Strategies:

- Encourage teaching faculty to participate in interprofessional education experience and preceptor training
- Coordinate interprofessional education experiences across all TTUHSC schools and campuses to align activities in commonly scheduled times

Objective:

Enhance personal and professional development of students

Strategies:

- Develop quality enhancement plan to promote student wellness and development
- Improve coordination of the university's co-curricular activities that enhance personal and professional development
- Develop student resource centers to enhance library-based services

2

RESEARCH

Strategic Goal

Advance our research portfolio with emphasis on areas of strength and collaboration.

Objective:

Develop infrastructure plan that maximizes resources and increases collaboration of research and scholarly activity in areas of strength

Strategies

- Develop database system to share information related to research and scholarly activities at TTUHSC
- Enhance operations within the Office of Research to streamline the administration process for obtaining funding as well as to create efficient systems critical for research and scholarly activities
- Identify clusters of research strength among faculty whose capacity and research align and develop research opportunities around these areas

Objective:

Explore novel funding opportunities and other activities to increase research and enhance TTUHSC's visibility and reputation

Strategies

- Optimize our relationship with Texas Tech University to gain commercialization and novel funding through utilization of the Innovation HUB at Research Park
- Identify and share with faculty funding opportunities that reach beyond traditional sources to include a broad pool of federal agencies, private foundations, corporate partners, and private philanthropists
- Enhance internal and external communication, including printed, web-based, and other marketing materials that effectively display TTUHSC's research activities and capabilities around these areas

3

SERVICE & OUTREACH

Strategic Goal

Improve overall health and access to health care for communities in our region through the provision of patient care services and community outreach.

Objective:

Leverage our unique position as a comprehensive academic health care center to provide a collaborative and positive patient experience

Strategies

- Develop campus-wide wayfinding plan and implement effective and easily understood methods to navigate our facilities
- Create communication structure that better supports referrals amongst TTUHSC healthcare providers
- Define methods to meet healthcare needs of TTUHSC employees

Objective:

Make positive impacts through service, outreach and interest driven by community needs and TTUHSC expertise

Strategies

- Expand “Red Bag” tours for high school students to include all university campuses
- Enhance engagements and collaborations with community stakeholders to develop pipeline of individuals interested in pursuing health career paths and TTUHSC educational opportunities
- Create focused marketing plan to promote the TTUHSC brand and services
- Continue development of Texas Tech Mental Health Institute in conjunction with Texas Tech University

Objective:

Integrate telemedicine/telehealth into our service offerings to enhance our reputation as a leader in telemedicine/telehealth

Strategies

- Develop task force to inventory all telemedicine/telehealth capabilities and explore collaborations within TTUHSC to implement telemedicine/telehealth applications into our clinical service offerings
- Identify opportunities to incorporate telemedicine/telehealth into student curriculum through training offered by the Frontiers in Telemedicine program
- Explore opportunities for synergies in telemedicine/telehealth capabilities with other state agencies

4

PEOPLE

Strategic Goal

Create a sustainable, values-based culture.

Objective:

Identify and integrate values which forge our identity

Strategies

- Identify organizational core values shared by diverse members of the TTUHSC university community and integrate values into the culture of the university

Objective:

Invest in people growth and development to become the employer of choice in each of TTUHSC's markets

Strategies

- Implement effective and efficient recruitment and retention process that empowers departments to establish and maintain a competent workforce aligned with our values.
- Develop faculty and staff compensation plans designed to recruit, retain and reward high performing members of our community who share our values.
- Redesign evaluation process that allows effective and prompt feedback to further develop and enhance employee performance



Sustainability

Organizations don't create sustainable cultures.

People do. Sustainability occurs when the majority of the team members commit to living a life of shared values and influencing others around them to do the same. *It's up to us as a team.*

5

OPERATIONS

Strategic Goal

Ensure operations and infrastructure effectively and efficiently support the mission of the institution.

