EMPLOYEE FORUMS

This toolkit is designed to explain “Employee Forums”...what they are and how they work. It covers:

WHAT ARE THEY?
WHY HAVE THEM?
HOW DOES IT WORK?
PUTTING IT ALL TOGETHER
RESOURCES

1. WHAT ARE THEY?

Employee Forums are quarterly employee meetings led by senior leaders. The Employer of Choice team helps set up and coordinate these sessions.

2. WHY HAVE THEM?

These quarterly sessions, attended by all employees, are one of the best ways to communicate consistent messages across the organization. In fact, the CEO should do 75 percent of the speaking at these sessions. They are designed to not just be “information sharing,” but also fun and engaging as well.

Employee Forums allow your organization to:

- Focus employees and leaders on the goals and pillars of the organization – Service, Quality, Financial, People, and Growth.
- Share organizational information from the top.
- Bring closure to things that have been accomplished in the past quarter.
- Outline what will be happening over the next 90 days.
- Take the temperature of the organization.
- Reward and recognize employees.
3. HOW DOES IT ALL WORK?

There are **three phases** to an Employee Forum:

**ONE:** Planning, which includes developing a theme and an agenda built around the pillars.

**TWO:** Implementing, during which the forum is presented (possibly in several rollouts to accommodate the schedules of all employees).

**THREE:** Evaluating, after which the information is tabulated and provided to senior leaders.

**ONE: Planning**

- Choose a theme (or if not a theme, a key concept for the meeting). *For example: Baseball might be used to symbolize teamwork. The format might be “A League of our Own” for rolling out mission, vision, values. (Wear baseball uniforms, play music, show video such as “Wild Thing” video clip when he’s stepping up to the plate and under a lot of pressure. Props: Leather Jacket, sunglasses, baseball shirt, baseball hat, baseball glove.)*

- Remember that moving people out of their comfort zone promotes openness.

- Connect to purpose, possibly by sharing a letter from staff touched by a thank you letter or patient letter. Look for letters that name several people or departments, which will emphasize that we all achieve this together.

- **Anticipate questions.** While you want to answer questions, open time for spontaneous questions can lead to spotlighting one
person’s agenda and get the whole group off track. It is best to answer questions before and after the session, so you will want to include this in the planning phase. The first step in this process is to collect questions. Collect from at least two sources:

- Prior to sessions, send an email to all leaders asking them what questions they are hearing from staff. (Give the staff the opportunity to submit questions prior to event via drop boxes.)
- Review the status of those questions that were submitted after the last forum. Resolve or update those issues that are still outstanding and include those actions in your “q and a” communication.

Review these questions and triage for the most common ones; provide answers for these as part of the forum presentation. At the forum, assure employees that all questions will be answered. (The CEO will want to delegate many of these questions to the appropriate leader for a response.) Make the answers available either in writing and let staff take copies of the answered questions with them after the session, or publish an organization-wide newsletter that lists all questions as well as the responses. You may also give all the questions and answers to leaders to post.

In summary: keep some questions in forum to answer. Let staff know where to get other answers as mentioned above. Also remind the group that there is place for questions in forum survey and answers will be sent to leaders to share or answers will be published. Do not open the floor of the forum for spontaneous questions. This assures employees that all questions will be answered while preventing one disgruntled employee from monopolizing the gathering. Soliciting questions before the meeting enables the employees to be more thoughtful and the leaders to be prepared, while at the same time allowing the CEO and leaders to identify how many people share a concern.

- Align agenda to pillars as well as the theme. Put something on the back of agenda, such as “key points of forum.” The agenda for the Employee Forum is built around the Five Pillars of Excellence – Service, Quality, Financial, People, and Growth – and stays the same for each forum. Only the topics under each pillar change as needed to meet the needs of the organization.
There are direct benefits in dividing the agenda into the five areas and talking directly about the issues. This method:

- Provides consistency in moving the organization.
- Allows the employee to see that the organization is moving in a correct direction.
- Aligns and coordinates desired behaviors.
- Recollects wins for the organization by updating employees on things that the organization is already doing.
- Creates a well-rounded leader and organization.

