Leadership Development and Team Building for Hospitals and Health Systems

Leadership Development, Team Building, Facilitated Problem Solving and Planning to Achieve Outstanding Performance

Proposal
With Cost and Program Options

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Value Unlimited—Helping You Create Unlimited Value Through Organizational Development and Training
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LEADERSHIP DEVELOPMENT, TEAM BUILDING, FACILITATED PROBLEM SOLVING AND PLANNING TO ACHIEVE OUTSTANDING PERFORMANCE

COST AND PROGRAM OPTIONS

Value Unlimited proposes leadership development and team building with options for you to consider in designing the program of your choice. **If the cost that we propose does not fit your budget, we will work with you to lower the cost until it does fit and still provide the full program that you want.** We do this because many say that they need leadership development and team building but cannot afford it. Therefore we want to remove the financial obstacles, if possible, to enable you to have the development that you need and to enable us to fulfill Value Unlimited’s mission of helping organizations achieve outstanding performance. We provide references so that you can be assured of the quality of our work. More information on cost begins on p. 17 under “Illustrative Budget.”

As it stands, the program described in this proposal provides two days of leadership development and team building for experienced personnel who are likely to be leaders of one or more teams and members of others. You could choose to implement the two-day program as is or we could tailor the content to address additional opportunities. At the end of the two days, participants plan how to use their new skills to achieve outstanding performance in their work and in collaboration with the hospital or health system as a whole. Options for you to consider include, but are not limited to, the following:

- **Conduct a two-day program in the manner described in this proposal.** Participants can be members of an intact team, such as the CEO and his or her direct reports, or drawn from across the organization. Value Unlimited has developed the curriculum for this program.

- **Build the leadership development and team building around a problem resolution effort if participants share the same problem and could benefit from solving it.** Value Unlimited often integrates leadership development and team building with facilitation of problem solving related to real issues. In these sessions, participants progress through parts of the training curriculum and then immediately put their new skills to work in facilitated discussions that are designed to produce answers and agreement. This approach results in the prioritization of potential solutions and identification of barriers to achieving those solutions, and in planning how to remove the barriers. By participating in the facilitated process, personnel learn how to facilitate problem solving at the same time as they work together to solve real problems. Participants are committed to the solutions because they help to develop them.

- **Involves the Board in facilitated discussion, problem solving, and planning.**

- **Build follow-on coaching into the program so that participants receive assistance with implementation of their new leadership and teamwork skills.**

- **Provide leadership and team training for junior personnel to help them be successful in their initial assignments and then advance in the organization.** Value Unlimited has developed the curriculum for this basic program.

- **Include speakers and panels from your organization to address special topics.**
INTRODUCTION

Value Unlimited provides a two-day leadership development and team building program for participants to develop awareness of their existing approach to leadership and teamwork, the impact their approach has on others, and the skills and attributes needed to articulate a compelling vision and help others become part of it. **The desired outcome is for participants to enhance their ability to achieve outstanding performance in their specific assignments and in the organization as a whole.**

Also “real life” problem solving and planning can be integrated in the program to provide additional benefit. This feature may require time in addition to the two days.

Value Unlimited’s program encourages participants to decide how to put the following seven leadership and teamwork precepts into action:

1. **Know yourself and others.** What we think we are projecting to others may not be what they, in fact, see.
2. **Find common ground** through effective listening and dialogue in order to understand each other and move forward constructively.
3. **Change and grow, be flexible.** Learn to involve others and expand one’s thinking by examining issues and opportunities from different perspectives than one’s own.
4. **Create synergy** by engaging team members and potential collaborators in establishing and implementing a common vision and plans that could lead to outstanding performance individually and collectively.
5. **Develop others and help them be successful.** Give feedback, coach, and delegate meaningfully so that others can make an outstanding contribution, find a constructive measure of autonomy, and think and act creatively and helpfully.
6. **Maintain equilibrium.** Identify and manage stress and conflict, and help others do the same, so that people can maintain a constructive focus and sustain progress.
7. **Engage in principled negotiation.** Focus on the merits of the situation and on the legitimate interests of all parties; be a problem solver, identify options for mutual gain, and find ways to be objective about evaluating the outcomes.

Specific skills are presented for participants to develop and use in pursuing the precepts.

To gain insight, participants complete the Human Synergistics 360-degree online assessment of their leadership capability and ask a sample of supervisors, peers, and direct reports to complete a comparable assessment.1 Participants also complete two additional instruments online—the Myers-Briggs Type Indicator (MBTI) and the Thomas-Kilmann Conflict Mode Instrument (TKI)—to help them understand what it means to be flexible with others and to manage conflict, respectively. Participants receive individual electronic reports based on all three instruments and read them as pre-work before

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1 The surveys described here are the ones typically used by Value Unlimited. Other useful surveys are available as well.
the program (approximately 90 minutes is required). All reports are written in a positive manner and the 360-degree assessment, though it offers many suggestions for change and improvement, does so very constructively.

Participants have opportunities to reflect on and discuss their individual and team development needs and the next steps to take. At the end of the two days, participants prepare individual and team plans to guide their ongoing development and performance.

