

metrocare.

# So, You Want to be the CEO?

Developing Future Leaders  
within a Culture of Inclusivity



TX Council June 2024

Find **leaders** here.



## **AGENDA**

**History**

**Culture**

**Listening to Your Team**

**Data Driven Design**

**Metrocare's Program**

**Application**

**Q&A**

Find **leaders** here.

## Step 1

# Examine Your Historical Approaches to Leadership Development

**"You can't really know where you're going  
until you know where you have been."**



# Our History.....Metrocare University

In 2014, Metrocare launched a new initiative focused on workforce development, aptly named  
**Metrocare University.**

This approach included training programs focused specifically on manager and leadership development.

**Foundations of Leadership:** What every leader needs to know

**The Manager Toolkit:** What every manager needs to know

**Advanced Leadership:** Going beyond the fundamentals of management and leadership

**Transformational Leadership:** Becoming the kind of person people willingly follow

# Metrocare U: Foundations of Leadership

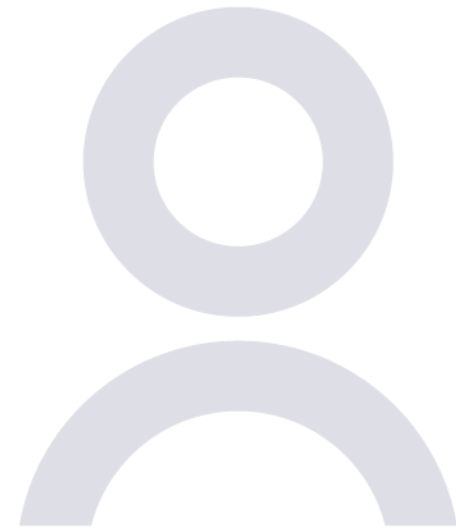
**Facilitator:** Strategic Solutions Group and Metrocare's Executive Team

**Audience:** Metrocare's middle and upper management workforce

**Format:** Monthly half day, group sessions and individual coaching sessions with facilitator

## Example Topics

- Dealing with fear
- Branding yourself within the organization
- How to Influence Growth and Success in Others
- Strategic Leadership
- Listening and Empathy
- Coaching for Performance
- Establishing Clear Expectations



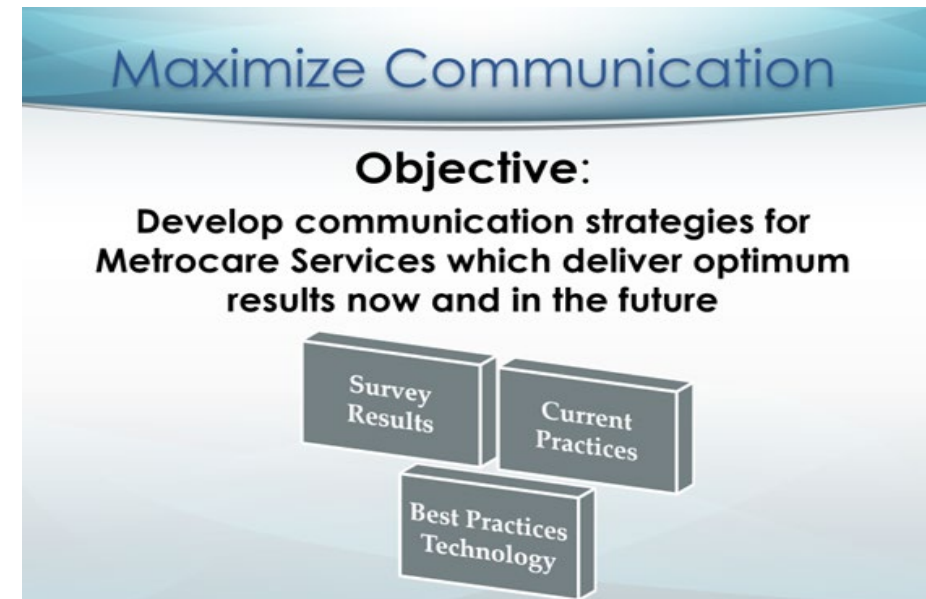
# Metrocare U: Foundations of Leadership

## TEAM MISSION STATEMENT:

*“To optimize each members assets to collectively tackle real-world challenges that impact Metrocare Services.”*



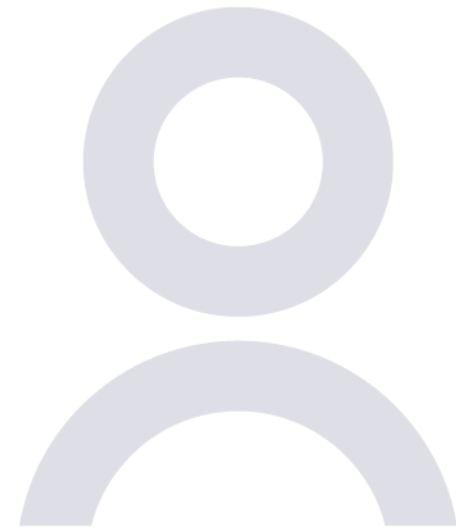
2014 Metrocare Leadership Institute



# Metrocare U: Foundations of Leadership

## "Real Life" Group Projects

- Pay mileage for personal cars or invest in a fleet of agency owned vehicles?
- How to optimize social media?
- What should our communication strategy be for both employees and those we serve?
- Should we expand pharmacy services to other centers?
- How should we invest in Housing for our community?
- What Crisis Services should we build?
- What should be our Clinic Security Program?
- Should we run a Metrocare Call Center?