Sample agenda items aligned under the Five Pillars of Excellence would be as follows:

**People:** Employee satisfaction, turnover, performance evaluations, bright ideas (example, bright idea slide with employee’s name and what the outcome was, i.e. “Changed blood glucose monitor, savings $15,000 year, John Smith” or “Added an extra station in outpatient phlebotomy, decrease TAT 15 minutes, Sally Jones.”)

**Service:** Patient satisfaction, physician satisfaction, benchmarking.

**Quality:** Bedsores, medication errors, Medicare LOS, JCAHO.

**Cost:** Productivity, whatever organization has identified as its goal, operating income, Balanced Budget Act.

**Growth:** Market share, health screens, new service development.
TWO: Implementing

- Have a leader session **first**: The first Employee Forum session should be conducted for leaders only. The agenda is the same as for the Employee Forums, but the forum is usually scheduled for a half hour longer than the other sessions to allow for question and answer. This session ends with key points for the leaders to address in their departments. This leader session allows senior leadership to:
  - Educate the leadership team on information to be presented to the employees.
  - Promote ownership by allowing leaders a first-hand opportunity to provide input and feedback to help improve the sessions for their employees.
  - Prepare leaders to reinforce the information and answer questions after the employees return from the forums.
  - Allow the leaders to know specifically what they need to do back in their departments.
• Track attendance. This should include capturing supervisor’s name. This allows you to track which supervisors are getting employees to the meetings. (Other identifiers are harder to get, such as dept number, employee number.) You can also count number employee buttons distributed.

• Don’t forget logistics: Buttons, posters or room decorations, door prizes, and staffing, such as people at door to hand out buttons and tickets. Build in the theme, such as having employees involved dressed in baseball shirts and hats.

• Create fun: One of the goals of holding employee forums is to “have fun,” allowing the employees to leave well informed and energized as well. Be creative and plan the event around a theme, using fun ideas, costumes, role-plays, music, door prizes, and decorations. The following is an example of how one Employee Forum was structured to create a creative learning environment.

• Theme:
  To Infinity and Beyond!

• Focus:
• Continuation of Journey – Not Changing Directions
• Service, Quality, Financial, People, and Growth still remain in focus.

• Key Agenda Item:
  Balanced Budget Act

• Fun Ideas:
• T-Shirts: Space Theme
• Space decorations
• Snacks: Moon Pies
• Music: Space Odyssey
• Decorations: Hospital Space Ship
- **Scheduling:** Schedule an adequate number of Employee Forum sessions to meet the needs of all employees on all shifts. For example, for a 300-bed hospital with 1,700 employees, 22 forums split across multiple shifts on multiple days might be scheduled to achieve maximum attendance.

  - Set a goal for all leaders to have all their employees attend.
  - Give the schedule to leaders well in advance of the sessions so all employees can be scheduled to participate.
  - Managers are expected to work for and fill in for the employees so they have the time to attend.
  - Schedule special sessions for your leadership team and your volunteers.

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<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
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<td>3 p.m.*</td>
<td>7 a.m.</td>
<td>9:30 a.m.</td>
<td>7:30 a.m.</td>
<td>1 a.m.</td>
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<td></td>
<td></td>
<td>Session for Leaders</td>
<td>6 p.m.</td>
<td>4 p.m.</td>
<td>5 p.m.</td>
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<td>11 a.m.*</td>
<td>10 a.m.</td>
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<tr>
<td></td>
<td></td>
<td>Session for Volunteers</td>
<td>7:30 p.m.</td>
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<td></td>
<td></td>
<td>7 p.m.</td>
<td>7:30 a.m.</td>
<td>7:30 am*</td>
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<td>8 a.m.</td>
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<td></td>
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<td>9:30 a.m.</td>
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<td>1 p.m.</td>
<td>Noon</td>
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</table>
THREE: Evaluating

Evaluations are important. The Employee Forums provide an excellent opportunity to take the temperature of your organization four times a year! Create a “mini-employee satisfaction survey” by choosing four to five key questions from your standardized employee satisfaction survey and place these questions on the Employee Forum evaluation. Used effectively, the information gathered from the evaluation can provide senior leaders with employee areas of concern, critical information regarding the culture, and questions that still need to be communicated further. This information will allow you to track/trend employee satisfaction throughout the year and to respond effectively. Remember to:

- Keep the questions chosen for the survey consistent from forum to forum to allow for comparable results and data trends.
- Prepare and calculate the data internally.
- Review the information with the senior leaders.
- Have senior leaders meet with their direct reports to communicate the results and identify areas of concern.
- Have the department leaders determine what issues need to be fixed and incorporate into each their 90-Day Action Plan.
- Share the results openly at the next Employee Forum.
- Use the questions and comments gathered from the evaluations to provide continued feedback to the staff via emails, newsletters, and staff meetings.

PUTTING IT ALL TOGETHER

Employee Forums are quarterly employee meetings led by senior leaders. They offer senior leaders a chance to communicate and all employees an opportunity to learn about and celebrate their workplace. Employee Forums occur at set intervals with a predetermined agenda that is tied to the pillars. They are usually built around a theme that ties together the session, supports the mission, and creates an enjoyable opportunity for teamwork.
After every forum, employees complete evaluations that provide valuable feedback and provide senior leaders with insight into employee issues and morale. The results of these evaluations are then shared at the next Employee Forum, along with information about the response of leadership. Employee Forums provide the organization with the opportunity to communicate information, reinforce the organization’s mission, and gather employee feedback. They connect the organization back to purpose and provide a platform for supporting the staff as a team.

**RESOURCES**

Resource A: Employee Forum “To Do” Timeline and Checklist  
Resource B: Employee Forum Sample Themes  
Resource C: Sample Evaluation Form  
Resource D: Graphic of Evaluation Process  
Resource E: Sample of Evaluation Results
CHECKLIST

3 - 4 WEEKS PRIOR TO THE FORUM:

Schedule
• Meet with managers to schedule meetings to best accommodate needs of employee working hours.
• Coordinate times on CEO calendar.
• Publicize calendar of scheduled meetings and distribute throughout the organization.

Agenda / Theme:
• Create a way for employees to contribute issues that they want discussed.
• Create Agenda with relevant and timely topics that employees should know about.
• Select a theme.
• Write presentation information.
• Create slides and number them in top right corner.

Feedback:
• Write forum feedback questions.
• Copy feedback forms (possibly 2-sided with the agenda).

Miscellaneous:
• Coordinate room special set-up.
• Coordinate refreshments.
• Coordinate door prizes.
• Get door prize tickets.
• Get any other needed items that employees are to be given (I.e. buttons, stickers, etc).
• Coordinate with Education and Training to approve CEU credit for attendance at forums.
CHECKLIST

1 - 2 WEEKS PRIOR TO THE FORUM:
  • Copy Agendas for all participants with feedback questions on the back.
  • Send out a reminder of the upcoming sessions.

DAY BEFORE THE FORUM:
  • Get screen
  • Get poster boards describing new facilities for display.
  • Get lapel microphone
  • Get easels
  • Get extra pens and pencils for attendees.
  • Ensure room is set-up and ready for the session.
  • Place meeting agendas on each chair.

DAY OF FORUM:
  • Arrive early to ensure that refreshments and room set-up is complete.
  • Set temperature of the room to 66 degrees to ensure comfort.
  • Keep refreshments filled.
  • Videotape one of the meetings.
  • Pick 4 people from each session to stay afterwards for feedback session.

1 - 2 DAYS FOLLOWING THE FORUM:
  • Tabulate forum feedback evaluations.
  • Publish results in organization-wide newsletter or publication.
Resource B: Employee Forum Sample Themes (5.7 Toolbox)

**THEME:**
- **TO INFINITY AND BEYOND!**

**FOCUS:**
- Continuation of journey with Service, Quality, Cost, People and Growth -- Moving forward . . . Not changing directions.