Objective:

Improve operational infrastructure to better meet the unique academic, service, research and business needs of our campuses and sites

Strategies

- Review business processes to ensure flexibility, efficiency and effectiveness that allow decisions to be made by knowledgeable, empowered and engaged team members
- Institute a broad facilities plan that meets the needs of our community in line with the university's mission
- Balance IT security with the ability to perform functions effectively for all constituents
- Strengthen academic and student support services that promote student success across the institution
- Review and evaluate regional campus administration structure
- Conduct annual budget hearings to implement consistent and predictable allocation of financial resources

Objective:

Work collaboratively with key stakeholders to accomplish the mission of the institution

Strategies

- Conduct effective stakeholder engagement activities that complement TTUHSC's strategic plan and provide greater exposure for the TTUHSC brand
- Enrich branding campaign to increase consumer engagement through functional, intentional and consistent efforts that utilize social media platforms

DNA OF A

VALUES-BASED CULTURE



DNA is defined as “the fundamental characteristics or qualities of someone or something.”

A love of learning is a characteristic shared by those attracted to careers in higher education and health care. It’s in our DNA. Our Visionary value inspires us to demonstrate commitment to life-long learning and personal development.

We developed this section of the field guide for those who share this passion. It contains information from multiple sources we can use to live our values, enhance individual accomplishments and reach organizational objectives.

VALUES-PERFORMANCE MATRIX ▲

CRUCIBLE MOMENTS ▲

BUILDING TRUST ▲

COURAGE ▲

CRITICAL CONVERSATIONS ▲

ACCOUNTABILITY ▲

MENTORING ▲

COACHING ▲

“When the student is ready the teacher will appear.”

– Buddhist Proverb

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER **VALUES - PERFORMANCE MATRIX**

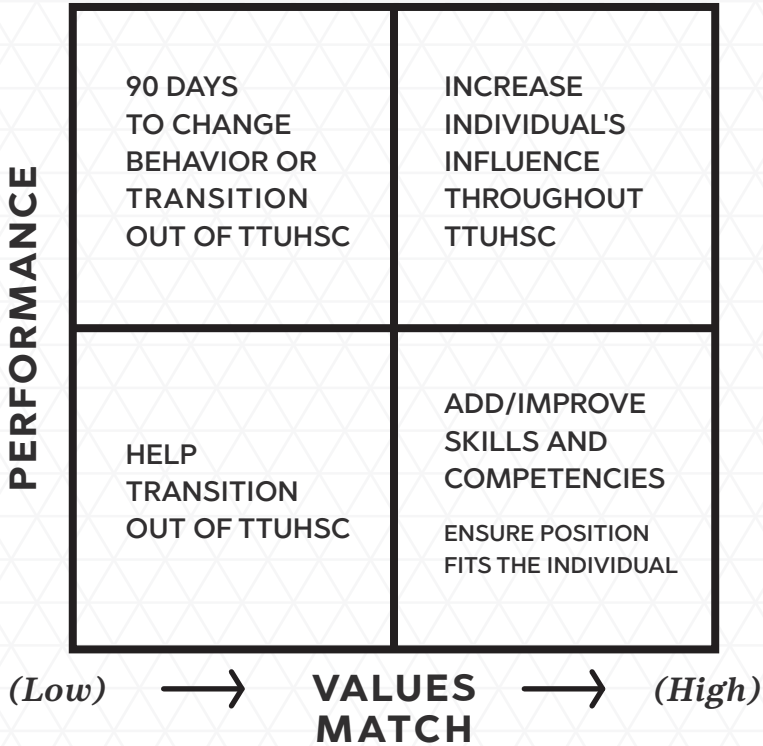
Historically, success was measured purely by competencies set forth in the annual performance evaluation. As we move towards a values-based culture, we are adding a new dimension to how we evaluate ourselves.

The following tool, originally developed by Jack Welch at General Electric, allows us to measure ourselves in two dimensions: values and performance. The matrix contains four quadrants based on how we choose to live our values and on our individual performance. Each one of us falls into one of four quadrants.