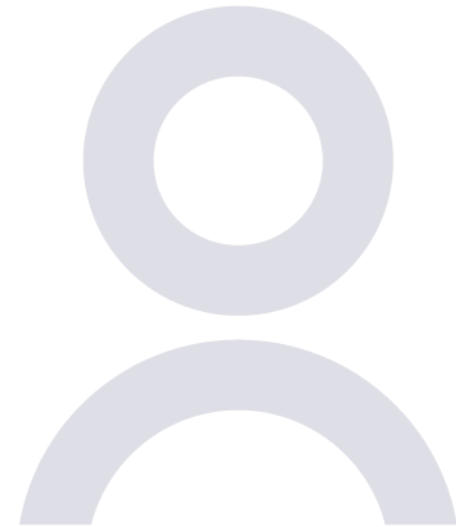
# Metrocare U: Foundations of Leadership

**Time Investment:** Significant

**Financial Investment:** \$\$

**Impact:**

- Great leadership training.
- Engaged staff from different departments.
- Provided solutions to real problems.





# Metrocare U: The Manager Toolkit

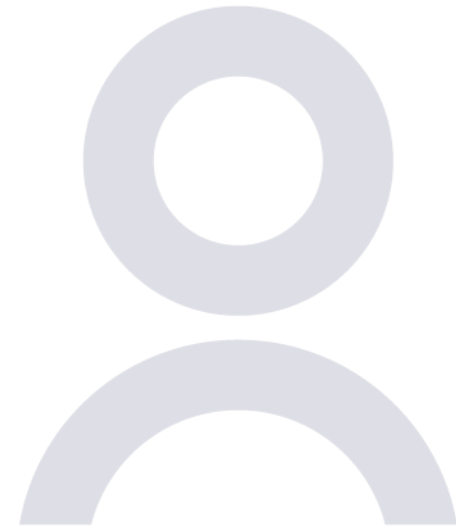
**Facilitator(s):** Human Resources, Executive Leadership, Relias Learning System

**Audience:** Metrocare's New Managers

**Format:** 12 hours of Leadership/Management Training per year

## Example Topics

- Inclusive Leader
- Putting it into Context
- Tips for Successful Feedback
- Leader vs Boss
- Manager Self-Assessment
- Coaching
- Employee Engagement Drivers
- Tom Clark's Rules for Managers
- Senior Leadership Recommended Reading



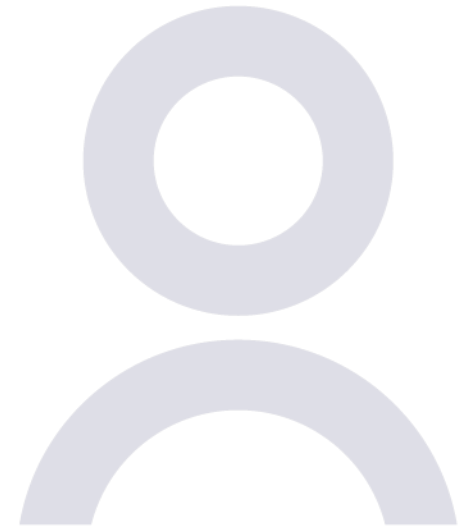
# Metrocare U: The Manager Toolkit

**Time Investment:** Minimal

**Financial Investment:** \$

**Impact:**

- Able to build training module focused on the necessary skills to succeed within Metrocare's culture.
- Engaged Metrocare's tenured leaders in a new way.



# Metrocare U: Advanced Leadership

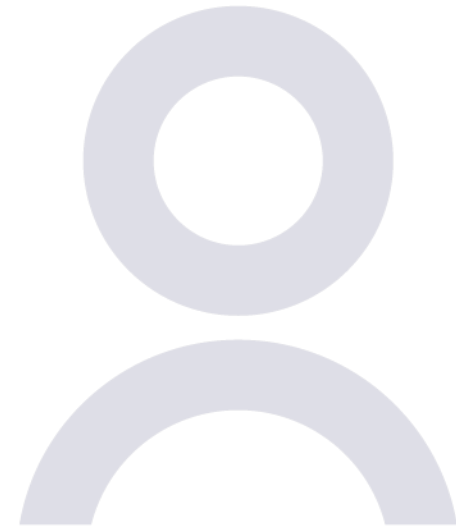
**Facilitator(s):** Strategic Solutions Group and Metrocare's Executive Team

**Audience:** Graduates of the Foundations of Leadership Program

**Format:** Bi-monthly 1.5 hour training (in person and virtual) and optional individual coaching

## Example Topics

- Emotional Intelligence
- Career Management
- Coaching and Feedback
- Accountability
- Strategic Thinking
- Succession Planning



