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Health Services
LOS ANGELES COUNTY

LOCAL 721
SEIU

A Partnership Model for
DHS LABOR MANAGEMENT COMMITTEES

PROGRAM DEVELOPMENT AND PROCESS GUIDE

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PROGRAM DEVELOPMENT & PROCESS GUIDE INTRODUCTION

What is this Guide?

This guide is intended to outline a process for effective implementation and sustainment of facility-based Labor Management Committees (LMCs) across the LA County Department of Health Services (DHS). All efforts outlined in this guide are intended to be undertaken in partnership between members of SEIU and DHS management. LMCs represent the most tangible form of partnership work, as Labor and Management come together to collaborate and create opportunities for meaningful, positive impact on the workforce and the patients we serve.

This information is designed for project participants, facility leadership, existing committee members, as well as on-site labor and DHS representatives involved in forming the Committee. The guide is organized into seven sections, each exploring a program component in enough depth to establish a new LMC or re-organize an existing committee. By following this outline, committees who meet monthly should be able to establish a committee working in partnership at the "Foundational Level" within six months (for more information, see Path to Performance, Appendix A, page 20).

What is the Partnership Model?

Working in Partnership means that LMCs bring employees and managers together as a team focused on collaborating in order to improve patient care and staff satisfaction. LMCs that are modeled in partnership help improve performance and ensure we provide the best service, quality, affordability and job satisfaction.

Working in partnership likely requires LMC members to transform their mindset with respect to the labor-management dynamic. A traditional labor-management dynamic often involves a transactional relationship that is characterized by a focus on competing interests. In this traditional approach to labor relations, there are only winners and losers. The partnership model advocates for a win-win outcome based on a relational approach and grounded in shared interests. Asking committees to work in a partnership mode requires significant training and support from both union and management leadership.

The information contained in this guide was developed in partnership, based on years of experience implementing Labor Management Committees throughout DHS. One of the primary goals of the LMC Project is to develop leaders among union members and management. By developing leaders in a collaborative, partnership-focused program, we contribute to a more

engaged and dynamic workforce that will contribute to DHS become the provider and employer of choice.

Labor Management Committee Program

MISSION AND SCOPE OF THE LABOR MANAGEMENT COMMITTEE

In a traditional LMC model, the scope of the committee is limited to labor-relations issues. Labor membership proposes an agenda and management members either "approve" or "reject" individual items on the proposed agenda. During meetings, labor membership voices concerns, while management membership provides information, debates the validity of the issue, or offers assurances that the issue will be addressed at some point in the future. Predictably, this transactional approach only serves to promote an adversarial relationship where progress is rare and fleeting. Furthermore, this approach creates a reactionary LMC, capable only of responding – most of the time ineffectively – to various crises.

Working in a partnership model, LMCs collaborate on proactive projects that create high impact, measurable, and sustainable change. The scope of the LMC's work includes, but is not limited to the following:

- Patient care quality improvement;
- Employee engagement and morale;
- Workforce and leadership development;
- Strategic planning and project initiatives;
- Facility-wide communication;
- Cooperative implementation of regulatory/legislative changes;
- Labor relations issues that can <u>best</u> be addressed within the committee.

While labor relations issues are not eliminated from the purview of the partnership LMC, they are deemphasized in favor of a proactive, project-based approach. An experienced, efficient LMC is able to identify which labor relations issues are relevant to the committee, and which issues are better addressed in a different venue. However, this is a learning process that requires growth within a supportive environment. Ultimately, the most effective LMCs provide critical support and insight into facility/unit/clinic applications, projects, and services. It is in this realm that LMCs have the most positive impact on a facility.

To ensure that each LMC adheres to the mission and scope outlined in this document, it is highly recommended that each committee create a mission statement early in the process. Instructions and coaching around authoring mission statements is provided in the introductory training to the LMC Program (see LMC Program Training, page 14).

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PROGRAM STRUCTURE

The following organizational chart illustrates a partnership approach to program structure. Note that for each program component, there is equal representation among management and labor participants. Given the challenges associated with adopting a partnership model, it is recommended that each

	High Desert	OVMC			LAC+USC					Rancho		Harbor	
Department Leadership: To provide support, oversight, and strategic vision for the entire LMC effort.	Steering Committee: Donna Nagaoka, Patricia Castillo, Gwendolyn Jones, Jose Gonzalez, Lydia Cabral												
Program Leaders: To link strategic vision with implementation of all program activities, including training, capacity building, assessment and evaluation.	SEIU Program Leader: Jose Gonzalez DHS Program Leader: Donna Nagaoka												
Sites Involved in Program:	High Desert	OVMC		LAC+USC						Rancho		Harbor	
Co-sponsors: To engage top site leadership, assess and evaluate committees, identify challenges, offer guidance, sustain membership.	TBD (May not be needed)	SEIU: _____ DHS: _____		SEIU: Jose Gonzalez DHS: _____						SEIU: _____ DHS: _____		SEIU: _____ DHS: _____	
Coaches: To provide hands-on support and mentoring to all LMC members, with a focus on moving each LMC along the Path to Performance.	TBD	TBD		TBD	TBD	TBD	TBD	TBD	TBD	TBD		TBD	
Co-Chairs: To facilitate LMC meetings, set goals, and foster collaboration at the site level.	General: Beryl & Cherri	General: TBD	RN: TBD	RN: Annie & Kelly	General: Cecil & Omega	Radiology Gabriel & Rashid	EVS: TBD	PFS (x2): Armine & Ada, Mark & Rosa	HIM: Cristina & Omega	General: Shawn & Rene	RN: Aries & Tiana	General: TBD	RN: TBD
Committee Members: Develop initiatives, work toward committee goals, communicate with constituents, etc.	Approx. 25 members	TBD	TBD	Approx. 12 members	Approx. 15 members	Approx. 10 members	TBD	PFS: Approx 12 members PAC: Approx 14 members	TBD	Approx. 15 members,	Approx. 10 members	TBD	TBD
Training Partners: Provide meaningful learning opportunities along with strategic coaching support when needed.	WERC (Tom Bailey & Tyler Anthony)												

component in the program be evaluated regularly and improved based on program need. Specific responsibilities of each program role can be found on the following pages. (Chart date: 4/15/2019)

Labor Management Committee Program

ROLES and RESPONSIBILITIES*

The roles and responsibilities listed below are not meant to be comprehensive. Rather, it is an attempt to provide an overview of each individual's contribution to the success of the program. As the program evolves, so too will the roles and responsibilities of those involved in the program. As such, the steering committee should review these roles on an annual basis and adjust accordingly.