STEPS

1. Begin with you as an individual. Start by identifying where you currently fit in the matrix for values and performance. (Refer to Values - Performance Matrix Exercise.)
2. Meet with your supervisor to examine where the two of you think you fall in the matrix.
3. Determine your appropriate development plan. (Refer to Development Action Plan on *page 24*.)

(High)



**VALUES - PERFORMANCE MATRIX
EXERCISE**

DEVELOPMENT ACTION PLAN

Supervisor Name: _____

1. Rate the individual based on alignment with our values.

Scoring: Aligned = 2 Inconsistent = 1 Not Aligned = 0

VALUES

1. One Team Aligned Inconsistent Not Aligned
2. Kindhearted Aligned Inconsistent Not Aligned
3. Integrity Aligned Inconsistent Not Aligned
4. Visionary Aligned Inconsistent Not Aligned
5. Beyond Service Aligned Inconsistent Not Aligned

Total Values Score: _____

2. Select five critical competencies for the position or use the example below.

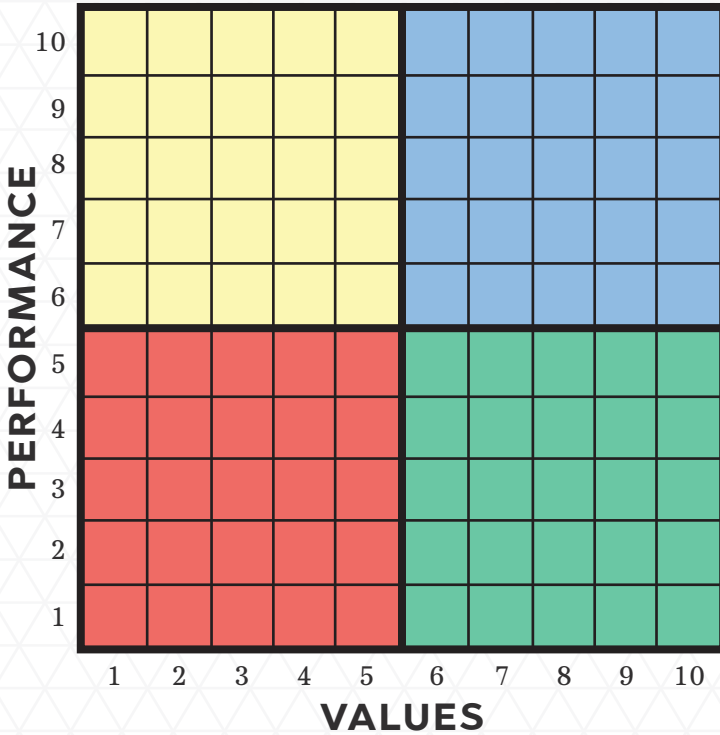
Scoring: Strength = 2 Inconsistent = 1 Not Performing = 0





PERFORMANCE

1. Initiative Strength Inconsistent Not Performing
2. Project Management Strength Inconsistent Not Performing
3. Financial Management Strength Inconsistent Not Performing
4. Accountability Strength Inconsistent Not Performing
5. Reliability Strength Inconsistent Not Performing

Total Performance Score: _____

3. Place a dot in the square where the Values and Performance scores meet.



-  High Values / High Performer
-  High Values / Low Performer
-  Low Values / High Performer
-  Low Values / Low Performer

Use notes section on page 56, as needed.

CRUCIBLE MOMENTS

*A **crucible moment** is a singular transformative experience that tests a person's commitment to their core values and can change the course of a person's life. These occur when we make a critical mistake or behave in a way that has the potential to cause great harm to ourselves and others.*

While we may try to avoid them, most of us will have high-pressure, crucible moments like this. When we encounter them, we have an opportunity to transform a negative experience into rare and profound growth. The test of one's character is in how we choose to respond. Our choice will contribute to our reputation and ability to transform ourselves into someone stronger and more capable of handling even tougher challenges. Or not.