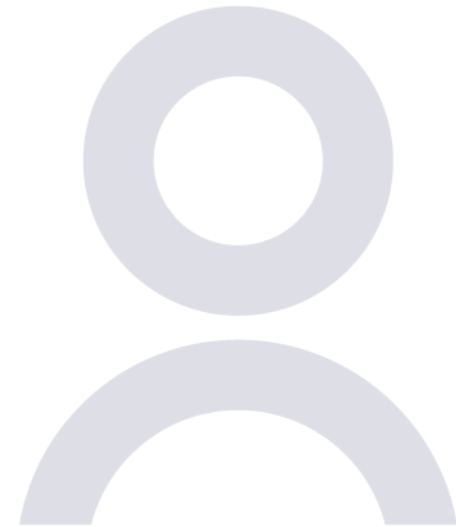
# Metrocare U: Advanced Leadership

**Time Investment:** Moderate

**Financial Investment:** \$\$

**Impact:**

- Gave support to most senior level of management.
- Smaller group allowed for more discussion and reflection.



# Transformational Leadership

**Facilitator(s):** Simple Leadership Strategies

**Audience:** Anyone in management position

**Format:** 3 half-hour coaching sessions, seven 70-minute weekly sessions

## Example Topics

Meaningful and Lasting Change

Positive Psychology

Earning Trust

Building Confidence

Inspiring Action

Emotional Intelligence





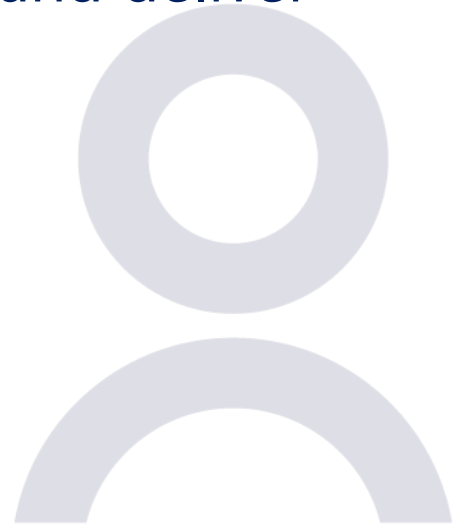
# Transformational Leadership

**Time Investment:** Significant

**Financial Investment:** \$\$\$

**Impact:**

- Great Training Program for new managers.
- Provided practical tools that managers can use to organize and deliver supervision, support, and coaching.



# Our History Taught Us

- To provide opportunities for staff from different departments to work together
- Use of external facilitator can create “good” pressure on leaders to challenge each other
- Group projects create ownership and accountability to “real life” issues
- New managers need more support and opportunity for interaction with HR and other managers
- Self-paced trainings do not get prioritized
- Senior level staff welcome continued learning and support when it goes beyond the fundamentals of leadership/management
- Managers appreciate training that reinforces importance of self-care
- Managers appreciate trainings that provide practical and useful tools
- Staff will invest their time and energy to leadership development
- **Our approach to leadership training cannot be “one size fits all”**



# Step 2: Understand and Develop Your Culture

## **METROCARE CULTURE CREED:**

*Inclusion is how we unleash the power of diversity.*

*We strive to foster belonging and empowerment at work.*

*Specifically, we are a stand for anti-racism, we are a voice for LGBTQ+ and BIPOC (Black / Indigenous / People of Color), we are culturally competent for our military family, and we are a Trauma-Informed Company (TIC).*

Find **culture** here.

# Who are Culture Champions?

**Metrocare  
high-performing team  
members who are  
committed to make us  
each individually  
better and collectively  
build a stronger  
organization.**



# Who are Culture Champions?

**Co-Leadership** – 2-year, staggered terms

Person of Color: Tameka Y. Cass

Ally: Tate Ringer (Executive Sponsor)

## **Committee Members**

- 14-16 Metrocare staff
- 2-year, staggered terms; build rotation first year
- HR Director or Manager
- A representative from the TIC Committee.
- Representation from every department, group or division, but no more than two from one area.

## **Selection Process**

- Employees nominate peers or, if self-nominated, provide a reference from another peer.
- Must be in good standing with last review at 2.5 or higher.
- FY22: Co-leads + HR Director with Executive Team approval.
- On-going: Out-going team selects next crew.

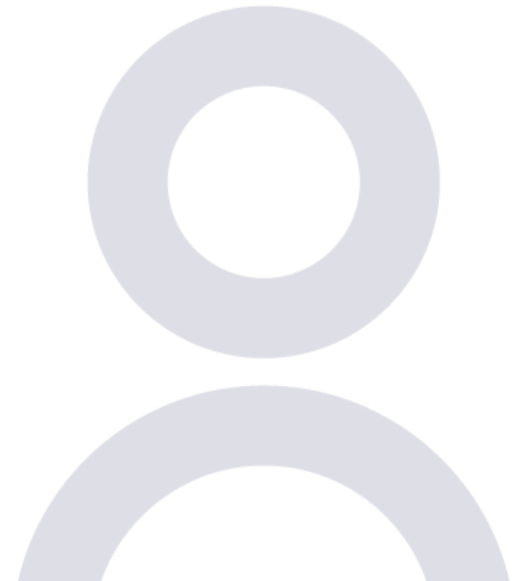




# Goals of Culture Champions

---

1. **Strengthen** Employee Engagement
2. **Ensure** Diversity and Inclusion efforts are saturated within and throughout Metrocare
3. **Build** "Agency" with Employees