LMC PROGRAM ROLE	KEY RESPONSIBILITIES	CANDIDATE ATTRIBUTES
LMC Steering Committee: This team of high-level stakeholders is responsible for providing leadership, vision and strategic direction for the LMC Program throughout DHS.	-Approve and oversee a strategic plan for the program -Ensure program is aligned with Department and Union priorities -Ensure appropriate resources and external support are available for all LMC-related activities -Provide guidance and oversight for the LMC Program Leaders -Engage with facility-level leadership (CEO or equivalent) when necessary to advocate for the LMC program	-A belief in and commitment to partnership as an indispensable approach to organizational development -A collaborative spirit -A passion for driving new initiatives and improvement work -The time to devote to an advisory role in a department-wide program (at least one meeting per month)
LMC Program Leaders: This team creates and implements the LMC Program Strategic plan throughout the department.	-Develop LMC Program Strategic Plan and ensure that all LMC Program activities are linked to it -Engage with facility-level leadership to advocate for the program and plan implementation -Responsible for recruiting and training program Co-Sponsors and overseeing their activities -Plan and manage all program assessment and evaluation activities -Help to determine overall training and other needs for individuals and groups within the program	-A belief in and commitment to partnership as a tool for organizational development -Ability to rally others to embrace partnership -Strategic planning and implementation skills -Experience evaluating groups and providing guidance and education when necessary -The time to devote to a hands-on leadership role in a department-wide program
Co-Sponsors: Co-Sponsors are facility-based leaders that are responsible for overseeing and sustaining the work of all the LMC groups at their respective facilities. (Two per facility)	-Recruiting, training and coaching committee Co-Chairs and team members -Periodically assess the progress of each committee relative to the LMC Path to Performance -Interface directly with facility leadership in order to link LMC activities to the facility's strategic priorities -Serve as role models for partnership work while advocating for the success and sustainment of all partnership activities	-A belief in and commitment to partnership as a tool for organizational development -Ability to inspire others to join in the work of partnership -The time to devote to a facility-wide effort to change the culture of labor-management relations -Leadership skills, including conflict management and problem-solving skills -Project management skills -Coaching and mentoring skills

LMC PROGRAM ROLE	KEY RESPONSIBILITIES	CANDIDATE ATTRIBUTES
Coaches: LMC Coaches are responsible primarily for the development of the committee by supporting the individual development of each committee member. The role of coach is typically reserved for Employee Relations staff and Worksite Organizers. (Two per committee)	-Participate in all committee meetings as a mentor and coach, with a focus on the committee's overall development -Bring a development perspective to the committee's work – framing all challenges as an opportunity for learning and growth -Focus the committee on making progress along the Path to Performance -Mentor individuals with a special focus on leadership skills -Periodically assess the progress of each committee relative to the LMC Path to Performance	-A belief in and commitment to partnership as a tool for organizational development -Leadership skills, including the ability to inspire and support others -Ability to facilitate learning for small groups as well as individuals -Ability to identify leadership potential and interest in developing another individual's leadership skills -Motivational coaching skills
Co-Chairs: Co-chairs are primarily responsible for leading the activities of their respective LMC groups on a week-to-week basis. While Co-chairs may start off directing the work of the LMC, as committees become more effective, the role of the Co-chairs transitions to facilitation. The co-chair's role evolves as the committee gains skills and effectiveness. (Two per committee)	-Create committee agendas (in partnership) -Facilitate committee meetings -Foster collaboration and partnership among all members of the LMC -Ensure the committee is progressing towards its goals -Communicate regularly with all LMC stakeholders, offering a positive, affirming vision for the LMC -Manage and resolve conflicts in a way that creates trust and openness -Drive committee projects forward through organization, support and collective accountability -Recognize committee deficits and request support when needed -Support the work of the LMC by advocating for the time and resources needed to have an impact -Commit to the work of the LMC for at least one year	-Facilitation skills, with an emphasis on engaging all individuals within a collaborative -Leadership skills, including the ability to inspire and support others -Demonstrated ability and willingness to work in a partnership mode -Demonstrated ability to adapt to change -Comfortable managing conflict, defusing tension and responding to strong emotions in a group setting -Organization, communication and active listening skills -Project management skills -Coaching and mentoring skills
LMC Members: LMC members, both union and management, are responsible for recognizing and surfacing important challenges for the committees to address. In addition, they are actively involved in finding solutions or developing improvement projects to address challenges. Finally, they are responsible for implementing solutions or improvement projects on behalf of the committee.	-Actively and regularly communicate with all colleagues in his/her unit in order to understand the most important challenges faced and express committee messaging -Represent the interests of colleagues in his/her unit or area on the committee -Using a partnership approach, develop innovative approaches for resolving issues or overcoming challenges that are impacting a large number of colleagues -Employ the tools of partnership to advance the committee's goals -Support the work of the LMC by advocating for the time and resources needed to have a meaningful impact -Commit to the work of the LMC for at least one year	-Ability and willingness to represent others' perspectives, interests and views -Commitment to a partnership approach to problem solving -Communication skills, including the ability to express complex ideas in a straightforward way -Enthusiasm for innovation in their work -Willingness to contribute to a collaborative approach to project-based work -Active listening skills -Ability and willingness to work through conflict and disagreement toward solutions

*NOTE: All LMC roles are undertaken in a "partnership" mode, where responsibilities are shared among members of the union and management. More detailed descriptions of roles and responsibilities can be found in the LMC Introductory Workshop curriculum.

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PROGRAM PLANNING AND FOUNDATIONS

STRATEGIC PLANNING

An LMC Program Strategic Plan, explicitly connected to global DHS and SEIU strategic priorities, is necessary for the success and sustainability of the program. The LMC Program Leaders, with support from the LMC Steering Committee, are responsible for developing and implementing a Program Strategic Plan that outlines program goals, objectives and strategies. A well-crafted strategic plan ensures alignment among all LMC activities and expresses the ongoing strategic value of the LMC program to all stakeholders.