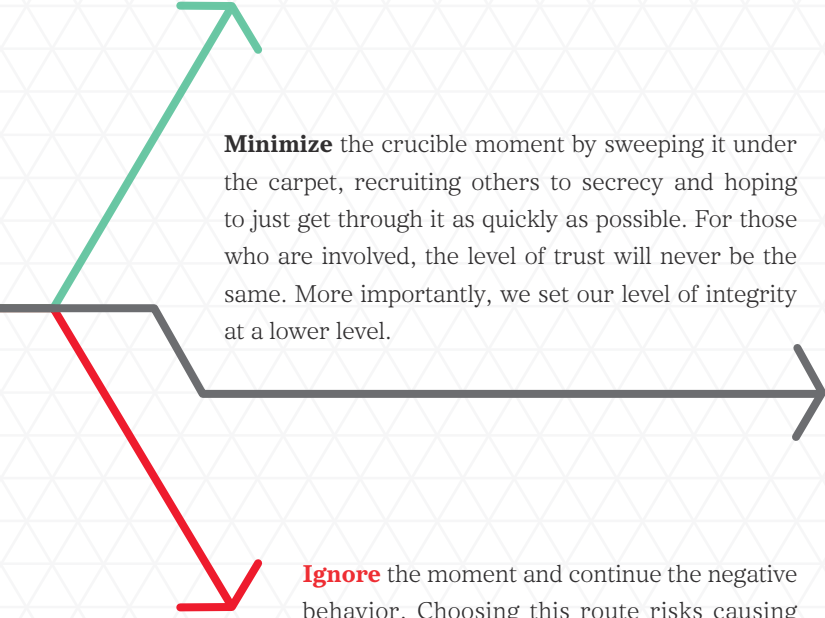
**IN CONFRONTING A CRUCIBLE MOMENT,
EACH OF US HAS THREE CHOICES:**

1. Ignore 2. Minimize 3. Confront

“Crucibles force people into deep self-reflection, where they examine their values, question their assumptions and hone their judgment.” – Warren Bennis

Adopted from "Crucibles of Leadership" by Robert J. Thomas

Confront the moment with courage and the willingness to undergo the scrutiny of intense heat and pressure. When we recognize our poor behavior, publicly admit it, and choose to move in a positive direction, we seize the opportunity to create meaning from hardship and develop the tools to learn and to lead.



Minimize the crucible moment by sweeping it under the carpet, recruiting others to secrecy and hoping to just get through it as quickly as possible. For those who are involved, the level of trust will never be the same. More importantly, we set our level of integrity at a lower level.

Ignore the moment and continue the negative behavior. Choosing this route risks causing more harm to self and others. It will eventually cause us to spiral out of control and fall beyond the point of recovery.

BUILDING TRUST

What is the key to working through a crucible moment, coming out stronger and having built a higher degree of trust with those around us? In his book, "The Speed of Trust," Stephen M.R. Covey lists 13 behaviors of a high-trust leader. The following chart serves as a road map for trust building.

Behaviors	What to Say
Talk Straight	Be honest. Tell the truth. Let people know where you stand.
Demonstrate Respect	Care for others and show it. Treat everyone with respect, especially those who can't do anything for you.
Create Transparency	Tell the truth, be real, genuine, open and authentic.
Right Wrongs	Admit when you're wrong, apologize quickly, show humility, don't let pride get in the way of doing the right thing.
Show Loyalty	Give credit to others, speak about people as if they're present and represent others who aren't there.
Deliver Results	Establish a track record of getting the right things done. Make things happen, on-time and within budget. As Yoda says, "Do or do not, there is no try."
Get Better	Continuously improve. Increase your capabilities. Be a constant learner. Don't consider yourself above feedback.
Confront Reality	Tackle all issues head-on, even the "undiscussables." Address the tough stuff directly. Confront the reality, not the person.
Clarify Expectations	Disclose, reveal and validate expectations. Don't assume they're clear or shared. Renegotiate if needed/possible.
Practice Accountability	Hold yourself accountable first, others second. Take responsibility. Be clear on how you'll communicate how you're doing and how others are doing. Don't blame.
Listen First	Listen before speaking. Understand, diagnose, listen with ears, eyes and heart.
Keep Commitments	Say what you'll do, then do it. Make commitments carefully and keep them at all costs. Don't break confidences.
Extend Trust	Extend trust abundantly to those who've earned it, conditionally to those who are still earning it.