# Culture Champions Accomplishments to Date

**FY21 (Year 1)** – Research, Best Practices and Development; LGBTQ+ initiative launched

**FY22 (Year 2)** –

- Establishment of Culture Champions: adopted by Executive Team
- Peer Nominations and Applications
- Creed written adopted and presented to Board
- Brainstorming and identification of baseline
- Review materials and provide culturally competent feedback
- Support LGBTQ+ initiative
- Started researching training options

**FY23 (Year 3)** –

- Training RFP produced and executed; Exeter selected
- Chief Diversity Officer established
- Culture Survey developed
- Survey launched – 61% response rate!!!!
- Training completed with 99.1% completion rate!!!!
- Supplier diversity expansion initiative



# Step 3 Listening to Your Team

Find **leaders** here.

# Strengthen Employee Engagement

Gallup has studied Employee Engagement for 21 years with over 35 million respondents in their database. Engagement is defined as “those who are involved in, enthusiastic about and committed to their work and their workplace.”



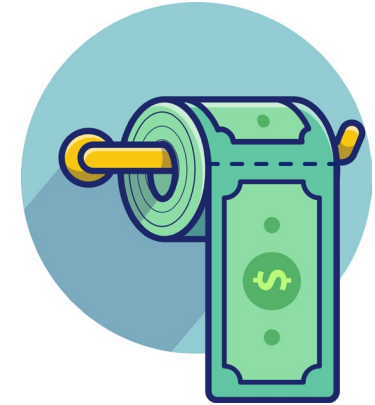
High Performers deliver  
**400% more productivity**

Harvard Business Review



Highly Engaged Teams **show**  
**21% greater profit**

Gallup



Disengaged Teams  
**cost \$550B per year in US**

Gallup

# Gallup Engagement Survey

Gallup has been studying employee engagement and performance for over 75 years.

They have studied over 2.7 Million workers across over 100,000 teams.

Also known as the Q12®, the survey's 12 questions have been proven to help assess and improve productivity.



The Q<sup>12</sup> is proven to link to greater performance outcomes better than our competition's survey does.



The 12 Items give managers a framework to have motivating conversations with employees.



You can compare your results with other organizations and teams within our database.

The Transformational Leader Manager Program is linked to the Gallup Survey.

**For more details behind the science, visit Gallup's website:**

[https://www.gallup.com/workplace/356063/gallup-q12-employee-engagement-survey.aspx?gclid=EAlaQobChMIhPrIojP\\_QIVFnFvBB3jqgchEAAYASABEgK8Cfd\\_BwE#ite-356069?utm\\_source=google&utm\\_medium=cpc&utm\\_campaign=gallup\\_access\\_branded&utm\\_term=gallup%20employee%20engagement](https://www.gallup.com/workplace/356063/gallup-q12-employee-engagement-survey.aspx?gclid=EAlaQobChMIhPrIojP_QIVFnFvBB3jqgchEAAYASABEgK8Cfd_BwE#ite-356069?utm_source=google&utm_medium=cpc&utm_campaign=gallup_access_branded&utm_term=gallup%20employee%20engagement)



# Ensure Diversity and Inclusion efforts are saturated within Metrocare

Talent Management efforts fall into three categories:

- (1) improving the performance, or replacing, below minimum team members;
- (2) growing adequate performers into high-performing team members; and
- (3) retaining and nurturing high-performing team members.

Of the three:

***Investing in growing and supporting high performing team members has a better return on investment than any other recruiting and retention effort.***



# Culture Survey Overview

## Culture Champions' Objective

- Better understand the diversity of the Metrocare team
- To gain a deeper understanding of demographic characteristics of the staff
- To identify attitudes and awareness of factors that influence the culture of the company

## Process

The Culture Champions team met several times over the course of three months to identify key attributes and relevant demographic factors to better understand in order to build a strong culture.

## Questionnaire Design

- 10-12 minutes to complete (Actual median = 7:31)
- Anonymity and aggregate reporting emphasized
- Two open ended-questions (optional completion)
- A 5-point Likert scale to measure perspectives
- A 0-10 Likert scale to measure attitudes  
Ratings of 7-10 reported as "POSITIVE"  
Ratings of 0-4 reported as "NEGATIVE"

## Execution

- 491 (61%) of 892 completed all or most of the questions.
- Invitations sent by SMS text twice + internal emails sent twice
- Leadership encouraged participation; respondents were offered \$5 gift card honorarium. 360 accepted.

## Dr. Michael Egan Researcher

Dr. Egan has over 50 years of research and development experience with Fortune 1000 companies and organizations around the world.

Dr. Egan has been surveying our clients and supporting our mission for over 5 years. He is a dedicated fan of Metrocare!