**DETAILED AGENDA**

All of the agenda topics support the seven precepts. While ambitious, this agenda can be completed in two days. The agenda topics are discussed in more detail after the following overview.

<table>
<thead>
<tr>
<th>DAY ONE</th>
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<tbody>
<tr>
<td>8:30-8:45</td>
<td><strong>Welcome</strong> by the institution’s representative</td>
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</table>
| 8:45-9:45 | **Introduction to the program and demonstration of synergy**  
The program is introduced with an activity where participants experience the development of synergy and outstanding performance. This is accomplished as participants collaborate to solve a problem. After the problem is solved, participants debrief the experience and discuss how synergy grew out of shared leadership, teamwork, and communication. The facilitator points out how the program provides opportunities to develop the leadership and teamwork skills that have just been experienced. |
| 9:45-10:00 | **Break** |
| 10:00-11:00 | **360-degree assessment results**—How you and others perceive your leadership and teamwork  
  - Overview of group results.  
  - What the results tell us about the leadership and teamwork that need to be developed.  
  - Small group discussion of significant findings in individual 360 reports.  
  - Identification by each participant of major areas where leadership development and team building would provide significant benefit. |
| 11:00-12:00 | **Temperament survey results**—How your temperament affects you and others  
  - How individual temperament relates to flexibility.  
  - How temperament differences can lead to misunderstanding.  
  - Constructive management of one’s temperament and the temperaments of others to solve problems effectively.  
  - How flexibility enables better management of stress and conflict. |
<p>| 12:00-12:45 | <strong>Lunch</strong> |</p>
<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>12:45-2:45</td>
<td><strong>Managing stress and conflict</strong>—What you do now and how to be more effective</td>
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<td></td>
<td>- Understanding the five conflict-handling modes—competing, collaborating, compromising, avoiding, accommodating—and when to use them.</td>
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<td></td>
<td>- What causes individual stress and conflict to escalate.</td>
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<td></td>
<td>- Managing the causes of stress and conflict.</td>
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<td></td>
<td>- Returning to normal after experiencing stress and conflict.</td>
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<td>2:45-3:00</td>
<td><strong>Break</strong></td>
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<tr>
<td>3:00-5:00</td>
<td><strong>Solving problems by making constructive use of differences</strong></td>
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<td></td>
<td>- How to use the four-question Z-method to involve people of varying temperaments and perspectives in constructive problem solving.</td>
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<tr>
<td></td>
<td>- Small group application of the Z-method to solve a problem.</td>
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<td></td>
<td>- Presentations by small groups on how to manage differences and avoid conflicts in problem solving.</td>
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<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>8:30-9:00</td>
<td><strong>Review of Day One and preview of Day Two</strong></td>
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<tr>
<td>9:00-12:00</td>
<td><strong>Leadership and teamwork skill development</strong>—Creating the environment for outstanding performance</td>
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<tr>
<td>(Break 10-10:15)</td>
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<tr>
<td></td>
<td>- <strong>Empowering</strong> oneself and others to achieve outstanding performance.</td>
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<td></td>
<td>- <strong>Listening with empathy</strong> to understand others and demonstrate interest in their concerns and perspectives.</td>
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<td></td>
<td>- <strong>Having constructive dialogue</strong> to increase understanding and determine next steps.</td>
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<td></td>
<td>- <strong>Delegating</strong> to develop and empower staff, and to get more work done.</td>
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<td></td>
<td>- <strong>Providing feedback, coaching, and mentoring.</strong></td>
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<td></td>
<td>- <strong>Facilitating meaningful agreement</strong> on how to achieve a desired future state.</td>
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<tr>
<td>12:00-12:45</td>
<td><strong>Lunch</strong></td>
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<tr>
<td>12:45-2:00</td>
<td><strong>Negotiating desirable outcomes</strong></td>
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<td></td>
<td>- <strong>Importance of leadership skills in successful negotiating</strong>—especially flexibility, listening with empathy, constructive dialogue, stress and conflict management.</td>
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<td></td>
<td>- <strong>“Getting to Yes”</strong>—implementing the four steps of the Harvard Program on Negotiation.</td>
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DAY TWO (continued)

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Details</th>
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</thead>
<tbody>
<tr>
<td>2:00-2:15</td>
<td>Break</td>
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</table>
| 2:15-4:00 | Preparation of leadership and teamwork plans | - Potential topics for inclusion are noted by participants as the two days progress.  
  - Participants use a four-step facilitation technique to identify and share information about leadership and teamwork skills that will help them achieve outstanding performance.  
  - Participants develop their individual plans. The plan format calls for consideration of survey results as well as topics discussed during the program. |
| 4:00-4:50 | Plan presentations          |                                                                                                                                         |
| 4:50-5:00 | Summary, course evaluation, and closure |                                                                                                                                         |

AMPLIFICATION OF AGENDA TOPICS

More discussion is provided below on the topics included in the agenda and how the topics build on each other to develop participants' leadership and teamwork capabilities.

Introduction To the Program and Demonstration of Synergy

The program begins with a group activity where participants experience firsthand how effective leadership and teamwork can facilitate the solution of a complex problem. In this case, communication and teamwork lead to collaboration, synergy, and outstanding performance.