TOP THREE TAKEAWAYS

- *Listen first to understand*
- *Be transparent in our purpose, expectations and actions*
- *Hold ourselves and each other accountable*

Opposite	Counterfeit
Lie. Deceive.	“Spinning,” positioning, posturing and manipulating.
Show disrespect or not care about others.	Faking respect, showing respect for some but not all.
Hide, cover up, obscure things.	Having hidden agendas, withholding information.
Deny, justify or rationalize wrongful behavior.	Cover up, disguise, hide mistakes until forced to admit error.
Take credit, betray others.	Being gossipy and two-faced, appearing to give credit when they’re present but downplaying their contribution and taking credit when they’re not around.
Overpromise & under-deliver.	Delivering activities instead of results - doing busywork without accomplishing anything real.
Rest on your laurels, become irrelevant.	Learning but never producing, force-fitting things into what you’re good at.
Ignore reality, be in denial.	Focus on side issues while skirting the real issues.
Leave expectations unclear or undefined.	Guessing. Fail to pin down specifics for meaningful accountability.
Not take responsibility.	Point fingers and blame others, fail to enforce consequences when expectations aren’t met.
Speak first and listen last or not listen at all.	Listen just to formulate your response, pretend to listen.
Break commitments, violate promises.	Make vague, elusive promises that can’t be pinned down.
Withhold trust.	Extend false trust - giving responsibility without authority, then micromanage, “snoopervise” and hover.

COURAGE

Working in a values-based culture requires us to abandon our fears: fear of retaliation, retribution, disappointment and failure. Living our TTUHSC values requires courage to break away from the status quo and boldly test new ideas.

Author Brené Brown writes about the combination of displaying courage, being vulnerable and building trust in her book, *Daring Greatly*. She says, “I want to be in the arena. I want to be brave with my life. And when we make the choice to dare greatly, we sign up to get our asses kicked. We can choose courage or we can choose comfort, but we can’t have both. Not at the same time. Vulnerability is not winning or losing; it’s having the courage to show up and be seen when we have no control over the outcome.”

In this arena of health care, it takes tremendous courage to face our risks – a new patient procedure, research protocol, clinical rotations every July, technological advances and other innovations. “There is no effort without error and shortcoming.” We must nurture innovative ideas and bold exploration with a pioneering spirit.

TOP THREE TAKEAWAYS

- *Challenge the status quo*
- *Transparency = courage to be authentic and vulnerable*
- *Hold ourselves and others accountable for values and results*



“Courage is not the absence of fear, but rather the judgment that something else is more important than one’s fear.”

– Ambrose Redmoon

CRITICAL CONVERSATIONS

One of the most critical skills we can each develop in order to reach our strategic objectives is the capability to conduct crucial conversations. According to author Kerry Patterson, in his book "Crucial Conversations," the nature of a conversation is crucial when it meets the following criteria:



Examples of crucial conversations include delivering bad news, giving constructive feedback, confronting a behavioral issue and loss of trust.

We each have three options when faced with negative behaviors from another:

1. **Accept the negative behavior** – do nothing.
2. **Change our environment** – leave the team or help the other person leave.
3. **Confront the behavior** – partner with the other person and work together towards the change we want to see.

THERE ARE SEVEN STEPS TO CRITICAL CONVERSATIONS:

1. *Identify* the purpose.
2. *Compose* the message.
3. *Deliver* the message.
4. *Listen* to understand.
5. *Create* the pathway to a win-win resolution.
6. *Determine* time frame and deadlines.
7. *Provide* on-going feedback and support.

Typical Conversation:

"Steve, you need to deliver better results and you need to get your work done on time. Nobody on the team trusts you."