A useful guide to strategic planning can be found [here](#).

PROGRAM FOUNDATIONS

While a successful LMC Program is guided by strategic priorities, it requires a solid foundation of on-site preparation that includes leadership engagement, the formation of a planning committee, and committee logistics. Each of these components need to be addressed in partnership.

LEADERSHIP ENGAGEMENT - Discussions and engagement with the highest level of on-site leadership is critical to the success of any new program. With partnership work, leadership engagement is even more important. Before the implementation of an LMC Program at a new site, Program Leaders are responsible for "making the case" for the program through a strategic discussion with top management and union officials.

The Program Strategic Plan can be used as a tool to link LMC activities to the global DHS/SEIU goals and ultimately the goals of site leadership (both labor and management). Communication with top leadership is an ongoing effort, and Program Leaders should develop a regular "check-in" process with on-site leaders (including LMC Co-Sponsors) to keep all stakeholders informed and engaged in the ongoing work.

FORMATION OF A PLANNING COMMITTEE - It is recommended that a planning committee be formed in the months prior to program launch at a facility. Persons engaged should include members of management (CEO/CNO), facility liaisons, labor worksite organizers or representatives, employee relations, on-site Human Resources, Health Transformation

Advocates and trainers from Worker Education & Resource Center (WERC). The planning committee's responsibilities include:

- Planning, Scheduling, Research – Determining need, identifying classifications for representation, cataloging service areas/units/department participants, outlining timelines for recruitment and training.

- Recruitment of Co-Sponsors and Coaches – The Planning Committee, with the advisement of the LMC Program Leaders, are responsible for recruiting LMC Co-Sponsors who will serve as on-site leaders for the program. Once Co-Sponsors have been identified, they can assist with the recruitment of LMC co-chairs and members (See "Forming the Committee," below).

- Vetting Prospective Members – Prospective committee members should demonstrate a level of excitement and interest in collaboration and improvement work. Ideal members will share the visions and values of the department and facility (see Roles and Responsibilities chart, page 5). Experience has shown that the most vocal or passionate voices don't always make the most effective committee members. Members with a commitment to collaboration and interest in creative problem solving are typically the ones who contribute to and gain the most from the LMC experience.

- *Note on recruitment*: Recruitment of committee members needs to be completed in partnership, with a focus on organizing a group of committee members that have the *greatest potential to be effective in a partnership mode*. Each planning committee should determine the recruitment and selection process that will work best for each individual group. It is NOT best practice for labor and management to unilaterally determine committee members representing their respective sides. One alternative approach is that each side proposes a list of potential members, and the planning committee determines the composition of the group through the consensus process.

COMMITTEE LOGISTICS - The early success of a committee rests largely on consistent member participation, especially when the culture of partnership is just beginning to take root at a facility. Co-sponsors may need to exert significant energy into solidifying logistics such as meeting time, meeting place and the release process. Best practices suggest that an annual calendar of all meetings (including relevant pre-meetings) be issued to all parties impacted by LMC work. Subsequently, individual releases should be sent no fewer than two weeks in advance of each meeting to allow time for managers to adjust schedules (some facilities require a minimum of four weeks).

NOTE: LMC members need to take personal responsibility for communicating their LMC commitments to their supervisors and managers. Members should proactively seek releases from their managers or supervisors and not simply rely on directives from Employee Relations or others for their LMC-related releases.

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PROGRAM IMPLEMENTATION

Below, find a sample LMC Committee "Install" process. Note that starting or re-constituting a committee usually unfolds over a period of months. Project phases include leadership engagement, planning, recruitment, training, coaching and assessment. This "Install" process can be adapted to suit the needs of your group. However, it's important that all of the steps outlined below are fully executed.

Labor Management Committee Training Plan

Goal: To cultivate highly effective LMCs by establishing an inclusive committee process that is productive, efficient and responsive.

Objectives: To recruit and train staff in forming a Labor Management Committee based on a model of partnership. Involving front-line staff and management.

	Activities	June	July	August	August	August	Sept	October	April	July
Phase 1	• Leadership engagement • ID areas • One-on-Ones	X	X							
Phase 2	• Planning • Scheduling • Research			X						
Phase 3	• Recruit staff and management members • ID co-chairs				X	X				
Phase 3	• Review • Revisit • Schedule training dates					X				
Phase 4	• Partnership 101 Training • WERC Introduction						X			
Phase 5	• WERC LMC Workshop (one or two sessions – 6 total hours)						X			
Phase 6	• LMC Practicum (first LMC meeting) • WERC Coaching							X		
Phase 7	• WERC Post-training assessment • WERC Refresher								X	
Phase 8	• LMC skill development - TBC									X

LMC Planning Committee (LMTC LMC; ER; SEIU; Admin)

WERC Staff

FORMING THE COMMITTEE

When forming the committee, every effort should be made to be as inclusive as possible with respect to the diversity of staff and management involved. Whenever possible, members should be representative of all job categories within the identified group. For example, in a general LMC, effort should be made to include workforce members from every facet of the organization (clerical, nursing, pharmacy, radiology, EVS, etc.). Note that in some cases, nursing will have a separate LMC. In these cases, recruiting nurses from various areas and shifts is recommended.

RECRUITMENT OF COMMITTEE MEMBERS – As with all activities, recruitment should be done in partnership. It is vitally important that recruitment be undertaken with care: *prospective members should be screened in order to determine if they have the necessary personal attributes and basic skills to be an effective committee member. For a list of committee member attributes, see Roles and Responsibilities, (page 5). While prospective members don't need to have advanced skills, a positive attitude and enthusiastic outlook on partnership is critical.*

Staff and Management recruitment is conducted facility-wide and usually accomplished over the course of several days of outreach. Planning Committee activities include identifying recruitment strategies, engaging and informing staff of the program, and targeting areas that have not been traditionally included in the LMC program (i.e. facilities management, EVS, supply chain).

When determining the management members who will serve on the committee, it is important to include someone with authority or delegated authority. The authority to help implement complex initiatives or help lead facility-wide projects is of critical importance.