The basic leadership model that emerges during the activity includes these elements:
During the debriefing of the activity, the facilitator introduces how the program topics will amplify what the participants have just experienced.

360-Degree Assessment Results: How You and Others Perceive Your Leadership and Teamwork

Participants complete the Human Synergistics Leadership WorkStyles 360-degree assessment which is based on self-feedback and feedback from up to twelve observers or raters, including boss(es), peers, direct reports, and others. The responses of each boss can be presented individually and the responses of other raters are broken out by categories as long as there are three or more raters in a given category. Otherwise categories are grouped for presentation.

Participants receive an electronic personal report that includes two circumplexes of the type shown below—one showing a self-rating and the second, a rating by others. In this example, the person being rated is shown to score highest in the four constructive styles (Achievement, Self-Actualizing, Humanistic-Encouraging, and Affiliative) and lower in passive/defensive styles (Approval, Conventional, Dependent, and Avoidance) and aggressive/defensive styles (Oppositional, Power, Competitive, and Perfectionistic).
The constructive styles are the ones that consistently lead to the best individual and team performance.

The personal report presents the pluses and minuses of all the results. The report includes discussion of the impact of one’s dominant styles on task accomplishment and teamwork, and also presents suggestions for change and growth. Specific ideas are provided for how to make desirable changes. Everyone can improve now and throughout their careers, including those with the most constructive styles.

In addition to the circumplex and related analysis, participants receive written comments from raters who choose to provide them as part of the online assessment.
The 360-degree segment of the agenda begins with a composite view of the 360-degree assessments of all participants and it becomes clear that the group as a whole has significant opportunities for improvement. The results of such assessments usually demonstrate the need for leadership development and team building in the areas that receive focus in the proposed program, especially empowerment; listening; dialogue; developing others and delegating effectively; providing regular feedback and coaching; being a mentor; and being a facilitative leader, especially in being able to involve others significantly in solving problems, achieving the guiding vision, and planning the work. If the composite assessment indicates different needs, Value Unlimited fine-tunes the curriculum accordingly.

After the overview, participants who have worked together give each other specific feedback about their leadership and teamwork. Participants often say that this is one of the most impactful parts of the program.

**Temperament Survey Results: How Your Temperament Affects You and Others**

There are sixteen types or temperaments in the Myers-Briggs Type Indicator typology and people of a given type often view or respond to a particular event or concept quite differently than those of other types. Differences have to do with the following:

- How people gather information and whether they focus more on specific data or intuitive insights.
- How people apply logic and how much importance is ascribed to others’ feelings as part of decision making.
- Whether people are inclined to support the status quo or are more interested in making change and finding new directions.
- Whether people want to interact with others in responding to an event or would rather be left alone to develop their own conclusions, possibly sharing them later.

All sixteen temperaments provide valuable perspectives but the leader and team cannot take advantage of the differences unless the leader is flexible in terms of acknowledging differing points of view and considering them on their merits. The leader also must convince others to express themselves openly and respond to each other constructively.

The MBTI is used to demonstrate that being flexible is highly related to emotional intelligence and maturity (EI and EM). Flexibility enables leaders and team members to learn from each other and take constructive advantage of their differing capabilities. Flexibility also empowers them to lend their perspectives in a significant way to achieving the goals of the enterprise.

**Managing Stress and Conflict: What You Do Now and How To Be More Effective**

In addition to helping leaders and teammates develop perspective, being flexible helps in identifying what causes stress in the first place. Participants use the knowledge of temperament gained during the MBTI discussion to identify how lack of flexibility causes them to lose perspective and experience stress and conflict or cause it in others. Participants identify how to regain self-control in order to manage stress and conflict (theirs and others’) constructively. Discussion focuses on how the positive, constructive aspects of one’s temperament can remain in the fore in situations where stress and conflict can derail productivity.
Participants’ capability is further developed by analyzing their “conflict profiles” based on the Thomas-Kilmann Conflict Mode Instrument. The TKI assesses an individual’s behavior in conflict situations when the concerns of two people appear incompatible. Behavior is described along two dimensions, assertiveness and cooperativeness, which are used to define five conflict-handling modes: competing, collaborating, compromising, avoiding, and accommodating. People may use all modes at different times but usually prefer to use some modes more than others. Appropriate uses are discussed for each mode.

The two dimensions of behavior and the five conflict modes are depicted in the following diagram.

Participants discuss which modes serve them best in particular situations and how to establish collaboration as the preferred mode for their work teams and for interacting with other departments and segments of the organization.

The major outcomes of the work on stress and conflict include the following:

- Increased knowledge of what causes stress and conflict for oneself and others, and of how to “step back from the edge” when on the brink of losing one’s self control. Leaders and teammates with this knowledge are more likely to maintain their perspective and ability to contribute positively when otherwise they might succumb to passive or aggressive tendencies. They also can help others do the same.

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2 Adapted from the Thomas-Kilmann Conflict Mode Instrument.
• Increased ability to bring multiple, sometimes disparate perspectives to bear on issues in a constructive way through being flexible with others’ points of view and being able to select the correct “mode” of response.