# Find **culture** here.

## Areas of Strength from both Surveys

### **Metrocare Culture Survey**

Teamwork and cooperation are our Superpowers

My colleagues are sensitive and supportive

Inclusion is how we unleash the power of diversity

My colleagues respect my opinion

### **Gallup Engagement Survey**

I know what is expected of me

I have the materials to do my job right

I have the opportunity to do what I do best

Mission of company makes me feel my job is important

Co-workers are committed to quality work

My supervisor or someone cares about me as a person

**CULTURE CREED:** Inclusion is how we unleash the power of diversity. We strive to foster belonging and empowerment at work. Specifically, we are a stand for anti-racism, we are a voice for LGBTQ+ and BIPOC (Black / Indigenous / People of Color), we are culturally competent for our military family, and we are a Trauma-Informed Company (TIC).

# Find **culture** here.

## Areas to Improve from both Surveys

### Metrocare Culture Survey

Metrocare embodies Culture Creed\*  
My colleagues respect my opinion\*  
Leadership is supportive on sensitive issues  
Leadership listens

### Gallup Engagement Survey

Someone encourages my development  
My opinions count  
Someone talks to me about progress (w/in 6 mos)  
Opportunities to learn and grow  
Recognition in the last seven days  
Connected (substitute for best friend question)

\*These two were borderline but also had positive comments so listed it here to strengthen further.

# Report Back to the Managers and then the Agency



## What do we do Now?

### The Process

1. Culture Champions and Exeter Diversity Consulting reviewed the results of the Culture Survey in detail.
2. C-Suite Leadership and Senior Managers reviewed the results of both the Culture Survey and the Gallup Engagement Survey.
3. Both groups separately participated in facilitated brainstorming sessions to address the areas to improve (slide 20).
4. Culture Champions reviewed the ideas and made additional recommendations.
5. All staff to be provided with the information and results with a town Hall with Dr. Burruss to discuss.



# Ideas – Implemented or in Process!

## Leadership is SENSITIVE; Metrocare Follows the CULTURE CREED; Colleagues RESPECT

- Staff counselor
- Use fresh eyes to survey the written messaging at every physical site
- More DEI training across the agency
- Cultural holidays off\*
- Supplier Diversity program launched
- LGBTQ+ group launched, pronouns added to MyAvatar and training of mental health team scheduled.

## SOMEONE TALKS TO ME ABOUT MY PROGRESS

- Reinforce Pillars more consistently
- Use the TLM feedback form
- Reframe how we talk about benchmarks
- Mentor programs: these are in development in both Mental Health and LIDDA operations



## LEADERSHIP LISTENS; MY OPINIONS COUNT

- “Office Hours” Executive and Senior Management work a day at a clinic or community location
- Town Hall meetings for all staff (some in person)
- Casual visits by senior management at all locations / GEMBA walks
- “You said. We Listened” communications
- Respond to surveys
- Focus group on outlier groups to better understand
- Process Improvement contest
- Virtual suggestion box

## RECOGNITION RECENTLY

- Be more consistent with tenure recognition
- Formal recognition for shoutouts / recognition

## OPPORTUNITIES TO LEARN & GROW

- More career development fairs
- Career path shadow opportunities
- Regular, intentional discussions with supervisors

\* A note about Cultural holidays: *There are 25-40 major religious holidays among the world's 7 major religions, depending on how you count them. The three floating holidays of the 10 offered by Metrocare are designed to allow people the flexibility to use for their own cultural, religious, ethnic or personal use.*

# Ideas – Implemented or in Process!

## MENTAL HEALTH OPERATIONS

- Aligned benchmarks with pillars and the A/B/C references from Leadership Training (TLM) for feedback on progress
- Incorporated TLM on concepts and questions in clinical supervision form
- Creating supervision form for individuals outside of the TAC requirements
- Clinical training academy extended
- Revised Mentor program in development

## COMPLIANCE / QUALITY MANAGEMENT

- Implementation of MAPP procedure portal
- Collaborative Quality Management Model – takes QM beyond reporting to collaboration with operations

## HR

- TalkSpace mental health benefit
- GUUSTO employee recognition and rewards program
- Employee appreciation week
- Modernizing the annual performance evaluation process
- Implemented best practice recruitment and retention program

## LIDDA

- Mentor program in the works
- Aligned benchmarks with the four pillars
- In process of improving monthly supervision to incorporate pillars and trauma informed care
- Revising Service Coordination Training Academy

# Ideas to Consider – Long Term Solutions

## Leadership is SENSITIVE; Metrocare follows the CULTURE CREED; Colleagues RESPECT

- Affinity groups
- Bi-annual focus groups for DEI
- Leadership/diversity engagement days

## RECOGNITION RECENTLY

- Employee of the Month & Year – Frame at each site
- Highlight the Professional Development Fund success

## CONNECTED to my team

- Hire good employees' best friends
- Develop Employee Engagement Plans
- Produce "A Day in the Life!" stories and content
- Have employee relation events
- Employee talent show
- Agency team building / field day twice a year

## SOMEONE ENCOURAGES MY DEVELOPMENT

- Professional Pathway Development plans
- Increase professional development fund amount
- Annual ½ day retreat per RU

## LEADERSHIP LISTENS; MY OPINIONS COUNT

- In-person town halls

## SOMEONE TALKS TO ME ABOUT MY PROGRESS

- 360 performance evaluations

## OPPORTUNITIES TO LEARN & GROW

- Senior – Junior Mentorship / Junior – Entry mentorship
- More career development fairs
- Attend more conferences
- Increase employee development fund

Ideas that require funding, volunteer planning committees and/or time to accomplish

# Step 4 Data Driven Design

Find **leaders** here.