The current practice for member appointment in the RN LMCs is through a nominating process. Each classification/service/department nominates 2-3 prospective nurses, and the two top nominees are awarded positions on the committee – one primary and one alternate (assuming they have the capacity to serve).

IDENTIFYING LMC CO-CHAIRS – The partnership model requires that each committee be co-chaired by one member of management and one member of labor. They serve as equal partners, responsible for setting agendas, motivating members, facilitating meetings, and overseeing committee projects. The identification of suitable co-chairs is one of the most important contributing factors for committee success (see Roles and Responsibilities chart, page 5). Co-chairs are exposed to additional leadership development training as part of their LMC training experience.

GUIDING PRINCIPLES FOR CO-CHAIRS – The following principles are based on years of experience leading committees throughout DHS and are fleshed out in leadership development training.

Principle #1: Take advantage of the diversity of the group. Rather than attempt to minimize the impact of divergent perspectives, treat it as a constructive source.

Principle #2: Make a commitment to effective listening. Co-chairs have a responsibility to model exemplary behavior. When co-chairs employ active listening skills, participants feel respected and understood. In turn, they become more willing to listen to others who may have different perspectives.

Principle #3: Manage the group's energy by providing a mixture of structured activities. For example, working in small groups, brainstorming activities, individual writing, and round robins.

Principle #4: When appropriate, make major committee decisions using a consensus model. Building sustainable agreements resides in balancing the reality of hierarchical authority with the demands of equal voice and sharing of power within the LMC. This requirement for meaningful endorsement by every individual stakeholder is the essence of group decision-making.

COMMITTEE MAKEUP

Labor Management Committees should strive for parity in representation: a near equal number of employee and management representatives. The number of committee members should be large enough to represent all relevant areas and shifts of the facility. In the General LMC where there is more than one bargaining unit, it is the intention to include representatives from each on the committee. At the same time, the committee should be small enough to permit a productive working atmosphere. A committee of larger than 30 is not recommended, though a highly functioning committee with a proven track record could increase its membership to higher numbers if necessary.

ALTERNATE MEMBERS - To ensure consistent representation at all committee meetings, alternates should be appointed to act during the absence of regular members. In order for the alternate to make useful contributions, the regular member should keep him/her fully briefed at all times on committee activities. When new regular members are recruited from the ranks of alternates, the experience and continuity of the committee is maintained.

TENURE – Committee leadership (co-sponsors and co-chairs) should discuss the general guidelines regarding the length of tenure for all members. A proposal should be made to the

full committee regarding tenure that all members can comment on and approve. Rotating members regularly will expose more workforce members to facility initiatives. However, due to the critical importance of committee continuity, it is recommended that committee members commit to no less than 12 months of service. Successful rotation of members could be accomplished by staggering starting and ending dates of service on the committee.

COMMITTEE PROJECTS

There are various approaches to an issue or challenge, and it's important to keep all projects within scope of the committee's responsibility. Based on size and scope of project, several options are available to the committee in approaching solutions. One method advocated in the partnership model is empowering the committee members and front-line staff in forming a subcommittee around the project, allocating staff time and available resources in research, and recommending and implementing solutions. It is recommended that committees start with an issue that is relatively easy to resolve and which has immediate effects on the workforce. The most efficient way to bolster a committee's reputation is to deal effectively with concerns that impact employees and services provided.

SUB-COMMITTEES - Depending on the goals of the committee, the of membership and other factors, there may be a need to form sub-committees at various times to address specific tasks. Members chosen to serve on sub-committees should have particular experience and/or interest. When formed, these subcommittees should report back to the main committee, enabling it to carry on its primary tasks. Co-chairs will be responsible for ensuring sub-committee members are allocated appropriate time and resources to accomplish tasks.

AVAILABLE RESOURCES - If your committee doesn't include members who can implement all recommendations, Subject Matter Experts from the facility or (if needed) within DHS are available to include on project initiatives. Present them with the research and facts that have been gathered to support the committee's work. Be creative when identifying supports outside the committee who can partner with projects.

COMMITTEE MEETINGS

Committees should meet on a regular basis, and it is recommended that meetings take place at least monthly. However, it may be necessary to meet more often, especially when a new committee has been formed, or when sub-committee projects dictate more facetime. A committee that doesn't meet on a regular basis is at risk for losing momentum. For the convenience of committee members, meeting dates for the entire year should be set up in advance and a calendar circulated to everyone within the facility.

Committee members should agree on a regular time to meet. Ideally, meetings should be held during the day with provisions made to compensate non-day shift employees who serve on the committee. Whatever time is chosen, it should be the same for each meeting to promote attendance.

Like all important, well-organized meetings, those of the LMC should start promptly at the designated time. Since committee members have other duties to perform, meetings should also end at the scheduled time.

Once the time and dates are set, meetings should not be postponed (except for emergency reasons). Frequently postponed meetings will erode the effectiveness of the committee and will support the belief among employees that the LMC and its work lack importance and urgency.

ATTENDANCE - The committee should strive for 100% attendance, an achievable goal when alternates have been designated to represent committee members unable to attend. Low attendance leaves segments of the workforce without representation, disrupts the continuity of committee activities and indicates a lack of commitment.

AGENDAS – LMC agendas are prepared in partnership, with co-chairs determining which items will appear on the agenda for each meeting. Agendas prepared and distributed well in advance of the meeting (at least one week) help prepare committee members for the discussions. This preparation allows members to discuss topics with employees beforehand and to gather information about agenda items.

NEW BUSINESS - Routine committee activities, such as surveys, recommendations and records review will generate issues for discussion. In addition, all employees should be encouraged to submit unresolved issues to their committee representative for inclusion on the agenda. To assist the committee in addressing all pertinent issues within the limited time available, items are screened by committee co-chairs before they are addressed by the entire committee.

CONDUCT - The use of a detailed agenda will assist in ensuring that committee meetings proceed in an orderly manner, but there are other considerations as well. The tone and conduct of meetings are often an accurate reflection of the way the committee operates generally. In a traditional LMC dynamic, labor members voice a list of concerns or issues that management is expected to address. In the partnership model, meetings are not used as a forum for airing general complaints and grievances. It is a place where issues are resolved jointly through dialogues and collaboration.