• Suggestions for maintaining a balanced, healthy lifestyle at work and at home, and how such a lifestyle can help one manage stress and conflict.

**Solving Problems By Making Constructive Use of Differences**

The Z-method,\(^3\) presented as part of the MBTI discussion, is a practical approach to being flexible where participants learn to answer questions and consider problems from multiple perspectives. This is accomplished by following the discussion sequence outlined in the following diagram. Thus people who prefer to focus on specific facts (S)\(^4\) when dealing with issues have an opportunity to voice their observations and then consider input provided by those with an intuitive perspective (N), and vice versa; and people who prefer to make decisions from a logical viewpoint (T) also consider the impact that logical alternatives may have on people (F), and vice versa.

1. What are the facts, the specifics? What do we know for sure? (S)
2. What do our intuitions tell us? What is the big picture? (N)
3. What are the logical, rational options, the pros and cons (T)?
4. What impact will people feel if the options are implemented (F)?

Participants use the Z-method during the program to analyze problems related to their leadership and teamwork, especially how to involve people of varying temperaments and opinions in constructive problem solving. Small groups practice the problem-solving approach, identify how to involve others without creating stress and conflict, and report their findings to the whole group.

**Leadership and Teamwork Skill Development: Creating the Environment for Outstanding Performance**

As noted earlier, the 360-degree assessment results influence the selection of leadership skills developed in this part of the program. In past programs, the skills discussed below typically have been the ones requiring emphasis. Any necessary curriculum adjustments are determined by analyzing the 360-degree survey results before the program begins.

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\(^3\) Donna Dunning, *Introduction to Personality Differences.* (Mountain View: CPP Inc., 2003).

\(^4\) In MBTI terminology, “S” represents sensing or paying attention to specific data; “N” stands for intuitive; “T” represents logical, rational thinking; and “F” stands for concern with how others feel.
Empowering oneself and others to achieve outstanding performance is not a single skill but rather the application of an entire set of leadership skills and attributes that enables people to focus their energy and competence constructively on carrying out activities that are personally and organizationally relevant. Empowering means creating an environment where people can act with integrity, purpose, and competence to develop synergy and desirable outcomes, and then capitalize on that synergy to pursue even more desirable outcomes. Team leaders and members can all be empowered and empowering leaders.

Empowerment has these elements:⁵

![Empowerment Diagram](image)

Trustworthiness is based on character and competence, is built over time, and leads to increasing amounts of trust in individuals and teams to pursue and create win/win relationships; that is, relationships in which everyone is positively engaged in creating mutually agreed upon outcomes. Self-directed teams and individuals commit to developing win/win relationships and their institution recognizes the importance of the productivity that ensues from the relationships. Individuals and teams are accountable to each other and the organization to pursue the desired outcomes in the manner that has been mutually agreed upon.

Listening with empathy⁶ is the linchpin of the empowered, high-performing workplace. Such listening begins with the leader who models it for the rest of the team. Empathetic listening entails paying

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active attention to all points of view, no matter how different from one’s own, and helping others think through a situation constructively. Our program provides a listening role play where leaders listen by giving undivided attention, paraphrasing what is heard, asking probing questions, clarifying details, asking for the other’s suggestions, and agreeing on the next steps to be taken. The ability to listen with empathy is an integral part of what makes a person trustworthy and leads to the trust required for win/win relationships.

**Having constructive dialogue** enables people to share information in nonthreatening ways, without feeling the need to defend or make judgments. People agree to listen to each other with empathy, ask questions for the sake of clarity and understanding, and allow enough time for all points of view to be heard. In addition to sharing information, broadening horizons, and clarifying and strengthening relationships, constructive dialogue can solve problems where lack of information has created misunderstanding or conflict.⁷ Constructive dialogue is not used to make decisions but rather provides the information and understanding upon which solid decisions can be based. Decision-making is best done during discussions which have the announced purpose of considering alternatives, making judgments, and coming to conclusions.

Effective **delegating** is essential for the leader who wants to accomplish more. Delegating is one of the best ways to develop the capability of team members to take on new work, and effective delegating can be very rewarding for both the team member and the leader because the team member acquires new skills and responsibility and the team leader ultimately frees some time for other pursuits. However, delegating can be highly nuanced because it entails varying degrees of authority, collaboration, accountability, and evaluation. Participants develop insight to the attitudes needed for successful delegation, the level of authority to delegate in varying situations, the phases of the delegation process, the two-way communication that is required, and how to avoid common pitfalls. The phases of delegation include preparation, reaching agreement, communicating and performing, monitoring and evaluating, and appreciating and rewarding. Participants are asked to identify opportunities that they have for delegating and how they will carry out the delegation process.

**Providing feedback and coaching** takes place in almost every phase of the leader’s work with the team and team members’ interaction with each other. Getting the most from a team entails making sure that information and thoughtful advice flow back and forth between the leader and team, and between teammates, in a timely and constructive manner to assist with and improve performance. This interaction may be very straightforward and to the point but also can become more complex as empowered team members discover that they need to remain open to constructive feedback at the same time as they are being encouraged to proceed independently. Continuous improvement does not occur if the leader is unnecessarily negative, presumptuous, or inconsistent, or if the team members are unresponsive to the team leader or to each other. The manner in which feedback and coaching are given also depends on a given team member’s skill level, and sometimes peer coaching can be effective in helping someone learn new skills on the job. In an empowered work environment, expectations for learning and developing new skills are established early and reinforced through the quality of the feedback and coaching that are provided.