Preferred Conversation:

"Steve, you know we are creating a values-based culture at TTUHSC. I am concerned that you are losing trust with our team. When you make commitments and then fail to deliver results in the timeline we agreed upon, you cause other team members to pick up your slack and work outside of their strengths and priorities. I really want to listen to you and understand the barriers in your way of honoring your commitments. By the end of this meeting I want us to create a win-win resolution."

TAKEAWAY

Critical conversations should be delivered with sensitivity and clarity

ACCOUNTABILITY

Accountability is to willingly accept the full responsibility of one's actions, behaviors, obligations and commitments. It is the conduit between activity and quality results.

When we start working on a great idea and do not hold ourselves accountable, we run the risk of creating a flavor-of-the-month mentality.

We practice accountability in four ways:

- Hold myself accountable
- Allow others to hold me accountable
- Hold others accountable
- Recognize others who hold themselves accountable

"It is wrong and immoral to seek to escape the consequences of one's acts." – Mahatma Gandhi



Power of the Pin

This pin is a reminder of the values we are striving to fulfill as a member of the TTUHSC team.

Sometimes we feel we are the only ones doing our part and wonder if anyone else is living our values. Every day, fellow TTUHSC team members face challenges that make it tough to live our values. Seeing the pin may be just the thing they need to understand they are not alone and have someone willing to help them.

When I choose to wear this pin, I am showing my commitment to live our values: **One Team, Visionary, Beyond Service, Kindhearted, Integrity.**

MENTORING VS.

MENTORING is a fundamental form of human development where one person invests time, energy and personal know-how in assisting the growth and ability of another person.

Mentoring has a critical role at TTUHSC. Experienced faculty members mentor junior faculty on career development. Others may seek a professional or personal mentor to help them grow and develop. The mentor is a wise and trusted counselor who provides guidance, encouragement and support. Mentors teach from their own experience.

ROLE OF A MENTOR:

- Helps to shape individuals' beliefs and values in a positive way
- Provides a long-term relationship from someone who has 'done it before'
- Imparts wisdom from their own bank of knowledge & experience
- Gives advice on career planning
- Helps navigate the politics of the organization

COACHING

COACHING is partnering with team members in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. It assumes the individual team member has the knowledge and capability to solve their own problem. If coaching is needed, there is a barrier preventing improvement.

COACHING – WHAT IT'S NOT: Some leaders confuse professional coaching with that found on a sports field. Coaching is not the one-way directive correction of someone's behavior or performance. It is not telling someone what you want done.

ROLE OF A COACH:

- Partners with individuals to develop and grow capacity
- Assists individuals to improve awareness, set and achieve goals or enhance a particular behavior
- Provides individuals with solution-focused problem solving
- Uses powerful questions to create awareness and evoke learning
- Allows individuals to create their own solutions

POWERFUL COACHING QUESTIONS

Effective coaches develop the ability to ask questions that reveal the information needed for maximum benefit to the coaching relationship and active listening skills to understand the team member's perspective. Coaches ask open-ended questions that:

1. **Evoke discovery**, insight, commitment or action
(those that challenge assumptions)
 2. **Create greater clarity**, possibility or new learning
 3. **Move the team member** toward what they desire
-

COACHING SESSIONS

We've divided the 11 International Coach Federation (ICF) competencies among three phases and listed potential questions to use in your sessions. You can use these examples or develop your own. The key is to ask questions beginning with "what" or "how."

Avoid yes or no questions. They shut down conversation. Avoid "why" questions that cause others to be defensive.

Phase One - Setting the Foundation

ICF COMPETENCIES:

- Meet ethical guidelines and professional standards
- Establish the coaching agreement
- Create trust and a safe environment
- Maintain coaching presence - be mentally present and engaged

QUESTIONS:

- What is your desired outcome or goal for today's conversation?
- How will this help you with the current challenges you are facing?
- How will you know if you have achieved your goal?
- How will you measure success?