It is not solely the responsibility of management members of the committee to "get things done." It is everyone's responsibility. Just as every member of the committee has equal standing, every member is responsible for the progress and success of the group.

Although disagreements are to be expected on some issues, they should be resolved in a non-adversarial atmosphere based on known facts and logical thinking. Committees should strive to identify shared interests that can lead to reasonable recommendations and solutions. While coaches have a critical role to play in creating the conditions for true collaboration, they should recognize that challenges will present themselves. Incremental growth along these lines should be viewed as success.

MINUTES - The basic reason for keeping minutes of LMC meetings is to chronicle the committee's work and record progress on projects and initiatives. It isn't necessary to take verbatim notes of each discussion. Rather, major points should be summarized. Even though minutes are recorded, committee members may wish to take their own notes during the meeting for future reference.

It is highly recommended that minutes be promptly distributed for all employees to read. This helps educate employees about the work of the committee. In addition, committee members should construct a brief set of "talking points" that they can share with their co-workers about the committee's progress. When all committee members speak with one voice, their message is amplified, and their efforts become more effective.

COMMUNICATION - An effective committee interacts frequently with the workforce. When the workforce is involved and informed, it can participate as empowered and active partners rather than passive bystanders. The committee should jointly discuss the methods of communication most effective in the workplace. Both written and verbal communications help insure that information reaches the workforce. It's a good idea to utilize methods used at the facility to distribute information in use to illicit feedback and/or report the committee's activities and events. Whatever methods are used, be sure to encourage workers' questions and suggestions.

From the very beginning, it is recommended that the committee establish formal and informal avenues for feedback. This helps the workforce to understand that the LMC cannot be effective without worker awareness and participation. This procedure will take some time and effort to develop, depending on the complexity of your organization.

ONLINE PRESENCE - Each committee should have an online environment to communicate internally with members and externally to constituents. It is important to document and distribute work by the committee, maintaining transparency in committee efforts and offering a forum to obtain feedback and suggestions from staff.

Labor Management Committee Program

PROGRAM TRAINING

Given the transformative nature of the Partnership LMC Model, member training is a critical component in starting and sustaining an LMC program. **All members of the LMC should undergo introductory training and be exposed to ongoing training as needed**. Only when all members have a mutual understanding of the partnership model and its expectations can the group move forward in unison.

The following chart outlines the LMC Program training components and how they should be implemented. These training components are not static. Rather, they should be updated regularly and supplemented as the needs of the program require. (Program components below updated on 4/15/2019. Trainings highlighted in **BLUE** are forthcoming).

Training Title	Training Objectives	Primary Training Audience	Training Provider	Notes	Current Status
'Partnership 101' (60-90 mins)	-Describe the DHS-SEIU "Partnership" -Explain how the "Partnership" benefits both sides of the L-M dynamic -Identify all "Partnership" related projects throughout DHS -Discuss how "Partnership" is driving culture change in DHS	-All leadership and members of the LMC Program	-TBD, needs to be delivered in partnership mode	[As of 2019, a new version of this training is being developed by WERC] -Training can be combined with the 'Introductory' training (see below)
'Leadership Development Training' (7 hrs.)	-Examine how a commitment to partnership and collaboration impacts the work of the LMC; -Practice creating an inclusive committee process by employing effective facilitation skills; -Develop relevant emotional intelligence skills like building rapport, expressing empathy and developing positive working relationships among LMC members; -Demonstrate effective communication skills for leaders.	-All LMC leadership, including Co-sponsors, Co-chairs and Coaches -Regular LMC members (non-leaders) do not attend	-As of 2019, WERC provides this training	-This training should come before any training, with the possible exception of 'Partnership 101' -This training aligns with other leadership development training throughout DHS
'LMC Introductory Workshop: Navigating Change through Partnership' (7 hrs.)	-Examine how a commitment to partnership impacts the work of the LMC; -Recognize common barriers to teamwork and discuss a more collaborative process;	-All leadership and members of the LMC Program -All new LMC members must	-As of 2019, WERC provides this training component	-Can be combined with 'Partnership 101.' -After initial training, new committees need additional coaching, usually provided during

Training Title	Training Objectives	Primary Training Audience	Training Provider	Notes	Current Status
	-Review best practices for committee organization and communication; -Demonstrate interest-based problem solving and decision making through consensus.	receive this training		first two LMC meetings. WERC provides this coaching component.
'LMC Excellence Track' (LMC Workshops 2.0) (7 hrs.)	-Multiple modules in training "Track." Topics include: -Committee Excellence: Setting a goal for the committee's progress and a plan to get there; -Committee Communications: communications mapping, speaking with one voice and project management communications; -Continuous Improvement 101: Process Improvement principles for partnership work; -Emotional Intelligence for Committees: conflict management, giving and receiving constructive feedback.	-All LMC members -<u>Prerequisite</u>: LMC group must be functioning at "Transitional LMC" (Level 3 on Path to Performance) in order to engage in these training modules	-WERC	-Forthcoming, Q2 2019 -Start with 4-5 total modules, with each module consisting of 90 - 120 minutes of training content -Committees would determine, along with their co-sponsors and coaches, which modules would be most beneficial
'LMC Coaching Seminar' (7-8 hr.)	-Recognize group strengths and deficits and provide support and guidance to promote committee growth -Identify areas of individual need through formal and informal skills assessments -Employ motivational coaching techniques to support all LMC members in improving performance -Contribute to the development of leadership competencies among LMC co-chairs	-LMC Coaches (usually Employee Relations staff and Worksite Organizers) -LMC Co-sponsors (optional)	-As of 2019, WERC is slated to provide this training component	-Training forthcoming, Q3 2019 -All coaches need to have completed other required training components to attend this training -Coaches also receive ongoing support from Co-sponsors and trainers
LMC Advanced Leadership Development (TBD)	-[TBD], multiple topics in training level. Topics include: -Advanced Process Improvement -Coaching and Mentoring skills	-LMC Co-chairs, Co-sponsors and Coaches	-TBD	-Training forthcoming; planned for FY2020-21

NOTE ON LEADERSHIP TRAINING – Since one of the primary goals of the LMC Program is to develop leaders, introductory leadership training is critical to the success of the committees. Special attention should be paid to supporting Co-Sponsors and Co-Chairs throughout their involvement in the program. Best practices suggest that all leaders, no matter the amount of previous experience or skill level, need substantial support within the first 4-6 months of program launch. Adapting to a partnership approach to committee work is a difficult transition that challenges even the most seasoned leaders.