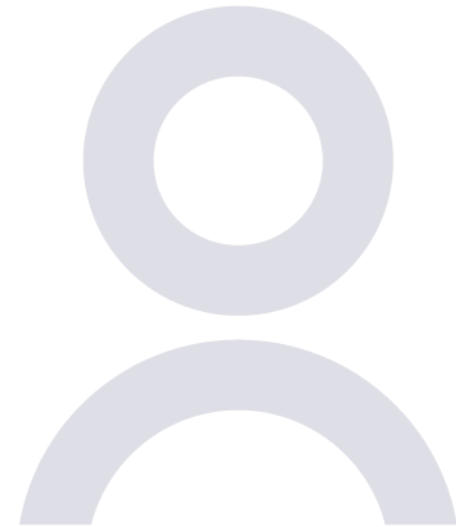
# Needs Analysis

## **HR Experience – Qualitative**

- Ticketing System Questions
- Investigations: Reveal Gaps and Opportunities
- Technological and Continuous Improvement

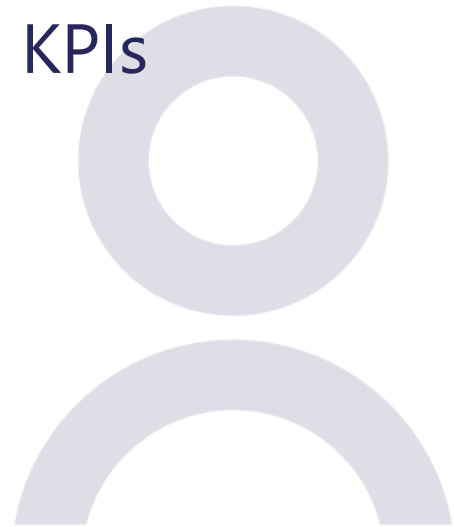
## **Data - Quantitative**

- Exit Interviews
- PIPS
- MORIS (Incident Reporting)



# Summary

- Great leadership programs but focused mainly on upper leadership
- Culture development and staff feedback critical
- Use data to drive development
- Reinforce feedback to staff about accomplishments and responses
- Important to align with agency objectives, strategic plan and KPIs from top down



# Metrocare's Leadership Program

Find **leaders** here.





Find leaders here.

Philosophy: Align all trainings with Metrocare Values (QPID) and Pillars / Strategic Plan. Reinforce at every level of training.

Program*	Attendee	Objectives	Timing / Location	Coaching	Leader
Culture Advancement	All Staff	Investment in cultural competency and belonging		n/a	Tameka / CC
Schizophrenia Simulator and/or Disability Experience	Administration	education and development of cultural humility to disability by having admin workforce participate in simulator that demonstrates the challenges of those with chronic and persistent mental illness	1 x event	n/a	Dr. Burrus/Dr. Hunter/Clinical Chiefs
Advanced Leadership	Senior Leadership	Deep dive into The Culture Code book to reinforce skills and MC values and to inspire; divide into small groups and have each group take a chapter to review at Sr Mgr.	Monthly with Sr Mgr Meeting / In-person	Optional with TLM	Self-driven
Foundational Leadership: TLM	Everyone in a management position	Strengthen leadership base and support growth from within the organizations.	7 weeks / virtual	included	SLS / John Wright
Metrocare Management 101	Required for any new manager or new to MC; optional for all	Strengthen management competency and support of teams through strong fundamentals. Topics include: ADA, FMLA, compensation, difficult conversations, processes.	Monthly lunch and learns / virtual; recorded	n/a	Various internal and external
Leader					
Self Care	All Staff	Reinforce and support self-care for workforce that can experience Secondary and Vicarious Trauma	4 x per year	n/a	Human Resources
Pathways	Anyone who wants to become a manager	Inspire and provide exposure to skills needed for management. Provide the book Emotional Intelligence. Consider Stigliano?	3X per year / tbd	n/a	Tate and Kelli / Risk Council

# ADVANCED LEADERSHIP

## Objectives:

- Further inspire excellence with existing high performers
- Reinforce Metrcocare values and strategic pillars
- Connect departmental leadership to CEO and Executive Team

## Attendees:

Direct reports to Executive Team members

## Format

- Small groups divide and take one of three sections of The Culture Code by Daniel Coyle
- All participants receive the book
- Each group presents one time in the fiscal year

## Topics

- Build Safety
- Share Vulnerability
- Establish Purpose

# PATHWAYS

## Objectives:

- Cultivate ambitious high performers into future leaders
- Build a foundation of management and leadership skills BEFORE taking on the role
- Inspire and motivate employees

## Attendees:

Any employee currently NOT in a management position that wishes to participate

## Format

- In person and Virtual Trainings
- Conducted by Executive Leadership and TCRMF
- All participants receive the book "Emotional Intelligence" by Daniel Goleman

## Topics

- Lean Management and Leadership
- Managing Change
- Dealing with Difficult People
- Emotional Intelligence

"There is almost no limit to the potential of an organization that recruits good people, raises them up as leaders and continually develops them."