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Program participants review steps for giving feedback that is prompt, specific, descriptive, and both corrective and reinforcing in nature. Participants also review a coaching approach that is provided to help team members grow over time and contribute successfully to the outstanding performance that the team wants to achieve.

Although a team leader must make sure that all team members receive feedback and coaching, the team leader is not responsible to provide mentoring to everyone. Mentoring can be informal where the mentor and mentee agree that they will have a mentoring relationship, or more formal as in the case of mentors and residents. Usually mentoring involves career development and networking where the mentor helps the mentee prepare for, and take, major career steps. A mentoring model is presented for discussion in which there are four stages—initiation, implementation, completion, and redefinition—and the mentor’s role is described as potentially that of advisor, protector, coach, broker, challenger, clarifier, and affirmer. What makes the mentor effective or not in those roles is also discussed.

**Facilitating interaction and meaningful agreement** is absolutely essential for team leaders and members; in fact, participants are encouraged to be “facilitative leaders” in their interaction and collaboration in general. Also there are certain times when leaders need to facilitate discussion to solve problems, and two specific techniques are presented for use in this regard. One is the Z-method discussed earlier, which is very useful in bringing different perspectives to bear in a constructive way to solve problems. The other technique entails asking four questions to reach agreement on broad topics such as the vision for a project, team, or organizational entity of any size; goals to be achieved; or how to develop an empowered work environment. The questions are: (1) What would outstanding performance be (i.e., what would it look like if we were really successful doing “X”)? (2) What are the barriers to achieving outstanding performance? (3) Who owns the barriers (i.e., who put the barriers up and keeps them up)? and (4) What can and will we do to remove the barriers? Guidelines are presented for this process and participants put it to work as they discuss how to create an environment for outstanding performance. Participants also discuss how to prepare to facilitate sessions, especially how to structure the agenda and what needs to happen to create confidence among participants that the session will encourage interaction and be productive.

**Negotiating Desirable Outcomes**

The training on negotiation is based on the approach developed by the Program on Negotiation (PON) at Harvard Law School. PON’s approach, which has been under development for more than thirty years, is that there is a way to negotiate that is neither soft nor hard, but rather “principled.” Principled negotiation is “hard on the merits, soft on the people, and . . . shows you how to obtain what you are entitled to and still be decent.”

Up to this point in the two days of training, participants have focused on many of the skills and attributes needed for successful negotiation: being flexible, valuing synergy, knowing one’s temperament and trying to understand the temperaments of others, listening with empathy, having constructive dia-

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logue, managing stress, using “conflict modes” that are appropriate for a given situation, using the Z-method to solve problems, and facilitating meaningful agreement. Now participants are able to conceptualize how to put those skills to work as part of successful negotiation. The emphasis is on achieving collaboration, rather than competing, to meet the interests of all parties.

According to the PON, there are four steps in principled negotiation:

1. **Separate the people from the problem.** Deal with issues concerning people separately from the actual negotiation and manage emotions and conflict to stay focused on the problem. Be flexible and adopt a stance where the parties think of themselves as partners looking for a fair agreement that is mutually advantageous.

2. **Focus on interests, not positions.** Avoid taking positions or aiming to reach a compromise between two sides because taking positions limits one’s options. Instead of taking positions, understand each side’s interests and needs in order to find interests that are compatible even though they may differ. Listen, have constructive dialogue, and actively seek to understand the interests and options on both sides of the problem. Knowing how to ask the right kinds of questions is important for gathering information, building the relationship, and eventually for persuading in a constructive way.

3. **Invent options for mutual gain.** Do not search for a single answer or try to reach closure too quickly; instead, look for new ways in which each side’s interests can be met. Do not assume that the “pie” is of a fixed size; rather, look for creative ways to enlarge it so that each side can have enough. A common mistake in negotiations is to assume that the pie cannot be expanded.

4. **Insist on using objective criteria.** Rather than giving in to pressure or the will of one party, both sides must be satisfied that legitimate interests are being met by the proposed solution. Search together for objective criteria, be open to reason, and yield to principle rather than pressure.

Participants discuss how to carry out each of the four steps in scenarios suggested by the facilitator and also apply the steps to potential negotiations that they might have.

The PON also has developed approaches to protect against accepting an agreement that should be rejected, or vice versa. The major approach is to know one’s BATNA, or best approach to a negotiated agreement. If one knows the BATNA, then one has a standard against which to evaluate a proposal that may not be based on the merits and should not be accepted. For a BATNA to be effective, alternatives should be considered prior to the negotiation and a tentative choice made. Additional protections derive from continuing to focus on the merits instead of giving in to positions or pressure. Focusing on the merits on both sides may influence the other party to change its strategy or may pave the way to bringing in a third party to help focus on the merits. In any case, it is essential to maintain a principled approach and not give in to stress or conflict.