NOTES ON INTRODUCTORY COMMITTEE TRAINING & COACHING – Working in a partnership model involves a multi-step learning process that requires coaching and leadership support.

- "Partnership 101" Component – All LMC Members should be exposed to this training as a pre-requisite for the LMC Introductory Workshop. This training, facilitated in a partnership mode, covers the Who, What, When, Where and Why of partnership work, and forms the foundation for all training activities that follow.

- Introductory Training – A full-day "Labor Management Committee Introductory Workshop" training is a required training component for all LMC members. Whenever possible, members of the same committee should attend the training together. The goal of the training and subsequent coaching is to have committees progress to level three of the Path to Performance (see Appendix A, page 20).

- Introductory and Ongoing Coaching – After all members have completed the initial training components, each committee will have the support of program coaches as well as outside educators to guide groups through the process of learning and growth. At minimum, each committee will need intensive hands-on coaching for the first six months of its work. During this time, coaching responsibilities are shared among LMC Coaches, Co-sponsors, and WERC Educators.

  At the end of six months, each committee completes a series of assessments and evaluations to determine support and education needs. Ongoing coaching is provided by Program Coaches. From time to time, as training interventions are brought online, periods of more intensive coaching may be necessary.

Labor Management Committee Program

PROGRAM ASSESSMENT and EVALUATION

Ongoing program assessment and evaluation are essential in establishing effective LMCs across the department. Note that assessments and evaluation are all completed in a partnership mode, and that assessment is used as an opportunity for committee and individual growth and learning. Assessment and evaluation activities unfold along three parallel paths: at the individual level, at the committee level and at the program level.

COMMITTEE-LEVEL ASSESSMENT

All committees are assessed periodically according to the LMC Path to Performance (see Appendix A, page 20). The Path to Performance outlines a set of performance dimensions and describes committee attributes across five levels of effectiveness.

Each committee should evaluate itself no less than once per year, and ideally every six months. However, committees should not assess themselves according to the Path to Performance until they reach level three (transitional LMC). Before that point, committees should conduct self-assessments (see 6-month Committee Self-Assessment, Appendix F, page 25), while Co-sponsors and Coaches assess the group via the Path to Performance. This is to prevent groups from becoming overwhelmed with the high (but reasonable) expectations outlined in the performance model.

The Path to Performance assists program leaders in determining what training and support resources are needed for each committee. It is composed of five performance levels:

Level 1: Pre-partnership LMC
All groups begin at level one, before the group has received any training or formal support. At the same time, facility leaders have been engaged, and the groundwork has been laid. Committee members have been identified, but the tools are not in use, and the approach to committee work is traditional, not using the partnership model.

Level 2: Foundational LMC
Most groups are able to move to level two within the first few months of operation. Level two groups have trained all committee members and begun using partnership tools.

Level 3: Transitional LMC
Groups who are operating at level three have effectively integrated most of the basic partnership tools and ideas into their work. Most level three groups are ready for the "LMC

Excellence" trainings. (Committees operating below level three should not participate in LMC Excellence" trainings until they have reached level three).

Level 4: Operational LMC

Committees who have attained level four are considered fully "operational." They no longer require daily/weekly involvement from Co-sponsors or Coaches (though these parties are still providing support). Level four groups turn their focus to Continuous Improvement work, with project outcomes that can be tracked using data.

Level 5: High-Performing LMC

All committees should strive to become level five LMCs. High-Performing committees are entirely self-sustaining. Members are highly trained, and leaders have been fully developed within the scope of the committee. New members are seamlessly integrated into the group, and progress on initiatives is consistent.

INDIVIDUAL-LEVEL ASSESSMENT

In addition to committee assessments, individual committee members should be assessed according to the individual competencies necessary to fulfill their roles as committee members. For more information, see Leadership Core Competencies (Appendix B, page 21 and Member Core Competencies, Appendix C, page 22). This self-assessment process is strengths-based and focused on individual learning and growth.

- **Co-chairs** complete a self-assessment no less than twice per year (see Co-Chair Self-Assessment, Appendix D, page 23). This assessment should be completed with Coaches and Co-Sponsors, and all parties should approach the assessment with a leadership development mindset.

- **Committee members** complete a self-assessment no less than once per year (see Committee Member Self-assessment, Appendix E, page 24). The assessment is completed in conjunction with LMC Coaches and also serves as a goal-setting session.

PROGRAM-LEVEL ASSESSMENT + EVALUATION

At least once each year, the Steering Committee, in conjunction with the Program Leaders, complete a formal evaluation of the LMC Program. The evaluation should consist of a comprehensive set of data, both qualitative and quantitative, that indicate the progress of each committee.

The Path to Performance Calculator (digital file, Excel format) has been developed to aid in collecting and aggregating this data. Using the Path to Performance calculator and combining it with other qualitative data, Program Leaders and the Steering Committee evaluate the overall effectiveness of the LMC Program and all of its component parts. The Steering Committee uses this data to inform its strategic priorities and provide meaningful direction and an inspiring vision for all program participants.

Note that the Path to Performance represents the principle of continuous improvement within the LMC Program. The improvement goal of the program is that each committee make continuous progress upward through the Path to Performance levels. Progress through the Path to Performance requires a commitment to supporting each committee with the resources, training, and leadership necessary for success.