-John Maxwell

# MANAGEMENT 101

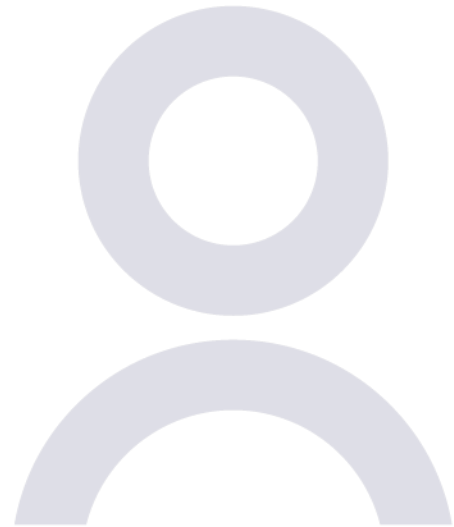


- **Difficult Conversations and PIPs**
- **HR Law for Managers**
- **Predictive Index**
- **Annual Review**

# Difficult Conversations and PIPS



- Guidance on difficult conversations
- Emphasis on the importance of documentation and consistent dialog



# HR Law for Managers



A refresher directly given by the counsel who will be handling grievances against the agency.



# Predictive Index

Ariana Guillford

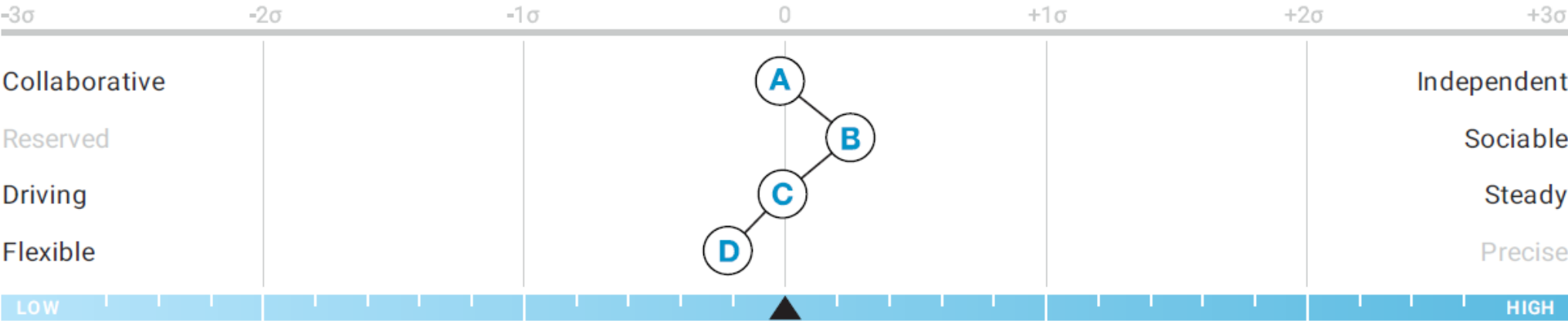
Assessment Date 12/13/2019  
Report Date 5/31/2024



Adapter

An Adapter is a bridge-builder, comfortable with changing situations.

Self



M: 32



# Predictive Index

PI INSIGHTS


## Management Strategy Guide

2024 May 31



### ARIANA GUILLFORD

People are complex. You should motivate and direct others based on their behavioral preferences. The following tips outline how your employee likes to be managed. **How are you doing?**

 Ariana is a Adapter.

An Adapter is a bridge-builder, comfortable with changing situations.

#### Strategies based on how Ariana interacts in the workplace:

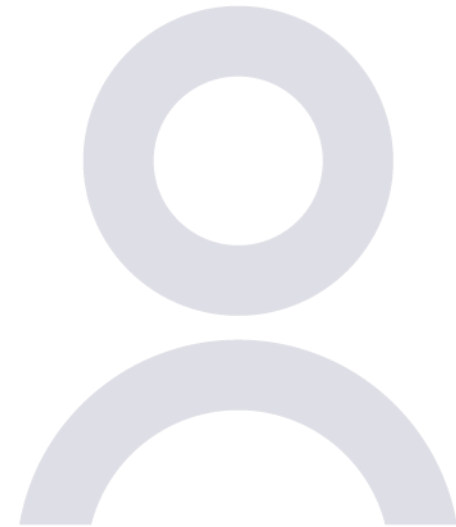
- ☐ Give them opportunities to solve problems by themselves and with others
- ☐ Provide a mix of technical and social communication activities
- ☐ Balance my communication style to include a mix of written and verbal approaches
- ☐ Provide positive reinforcement such as public or private recognition for a job well done