The PON also has suggestions for dealing with tricky bargaining tactics or tactics that are unacceptable for other reasons. The advice is to neither give in nor respond in kind. Rather one should negotiate rules about the process of negotiation that will be used. In such cases, the matter of unacceptable tactics should be raised explicitly and the legitimacy of the tricky tactic questioned. Then the four steps described above can be applied to negotiating the negotiation process. This applies to many
tactics such as refusal to negotiate, making extreme or escalating demands, take-it-or-leave-it positions, or any method that does not involve interactive decision-making. The essence of these suggestions is to be empowered to seek a win/win solution, the first leadership skill presented in Value Unlimited’s course.

**Preparation of Leadership and Teamwork Plans**

Participants prepare two plans covering next steps to be taken. One is an individual leadership plan and the other, a team agreement if participants belong to an intact work team or a plan to develop such an agreement if they do not. Preparation of the two plans causes participants to reflect on what has been learned and decide how to put new knowledge and skills to the best use. They also engage in facilitated discussions involving the four questions described above under “Facilitating Interaction and Meaningful Agreement.” The discussions allow participants to share their priorities with each other and to expand their thinking by hearing others’ perspectives. The plan formats call for participants to identify goals, related timeframes, and specific action steps for achieving outstanding performance.

**Plan Presentations**

Participants present their plans and ask for feedback. This process calls for participants to think through their plans carefully and by presenting them, to give voice to their commitment to follow through on what has been learned during the course.

**Summary, Program Evaluation, and Closure**

The facilitator summarizes major points made during the program and asks for participants to identify the “one thing” that has made the biggest impact on them. A program evaluation can be administered using the evaluation that Value Unlimited has developed and used in the past and/or an evaluation that the host institution provides. In either case, Value Unlimited can summarize and report the results and/or the institution may choose to do so.

**PROGRAM ADMINISTRATION**

Value Unlimited works with you to establish and implement the steps needed for successful implementation. This process begins as soon as program dates are established.

**ILLUSTRATIVE BUDGET**

This budget is based on providing the complete two-day program described in the preceding pages. Value Unlimited proposes to **identify an acceptable budget with you based on the program options that you select and your budget capability. Fees can be adjusted if necessary** but course expenses, such as the survey costs, must be paid in full. Value Unlimited is confident that a workable arrangement can be identified with sufficient value for everyone involved.

**Fee**

Value Unlimited proposes a fee of $12,500 to prepare for, and conduct, the leadership development and team building program. Preparation includes such activities as interaction with survey vendors, status checking and reporting on survey completion, modification of training materials based on actual 360-degree assessment results, preparing and analyzing the composite 360-degree assessment re-
sults, and other tasks of a specific nature that arise when planning and preparing the program that is envisioned.

**Expenses**

While the following illustration of expenses is based on 30 participants, Value Unlimited does not place restrictions on the number of participants involved.

- The vendor’s charge for the **360-degree online assessment** is $270 per participant but there are substantial volume discounts as follows:
  - 5% for $2,000-$3,500
  - 10% for $3,501-$5,500
  - 15% for $5,501 or greater.

Thus if there are 30 participants the cost for the instruments would be $6,885 ($270 x 30 x .85).

This cost compares favorably with another 360-degree instrument that Value Unlimited has used with mid-career clients. That cost is $299 per participant and would require approximately $1,100 more for 30 participants even with volume cost breaks.

- The costs for the **MBTI and TKI** are $13.95 and $14.95 each, respectively. There is an additional charge of $1 per participant for an MBTI “table type tent.” The total MBTI and TKI costs for 30 participants would be $867.

- There is a cost for **printing** the participant manual and Value Unlimited provides electronic copy if you choose to do the printing. The manual contains approximately 200 PowerPoint slides printed three to a page. There are also approximately 30 pages of additional handouts. If Value Unlimited is responsible for the printing, we will need to have it done by a commercial printer and therefore charge you commercial rates for printing and shipping.

  There is no direct printing cost for the 360-degree, MBTI, and TKI reports because participants read their electronic reports for pre-work. They are asked to print hard copies to bring to the program.

Value Unlimited proposes to send two **invoices**, the first as soon as the number of participants is known to cover the cost of the surveys and half of the agreed-upon fee, and the second after the program has been completed for the balance of the fee and remaining reimbursable costs.

**CONCLUSION**

Value Unlimited has proposed a two-day leadership development and team building program for hospitals and health systems, and also has suggested options which the host institution might pursue to build a program that suits its unique needs. Value Unlimited also has proposed to identify a budget based on the options selected and what the institution can afford. Questions and discussion concerning the proposal are welcome.
APPENDIX

EXAMPLES OF WORK AND CLIENTS’ CITATIONS
APPENDIX
EXAMPLES OF WORK AND CLIENTS’ CITATIONS

Value Unlimited provides training, facilitation, consulting, and executive coaching to help organizations achieve Outstanding Performance. Examples follow of the work and what clients think about it. For more information, please visit www.valueunltd.com.

TRAINING

School of Medicine

The Institute for Clinical and Translational Science at the University of Iowa introduced a two-day course designed to enhance the skills of junior investigators in the areas of scientific leadership, team building, and research program management.