APPENDIX A: LMC Path to Performance

Dimension	Level 1: Pre-partnership LMC	Level 2: Foundational LMC	Level 3: Transitional LMC	Level 4: Operational LMC	Level 5: High-Performing LMC
Sponsorship	* LMC Co-Sponsors (Union Rep. & Mgmt. Representative) have been identified and received introductory LMC training ("LMC 101")	* Sponsor agreement completed * Sponsors have established communication channels to co-chairs and each other	* Sponsors regularly communicate with co-chairs, offering support and guidance at least once per month * Sponsors recognize and encourage committee efforts and successes	* Sponsors continue regular communications with co-chairs, and conduct bi-annual assessments of each committee with co-chairs	* Co-sponsors are active in assessment and evaluation of LMC, providing support whenever necessary and reporting back to LMC Program Leadership
Leadership	* LMC Co-chairs have been identified * Union and Management site leadership have committed to the LMC project	* LMC Charter (or mission statement) completed * Co-chairs have begun forming a working relationship and are sharing responsibilities	* Co-chairs are seen by committee members as jointly leading the committee * LMC Coaches have begun supporting individual member growth	* Co-chairs are held jointly accountable for performance by sponsors and executive leadership * Trust has been built to such an extent that either co-chair can lead meetings in the other's absence * LMC Coaches have provided significant support to members; both committee growth and personal growth is apparent * Coaches are able to offer support for CI initiatives	* Committee beginning to operate as a "self-managed group," with most day-to-day decisions made by members (not co-chairs) * Coaches can focus most of their energy on new members of the committee, who need the most support
Committee Process	* Traditional; not much change evident * Committee meetings and pre-meetings occur irregularly * Co-chairs direct all or most committee activities or rely on coaches to do so	* Committee meetings and pre-meetings are scheduled and occur regularly * Co-chairs are directing most committee activities, without substantial coaching support * Some struggle determining committee agenda items	* Meetings are outcome-based; committee members are participating actively and contributing to progress and decision-making * Co-chairs moving from direction to facilitation	* Committee members are able to complete tasks in between meetings when necessary * Co-chairs are clear about the committee's mandate and creates agendas based on issues the committee can effectively address * Committee collects own data and reviews to see whether changes are helping improve their facility	* Committee culture allows members to respond to challenges quickly * Committee is able to measure results of their work and apply lessons learned
Committee Member Engagement	* Minimal engagement from committee members * Incomplete representation (several units or areas not represented)	* Committee members understand and are using the basic principles of partnership * Committee has established a communication structure to reach all constituents	* Committee effectively uses communication structure to reach most constituents * Committee has partial representation from most units or areas * At least half of committee members can articulate what the committee is doing and why	* Large majority of committee members can articulate the purpose of the LMC and the impact it is having * Committee meetings are focused mostly on project-based work	* Committee members can connect LMC activities to larger goals of Department and Union * Full transparency of information; fully functioning communication structure * Full representation from all constituent groups, well established and effective communication structure to all constituents
Training	* No training in the LMC "Partnership Model" for any LMC members	* All LMC members trained in the "LMC Introductory Workshop" * All Co-sponsors, Co-chairs and Coaches have completed the LMC Leadership Development Training	* LMC Coaches have completed the LMC Coaching Seminar * Some new LMC members are trained at relatively soon after joining the LMC	* Coaches and Co-sponsors are able to identify areas where more LMC training is needed * All LMC members have taken Continuous Improvement training and are familiar with the basic principles of Continuous Improvement * All LMC members have participated in at least one additional "LMC Excellence" training (besides CI) * Most new members are trained within a few months of becoming an LMC member	* All LMC Members have participated in at least three "LMC Excellence" trainings (including CI) * All new members are trained on an ongoing basis * Members, Co-chairs, Co-Sponsors and Coaches identify and help implement focus-area specific training when needed
Use of Tools	* Not in use	* Committee has begun using organization and communications tools, and clear roles have been defined * Committee has been introduced to the LMC intranet site	* Committee members understand and use partnership tools (i.e. interest-based problem solving, project planning) * Committee has begun documenting projects, sharing lessons learned, and actively using the LMC intranet site	* Committee is able to use Continuous Improvement (CI) principles in most of its project-based work * Committee has integrated the LMC intranet site into its communications and project management work * Coaches provide only limited support in using tools, as the group is largely self-sufficient in this area	* Committee has integrated a Continuous Improvement approach to their work * Committee has identified new tools to aid in their work
Goals & Performance	* Committee does not yet have goals * Project-based work is not occurring	* Co-chairs present potential project ideas and are able push some projects forward to completion	* Committee has completed at least one project-based initiative * Committee has contributed to the knowledge base of the department by sharing its successes	* Committee has completed at least three project-based initiatives, demonstrating the principles of Continuous Improvement in at least one of them	* Committee has completed at least five project-based initiatives * Committee has collected and analyzed data and used the data to drive at least one initiative

APPENDIX B: LMC Leadership Competencies for Co-chairs

	LMC Leadership Core Skill	LMC Leadership Sub Skills	
1	Partnership-related Skills	a. Ability to articulate the benefits and challenges of working in partnership b. Ability to collaborate and instill trust in a partnership context c. Ability to listen actively, especially to those positioned on the "other side" of the labor-management dynamic d. Ability to identify and utilize common interests when solving problems	BASIC SKILLS
2	Committee Organizational Skills for Leaders	a. Ability to create relevant committee agendas that effectively address the committee's ongoing work b. Ability to develop a basic work plan with a clear goal and delegate responsibilities for related action items c. Ability to facilitate inclusive committee meetings in a way that actively engages all members d. Ability to facilitate a consensus decision-making process for important committee decisions	BASIC SKILLS
3	Communication Skills	a. Ability to communicate using plain and clear language in a committee setting b. Ability to communicate with respect and clarity to all sides within the labor-management dynamic c. Ability to articulate a positive, inspirational vision for the committee as well as a path toward achieving that vision d. Ability to facilitate open communication during committee meetings	BASIC SKILLS
4	Interpersonal and Relationship-Building Skills	a. Ability to build rapport, practice empathy and develop working relationships with all committee members, regardless of their position in the labor-management dynamic b. Ability to practice humility and receive feedback with an open mind c. Ability to manage conflict and adversity within a partnership context d. Ability to drive engagement and motivate others to embrace a partnership approach to the work	BASIC SKILLS
5	Coaching and Mentoring	a. Ability to support learning and growth of all committee members, regardless of their place in the labor-management dynamic b. Ability to provide constructive feedback using the ask-tell-ask model c. Ability to utilize motivational coaching with LMC members (GROW model) d. Ability to share responsibility and empower others to meaningfully contribute to the committee's work	ADVANCED SKILLS
6	Continuous Improvement & Advanced Project Management	a. Ability to identify improvement opportunities relevant to the work of the committee and lead the committee to develop innovative solutions b. Ability to apply the principles of continuous improvement to the committee's work, including the collection and analyzation of relevant data c. Ability to utilize basic continuous improvement tools such as a PDSA planner and SMART goals to develop an improvement project plan d. Ability to oversee and troubleshoot continuous improvement projects related to committee initiatives	ADVANCED SKILLS