**KEY AGENDA ITEMS:**
- Balanced Budget Act

**FUN IDEAS:**
- T-Shirts: Space Theme

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**THEME:**
- **ALL ABOARD THE LOYALTY TRAIN!**

**FOCUS:**
- Service -- Moving from satisfaction to loyalty

**KEY AGENDA ITEMS:**
- Retention

**FUN IDEAS:**
- Video: Jeff Gitomer clip describing the difference between satisfaction and loyalty.

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**THEME:**
- **WHO MOVED MY CHEESE?**

**FOCUS:**
- Change- Based on best selling book, “Who Moved My Cheese”

**KEY AGENDA ITEMS:**
- Balanced Budget Act

**FUN IDEAS:**
- Copies of book given away as door prizes.
- T-shirts: Chunk of cheese with quote saying, “Move with the Cheese and enjoy it”
- Quotes from the book posted around the room on yellow poster board cheese cut-outs.

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**THEME:**
- **A LEAGUE OF OUR OWN**

**FOCUS:**
- Teamwork

**KEY AGENDA ITEMS:**
- Rolling out of new mission and vision of the hospital

**FUN IDEAS:**
- Music: Sports Theme
- T-Shirts: Baseball t-shirts with hospital logo.
**Resource C: Employee Forum Evaluation Sample**

**EMPLOYEE FORUM EVALUATION**  
**AUGUST 2001**

Supervisor Name: ________________________________

<table>
<thead>
<tr>
<th></th>
<th>Very Poor</th>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. This Session has increased my understanding of the success of this organization and my role in the pursuit of excellence:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2. This session has increased my understanding of where we are at with:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Service</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>- Quality</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>- Financial</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>- People</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>- Growth</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3. Overall I would rate my satisfaction as an employee:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

4. My performance evaluation was on time: Yes: _______  No: _______

5. I like the benefits I have: Yes: _______  No: _______

<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Mixed Feelings</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. I am encouraged by the direction I see within my organization.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>7. I have the materials, equipment and supplies needed to provide quality services.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>8. I receive sufficient feedback on my performance.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>9. I feel proud to tell people where I work.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

10. Comments and Suggestions:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Resource D: Employee Forum Evaluation Process

A

Tabulate the survey results and provide copies of the tabulated information to each Employee Forum Results by

B

Allow each senior leader to meet with their direct reports to review the information. Identify areas and define what you can fix.

C

Encourage employees to write any questions which they have on their evaluations.

Publish the questions and answers on email to managers for them to post for employees to see.

Add needed action items into each Leaders 90 Day Action Plan.

Employee Forum Results by

Employee Forum Evaluation
JUNE 2000

Department ___________________

- This session has increased my understanding of where we are at with:
  - Service
  - Quality
  - Cost
  - People
  - Growth

- Overall I rate my satisfaction as an employee:

- My supervisor does what is right for employees:

- My performance evaluation is up to date:

<table>
<thead>
<tr>
<th>Service</th>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Current Status</th>
</tr>
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<tbody>
<tr>
<td>Goal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>People</td>
<td></td>
<td></td>
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</tbody>
</table>

Compare data to other forum data to test the culture and see how leaders are managing the current goals and culture.
Resource E: Sample of Evaluation Results

## Employee Forum Results by Department

<table>
<thead>
<tr>
<th>Service</th>
<th>Quality</th>
<th>Financial</th>
<th>People</th>
<th>Growth</th>
<th>Overall Satisfaction</th>
<th>Supervisor does what is right for employees</th>
</tr>
</thead>
<tbody>
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<td></td>
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<tr>
<td><strong>Summary for ‘Department’ = Accounting (8 detail records)</strong></td>
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<td></td>
</tr>
<tr>
<td>Avg</td>
<td>4.38</td>
<td>4.5</td>
<td>4.63</td>
<td>4.38</td>
<td>4.38</td>
<td>3.63</td>
</tr>
<tr>
<td>Min</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Max</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td><strong>Summary for ‘Department’ = Housekeeping (16 detail records)</strong></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Avg</td>
<td>4.07</td>
<td>4.47</td>
<td>4.25</td>
<td>4.36</td>
<td>4.25</td>
<td>3.31</td>
</tr>
<tr>
<td>Min</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>3</td>
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</tr>
<tr>
<td>Max</td>
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<tr>
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<tr>
<td>Avg</td>
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<td>3.11</td>
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