“The initial course attracted faculty from six colleges (Medicine, Public Health, Pharmacy, Dentistry, Liberal Arts, and Nursing). The course was facilitated by Brian Fitch, PhD, a nationally recognized expert management consultant, and the course covered the following specific topics: leadership, communication, conflict management, delegation, coaching and facilitative leadership of teams. Evaluations of the course were generally excellent and are summarized below.

"We were truly impressed with Brian’s knowledge and expertise and would recommend him to anyone interested in scientific management and leadership skill development. Our faculty saw an immediate benefit from his two-day program. We will continue to use him as our ‘master facilitator.’"

– Julie Eichenberger Gilmore, PhD
Associate Administrator, Research Training and Career Development

Allied Health Sciences

In 2006, the Office of Academic Career Development for University of Pittsburgh Schools of the Health Sciences invited Value Unlimited to participate in the design and development of its 3-day course titled Course in Scientific Management and Leadership (CSML). Value Unlimited has presented and facilitated the first 1.5 days of the course annually from 2006-2011 and will do so biennially thereafter. There have been approximately 60 participants each year.

"The CSML has been recognized nationally as a model learning forum for new biomedical scientists, clinical researchers, and health science educators. Brian Fitch has been the anchor of this program since its inception. The following results from the course evaluation conducted in 2010 speak to the quality of Brian’s performance and the modules he developed.
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“Furthermore, Brian has served as an executive coach for me and others within the Office of Academic Career Development. His high standards for professionalism and responsible leadership are not only evident in his instruction, but in his values and behaviors as well.”

– Darlene F. Zellers, Director
Office of Academic Career Development
University of Pittsburgh Schools of the Health Sciences

**Business**

Red Roof Inns needed Inn managers to do a better job of maintaining very high company standards on the inn properties. Value Unlimited conducted a needs assessment and analysis of core competencies which indicated that current training for managers did not provide the necessary skills for nearly two thirds of the competencies required for effective job performance. Value Unlimited then provided the design for, and coordinated the development of, the new training.

"Dr. Fitch was responsible for designing our new training program and was able to show us exactly where we needed new training and what the training would be. Brian was exceptionally strong both in advising our company’s senior management and in helping the staff stay on target and finish the work on schedule. The program was a tremendous success due in large measure to Brian’s leadership."

– Patricia L. Dove, Vice President of Training

**Professional Sports Team**

The president of the Miami Heat Group (National Basketball Association) wanted his entire management team to have an opportunity to improve its teamwork and productivity. Value Unlimited conducted three two-day retreats—with senior vice presidents, vice presidents and directors, and managers—to develop the leadership, teamwork, and communication skills that are needed for Outstanding Performance. Participants received feedback from 360-degree leadership surveys and each other; prepared individual leadership development plans; and, based on their MBTI results, considered how to manage stress and conflict on the job.

"We were really, really happy with Value Unlimited. They were tremendous."

– Eric Woolworth, President, NBA Miami Heat Group
**Academic Medical Center**
In the spring of 2012, Value Unlimited is beginning a leadership development project involving directors of intensive care units in an academic medical center. The program includes 360-degree assessment, managing stress and conflict, communication and feedback skills, collaboration between care givers and departments, negotiation, and a facilitated discussion of how to achieve Outstanding Performance in the ICUs. Participants also will be developing and presenting individual plans for implementing their leadership capability.

- A citation will be requested when the program has been completed.

**FACILITATION**

**Medical School Faculty and Students**
Case Western Reserve University's School of Medicine, Department of Pharmacology, decided to involve its faculty, postdoctoral fellows, staff, and students in rethinking the Department’s direction and goals. Value Unlimited facilitated development of a vision of Outstanding Performance for the years ahead, as well as goals and action plans. To increase the collaboration and communication that are needed to achieve the vision and goals, Value Unlimited also conducted leadership development and team building and guided the Department in implementing a mentoring program.

"Value Unlimited has played an instrumental role in helping the Department develop a common vision that involves shared leadership. His "Outstanding Performance" model for strategic planning proved to be a dynamic tool that is direct, easy to use, and applicable to a variety of situations. Most importantly, Brian Fitch is a superb facilitator who immediately earns the trust and respect of his audience."

- John H. Nilson, Ph.D., Chairperson, Department of Pharmacology

**Professional Sports Team**
The NBA Cleveland Cavaliers organization is justifiably proud of the outstanding service that it provides to its customers. Because the Sales Department and Building Operations Department must collaborate seamlessly to meet and exceed the expectations of corporate customers and advertisers, the company asked Value Unlimited to help the two departments develop greater synergy. Value Unlimited facilitated a series of interactions to involve personnel in identifying what Outstanding Performance would be, what the barriers are, and how to remove the barriers. Value Unlimited also provided training to help all staff become empowered, proactive, and accountable in meeting the expectations that they created for Outstanding Performance.

"Value Unlimited has been an integral partner in our effort to continuously improve the service we provide to customers. Brian Fitch infused his Outstanding Performance concept into his facilitation of sessions with us, and also into the training he has done. The increase in synergy is remarkable. Value Unlimited has taken us to a new level of surpassing our customers' expectations."

