

## CLARIFYING KEY ROLES

This tool is appropriate for use in a variety of situations such as orienting new leaders, reviewing roles as part of strategic planning, or enhancing communication and conflict resolution. To facilitate a discussion:

1. Meet as separate groups (Board members, Administration/Operations, Physicians) or together in any combination
2. State the goals and purpose of the discussion. (Examples: a. Review of roles in preparation for strategic planning, b. Enhancing Teamwork, or c. Orientation of New Team Members)
3. View the 10-minute webinar, "Aligning Leadership on the Rural Road to Value: Blueprint for Performance Excellence"
4. Ask participants to individually review the points listed in the column for their role. Allow several minutes. This document can be sent to participants ahead of the meeting, also. Either way, allow a few minutes for reading it through again just before the group discussion
5. Distribute Self-Assessment Tool(s) to guide the discussion. Depending on the goals and time available, use all questions listed or choose to focus on selected questions
6. Summarize the discussion and clarifications with the statements: What we will start doing.... What we will stop doing... What we will continue doing...

Responsibility	Board Members	Administration/Operations	Physicians
Strategic Planning and Leadership	<ul style="list-style-type: none"> <li>• Establishes mission, vision and strategic plan</li> <li>• Reviews strategic plan and progress</li> <li>• Evaluates and revises strategic plan</li> <li>• Establishes and communicates</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in establishment of mission, vision and strategic plan</li> <li>• Develops specific goals and objectives based on the strategic plan</li> <li>• Reports progress to the board</li> </ul>	<ul style="list-style-type: none"> <li>• Contributes physician perspective regarding mission, vision and strategies</li> <li>• Identifies strategies for:               <ul style="list-style-type: none"> <li>○ Population health</li> <li>○ Service lines, including new ones</li> </ul> </li> </ul>

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	<p>expectations of board directorship</p> <ul style="list-style-type: none"> <li>• Assures effective participation of board directors</li> <li>• Hires administration and evaluates performance</li> <li>• Approves annual budget</li> <li>• Reviews periodic financial reports</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitates training and information exchange for board members in preparation for selection of board directors</li> </ul>	<ul style="list-style-type: none"> <li>○ Other clinical initiatives</li> </ul>
Patients, Partners and Community	<ul style="list-style-type: none"> <li>• Promotes organization to the general public, acts as ambassador to community</li> <li>• Promotes appropriate collaborative partnerships</li> <li>• Solicits community input and relays it back to administrative leaders</li> </ul>	<ul style="list-style-type: none"> <li>• Interprets the organization's mission to the community through direct involvement, public relations, literature, and work with the media</li> <li>• Seeks out and implements partnerships with other local organizations</li> </ul>	<ul style="list-style-type: none"> <li>• Informally promotes organization to the general public</li> <li>• Becomes involved in community activities and helps to lead population health initiatives</li> <li>• Provides highest quality care for patients, helps people stay well and manage their chronic illnesses</li> <li>• Assumes a measure of responsibility for quality outcomes</li> </ul>
Workforce		<ul style="list-style-type: none"> <li>• Develops and implements personnel policies</li> <li>• Recommends changes to personnel policies to the board</li> </ul>	<ul style="list-style-type: none"> <li>• Acts as a role model of excellent patient service</li> <li>• Partners with staff to provide safe, effective care</li> </ul>

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		<ul style="list-style-type: none"> <li>• Hires and evaluates all staff members (or delegates to appropriate supervisor)</li> <li>• Develops a change-ready, customer-focused staff culture</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in case management teams</li> <li>• Develops a change-ready, customer-focused staff culture</li> </ul>
Processes and Operations	<ul style="list-style-type: none"> <li>• Adopts written policies</li> <li>• Reviews policies periodically</li> <li>• Ensures proper controls are in place</li> <li>• Ensures proper paperwork is submitted to regulatory agencies</li> <li>• Exercises judgment to avoid conflicts of interest</li> </ul>	<ul style="list-style-type: none"> <li>• Identifies need for new policies</li> <li>• Implements new policies and assists board in analyzing policy options</li> <li>• Prepares annual budget with input from staff and finance committee</li> <li>• Oversees preparation of periodic financial reports</li> <li>• Implements proper controls</li> <li>• Provides information to the board about financial management</li> <li>• Compiles information for annual and regulatory requirements</li> <li>• Complies with all legal requirements regarding hospital operations and employment</li> <li>• Implements an improvement methodology such as Lean</li> </ul>	<ul style="list-style-type: none"> <li>• Provides input to clinical and non-clinical policies from the physician perspective</li> <li>• Provides input to budget regarding clinical needs and priorities</li> <li>• Keeps leadership informed about potential malpractice, HIPAA or other legal issues</li> </ul>

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Measurement, Feedback and Information Management	<ul style="list-style-type: none"> <li>• Reviews performance information</li> </ul>	<ul style="list-style-type: none"> <li>• Generates, analyzes and uses actionable data</li> <li>• Links goals and targets to overall strategic plan</li> <li>• Communicates results organization-wide</li> </ul>	<ul style="list-style-type: none"> <li>• Generates, analyzes and uses actionable clinical data</li> <li>• Links goals and targets to overall strategic plan</li> </ul>
Impact and Outcomes	<ul style="list-style-type: none"> <li>• Ensures high quality of the organization</li> </ul>	<ul style="list-style-type: none"> <li>• Develops and implements quality initiatives</li> <li>• Monitors quality scores and outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Oversees quality initiatives in: <ul style="list-style-type: none"> <li>○ Population health</li> <li>○ Process excellence</li> <li>○ Data/information</li> <li>○ Patient satisfaction</li> </ul> </li> </ul>

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