Phase Two - Creating Awareness

ICF COMPETENCIES:

- Listen actively
- Ask powerful questions
- Communicate directly
- Create awareness

QUESTIONS:

- What's important to you about that outcome or result?
- What have you tried so far?
- Tell me more.
- What will change if you achieve this goal?
- When have you been successful in a similar situation in the past?
- What did you do to make it successful?
- What strengths can you utilize in making this change?
- What's the current situation?
- What is in your control?
- If you could start over again, what would you do differently?
- What's the benefit of taking action?
- What's the cost of not taking action?
- What barriers stand in your way?
- What else?
- Imagine you had no barriers. What would that look like?
- What changes are needed to move forward?
- What specific events led you to that conclusion?
- Think of someone you respect. How would she/he handle this situation?

Phase Three - Establishing Action Plan and Accountability

ICF COMPETENCIES:

- Design actions
- Plan and set goals
- Manage progress and accountability

QUESTIONS:

- Based on what we have been discussing, what are your next steps towards achieving your goal?
- What are the possible outcomes?
- What are your options moving forward?
- What haven't you considered that might have an impact?
- What is your plan?
- What actions will you take? By when?
- What information do you need to move forward?
- What is a first step you can take?
- How will you know that you've succeeded?
- What resources do you need?
- How can I support you with your plan?
- Who do you have to support you?
- How will you hold yourself accountable?
- How will this help you with the current challenges you are facing?
- How will you know if you have achieved your goal?
- How will you measure success?

Phase Four - Follow-Up Conversation

- How is your plan going? What's working?
- What have you learned so far?
- What are the obstacles in your way?

PROGRESS REVIEW SESSION II

Complete 30-90 days following quarter two coaching plan meeting.

1. How is your plan going? What's working?

2. What have you learned so far?

3. What are the obstacles in your way?

Employee Initials

Supervisor Initials

Date

PROGRESS REVIEW SESSION III

Complete 30-90 days following quarter three coaching plan meeting.

1. How is your plan going? What's working?

2. What have you learned so far?

3. What are the obstacles in your way?

Employee Initials

Supervisor Initials

Date

PROGRESS REVIEW SESSION IV

Complete 30-90 days following quarter four coaching plan meeting.

1. How is your plan going? What's working?

2. What have you learned so far?

3. What are the obstacles in your way?

Employee Initials

Supervisor Initials

Date

ACKNOWLEDGMENTS

We live our value of One Team when we collaborate through open communication. This field guide is the result of many hours of open communication and collaboration.

Will Watson is the creative genius who designed, created and laid out the content in a way we can all use in our daily work. Whenever there was a conflict of ideas, we learned to trust Will's instincts. He lives our value of Beyond Service by delivering excellence in all he does.

Jordan Pape, our professional writer has the amazing ability of taking my raw ideas and superfluous rhetoric and translating them into words and phrases with meaning. She is Kindhearted and always listens first to understand.

Ashley Hamm & Gabriel "Junior" Jimenez provided the leadership to our team to ensure we met deadlines and created content to align our strategy, values and individual coaching. They consistently demonstrated our value of One Team by fostering an environment that encouraged team spirit. Ashley is my role model at holding herself and others accountable by giving and accepting constructive feedback in a Kindhearted manner.

Kendra Burris invested in the well-being and success of all who participated in this project and always goes the extra mile. Her leadership inspires us to deliver Beyond Service.

Gary Little & MariAna Moyers adapted Jack Welch's values-performance matrix and created a tool for us to hold ourselves and others accountable by giving and receiving constructive feedback. They are a great example of One Team.

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Tedd Mitchell demonstrated Integrity by being transparent in his purpose, expectations and actions. He is our best example of our Visionary value by promoting an environment that embraces appropriate risk. He gave us his vision then turned us loose to create a meaningful tool.

I sincerely thank all our collaborators who went above and beyond to create this guide – Steve Sosland

SOURCES

This field guide contains information from thought leaders of a wide variety of topics. As part of our commitment to life-long learning and personal development, I encourage you to read the source documents for topics of interest to you.

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