- James C. Boland, President and CEO

**Health Care Business**
The Ernst & Young Management Consulting Health Care Practice needed to emerge from a large set of "silo practices" into a unified national practice that consistently provides the highest quality of services to a very large number of clients. Therefore twelve offsite retreats were conducted of ten days each, and every partner and senior manager in the practice participated in one of the retreats.
Value Unlimited provided leadership development, team building, and facilitation for approximately three of the ten days in each of the retreats. Team building included technical rock climbing that served as a metaphor for the planning, training, communication, and support that are needed for teams to achieve Outstanding Performance.

"I call Brian a master facilitator because he gets people to take a risk, and they always trust him and believe they will be better off doing what he says."

– Jay C. Juliussen, Partner, Ernst & Young LLP

CONSULTING

Regional Hospital
Terre Haute Regional Hospital needed to be proactive about identifying new health care needs and providing the best care possible. Value Unlimited interviewed the medical staff to identify opportunities for change and improvement and reported the results to the Medical Staff, Hospital Administration, and Board of Trustees. Value Unlimited then conducted a retreat with the Administration and Board to establish the strategy for achieving Outstanding Performance.

"The Outstanding Performance concept introduced by Value Unlimited has been the driving force behind our strategic initiatives. It created an opportunity for the Board, Medical Staff, and Administration to identify specific topics to focus on and to improve patient care. Value Unlimited provided that objective viewpoint that was essential for moving ahead."

– Jerry Dooley, CEO

Business
Allen Telecom Inc. was experiencing a serious lack of collaboration and communication between the corporate headquarters, existing business units, and newly acquired companies in the U.S. and Europe. By conducting interviews, Value Unlimited determined that cultural and organizational barriers were impeding commitment to a common vision and goals. Value Unlimited conducted a team building retreat to develop trust and communication and then facilitated the development of the vision, values, and goals for the entire organization.

"Value Unlimited was able to break down barriers, beginning in the first session with us, that we had been trying to break down for over two years. Dr. Fitch’s objective analysis and impartial coaching and facilitating obtained a level of commitment to what we were trying to accomplish that I would not have thought possible."

– Robert G. Paul, President and CEO

EXECUTIVE COACHING

Professional Sports Team
The general manager of American Airlines Arena in Miami, in her pursuit of excellence, decided to improve productivity in a large organization that already demonstrated a high level of efficiency in booking professional basketball and entertainment events.

"There is no doubt in my mind that through Brian's coaching and insights, I have evolved into a stronger manager and leader who is ready for the difficult challenges we all face in today's increasingly complex and ever-changing world. No matter how tough the management or leadership challenges that I am facing may be, Brian always provides me with the right tools at the
right time to handle them properly, and he does this with a wonderful personal style that is also very time-efficient.”

–Kim Stone, General Manager, Miami Heat

**Business**

Datum Inc., a high-technology engineering company, was expanding rapidly by acquiring companies across the United States. Value Unlimited coached individual presidents, and the entire leadership group, in the value and techniques of constructive communication and collaboration. Then the executives from Datum and the acquired companies came together for leadership development conducted by Value Unlimited, so that they could agree on the core values and business goals that would guide their work together.

“As is often the case after acquisitions, many of our executives lacked a common focus and commitment to what would make our new, larger company successful. Brian’s coaching was highly effective in helping individual presidents make the transition from managing their previous operations to taking responsibility for the Outstanding Performance of our company as a whole. His own commitment to achieving synergy through effective collaboration provided a very useful model for us.”

– Erik van der Kaay, CEO

**Health Care**

Value Unlimited carried out a variety of assignments over an 18-month period as McGregor made the transition to a new management team and a skilled nursing facility.

“Dr. Brian Fitch performed important work for us during a transformative time in our recent history. We terminated a Chief Operating Officer who had served in her position for more than 20 years and during the tumult that followed, many of the terminated COO’s direct reports left the organization, as well. We therefore had to recruit an almost entirely new team around a new COO. Into this situation we retained Dr. Fitch to assist us with teambuilding, conflict resolution, executive coaching and anger management.

“Dr. Fitch used personality tests and face-to-face meetings to acquaint himself personally with our entire management group comprising approximately 40 individuals. The results of the personality tests served as the basis for a teambuilding program that exposed organizational weaknesses where needed cooperation between two or more individuals in key positions failed. Dr. Fitch targeted these relationships in his coaching.

“An example of the coaching involved our director of environmental services and his counterpart in buildings and grounds, two individuals whose jobs required close cooperation. Their dislike for each other—entirely predictable from their respective personality test results—had become counterproductive. The fact that one is African American and the other Caucasian made the situation potentially virulent for the entire organization. Dr. Fitch worked with the two together to resolve their differences, and they are among our highest performers to this day.

“In every situation in which Dr. Fitch engaged our officers and employees, he won their confidence with his consoling and positive manner. He is an excellent communicator both one-on-one and in groups. But he gently demands constructive candor at all times. This defines the tremendous value that he dependably provides.”

– R. Robertson Hilton, President and CEO

The A.M. McGregor Home