#### Strategies based on how Ariana takes action:

- ☐ Give them the opportunity to adjust their pace of work as necessary
- ☐ Provide them with constructive criticism when I have to correct or change their work
- ☐ Take time to listen to their point of view and acknowledge their input
- ☐ Provide them with a supportive work environment to act on their ideas

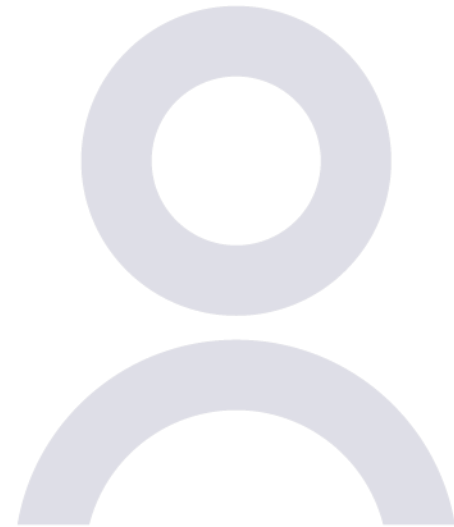
#### Strategies based on how Ariana deals with the risk and decision making:

- ☐ Provide them with an expert or more information when they are making a decision outside their area of expertise
- ☐ Help them identify what they need in order to move forward and take action
- ☐ Help them make decisions in new areas when they seem conflicted
- ☐ Engage them when a discussion is needed





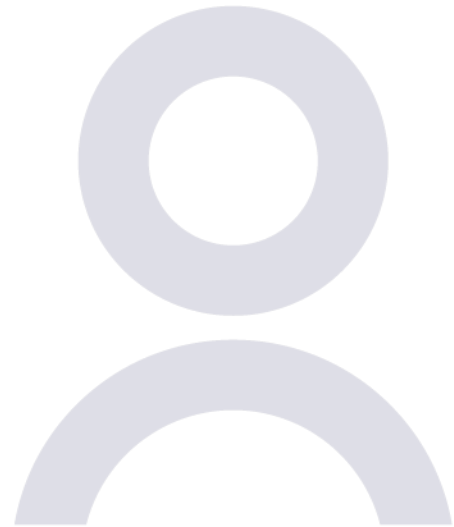
# Annual Review



# Upcoming Enhanced Training



Multi-Day, In Depth  
Training hosted  
monthly by HR Team  
including CEO to kick  
off the training



# CULTURAL ADVANCEMENT

Hosted Raven Solomon for *inaugural* Cultural Champions Summit

CULTURE CHAMPIONS  
Presents

Fall 2023

DEI  
*Summit*

November 3rd | 3pm - 4:30pm

*Featuring Raven Solomon*  
metrocare.





# Cultural Advancement

## *Identify & Celebrate ICON Days*



# What's Next for Cultural Advancement

## Culture Champions Plan

- *Identify* a new assessment that is culturally focused and inclusive our staff demographic assessment (annual)
- *Evaluate* and recommend actions for response to surveys
- *Continue* to support icon days
- *Develop* Employee Resource Groups (ERG's)
- *Plan* for the following year(s); with staff led initiatives

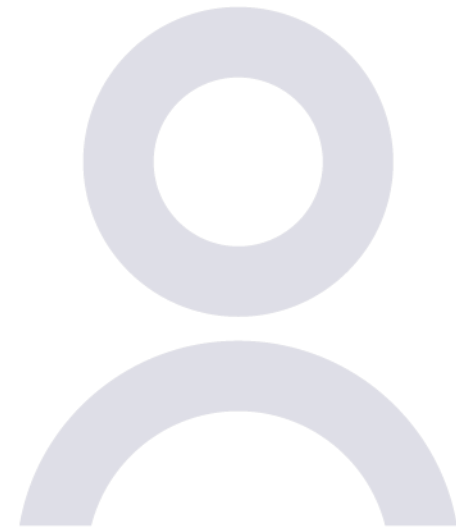
## Benefits to Developing Culture Advancement Initiative

- Empowered Culture Team to own the process
- Staff led; agency-wide engagement activities
- Inclusive work environment

## How It's Funded

- A significant portion has been funded through Philanthropy

Find **culture** here.



# Step 5 Making it Your Own

Find **leaders** here.

# Questions?

Tameka.Cass

Kelli.Laos

Ariana.Rosado

Tate.Ringer

metrocare.

@MetrocareServices.org

# Summary Worksheet

## **Step 1: KNOW YOUR HISTORY**

What have you tried?

What worked? Why?

What didn't? Why?

## **Step 2: UNDERSTAND AND DEVELOP YOUR CULTURE**

What is your culture?

If you aren't sure, how can you get a baseline?

How can you integrate belonging and culture into your leadership design?

## **Step 3: LISTEN TO YOUR WORKFORCE**

Engaged teams deliver higher performance and more productivity.

What have your past surveys told you?

How can you encourage participation in your survey?

How will you respond to the survey results?

## **Step 4: DATA DRIVEN DESIGN**

Consider qualitative and quantitative components.

What is your data telling you?

What data is missing for the complete picture?

## **Step 5: DEVELOP YOUR PROGRAM**

Create (and continuously improve) your model.

Know your budget.

Get senior level buy-in.

Find **leaders** here.