* Note that ADVANCED SKILLS are addressed in ADVANCED Leadership Development Training, targeted for FY2020-21

APPENDIX C: LMC Competencies for Committee Members

	LMC Member Core Skill	LMC Member Sub-skills	
1	Partnership-related Skills *Addressed in LMC introductory Workshop*	a. Ability to describe partnership and recognize the importance of a partnership approach to the committee's work b. Ability to set aside personally relevant issues when necessary in order to address more global/universal challenges that the committee is focusing on c. Ability and willingness to collaborate with all committee members, regardless of their position in the labor-management dynamic	BASIC SKILLS
2	Committee Organization Skills *Addressed in LMC introductory Workshop*	a. Ability to contribute to and manage committee agendas, minutes, and official communications b. Ability to observe committee etiquette and contribute to the overall mission and strategic vision of the committee c. Ability to identify and utilize common interests when solving problems d. Ability to engage in the consensus decision-making process around important committee decisions	BASIC SKILLS
3	Communication Skills	a. Ability to articulate the concerns/challenges/issues that are affecting constituents b. Ability to listen actively, especially to those positioned on the "other side" of the labor-management dynamic c. Ability to communicate effectively across the labor-management dynamic d. Ability to voice opinions and offer insights during committee meetings	ADVANCED SKILLS
4	Interpersonal Skills	a. Ability to build rapport, practice empathy and develop positive working relationships with all committee members, regardless of their position in the labor-management dynamic b. Ability to manage conflict within the committee by applying emotional intelligence skills in committee interactions c. Ability to receive, process and apply constructive feedback for improvement	ADVANCED SKILLS
5	Leveraging Partnership	a. Ability to utilize the assets of a partnership approach to build bridges, inspire collaboration and engage constituents b. Ability to elevate perspective, understand the "big picture" implications of partnership work, and contribute to a broad vision for success c. Ability to foster a more trusting work environment by demonstrating effective partnership and accountability d. Ability to effectively employ partnership tools and support others in learning these tools (consensus decision-making, interest-based problem solving, etc.)	ADVANCED SKILLS
6	Continuous Improvement & Advanced Project Management	a. Ability to identify improvement opportunities relevant to the work of the committee and contribute to innovative solutions b. Ability to apply the principles of continuous improvement to the committee's work, including the collection and analyzation of relevant data c. Ability to utilize basic continuous improvement tools such as a PDSA planner and SMART goals d. Ability to learn from experiences by integrating both failures and successes	ADVANCED SKILLS

*ADVANCED skills addressed in LMC Excellence modules, available in FY2019-20.

APPENDIX D: LMC Co-chairs Self-assessment

*This assessment should be completed by each Co-chair with the support of LMC Co-sponsor, Coach, or Education Advisor. This tool is for EDUCATIONAL USE ONLY.

Instructions: For each skill area, ask the provided questions and collectively decide on the best answer. If there are differences of opinion, discuss reasoning and reach a conclusion through consensus. Note that ADVANCED skills are addressed in ADVANCED Leadership Training.

LMC LOCATION:	CO-CHAIR NAME:
COMMITTEE NAME:	CO-CHAIR SUPPORT NAME(S) AND TITLES (Coach, Co-sponsor, etc.):

Skill Area #1: Partnership	**Strongly Agree**	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**
Co-chair can articulate the benefits and challenges of partnership work	1	2	3	4	5
Co-chair collaborates effectively with all members of the committee, including their fellow co-chair.	1	2	3	4	5
Co-chair employs active listening skills, especially with those on the "other side" of the labor-management dynamic	1	2	3	4	5
Co-chair consistently identifies common interests when solving committee problems	1	2	3	4	5
NOTES:					

Skill Area #2: Organizational Skills	**Strongly Agree**	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**
Co-chair contributes to the creating of relevant committee agendas that address ongoing committee work	1	2	3	4	5
Co-chair is able to develop a basic work plan and drive action toward a project goal	1	2	3	4	5
Co-chair facilitates inclusive committee meetings in a way that engages all members	1	2	3	4	5
Co-chair is able to facilitate a consensus decision-making process for important decisions	1	2	3	4	5

NOTES:

Skill Area #3: Communications Skills	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Co-chair communicates using plain and clear language in a committee setting	1	2	3	4	5
Co-chair communicates with respect and clarity to all sides in the labor-management dynamic	1	2	3	4	5
Co-chair is able to articulate a positive, inspirational vision for the committee	1	2	3	4	5
Co-chair facilitates open communication during committee meetings	1	2	3	4	5
NOTES:					

Skill Area #4: Interpersonal Skills	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Co-chair demonstrates ability to build rapport, practice empathy, and develop working relationships with others on the committee	1	2	3	4	5
Co-chair practices humility and receives feedback with an open mind	1	2	3	4	5
Co-chair manages conflict and adversity effectively	1	2	3	4	5
Co-chair is able to drive engagement and motivate others to embrace a partnership approach	1	2	3	4	5
NOTES:					

Skill Area #5: [ADVANCED] Coaching & Mentoring	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Co-chair actively supports the learning and growth of all committee members	1	2	3	4	5
Co-chair provides constructive feedback to others using the ask-tell-ask model	1	2	3	4	5
Co-chair utilizes the GROW model of motivational coaching	1	2	3	4	5
Co-chair shares responsibility and empowers others to meaningfully contribute	1	2	3	4	5

NOTES:

Skill Area #6: [ADVANCED] Continuous Improvement and Advanced Project Management	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Co-chair is able to identify improvement opportunities and drive innovative solutions	1	2	3	4	5
Co-chair applies the principles of continuous improvement, including the collection and analyzation of data	1	2	3	4	5
Co-chair can apply basic continuous improvement tools such as the PDSA planner and SMART goals	1	2	3	4	5
Co-chair can troubleshoot continuous improvement projects related to committee initiatives	1	2	3	4	5
NOTES:					

APPENDIX E: LMC Committee Members Self-assessment

*This assessment should be completed by each LMC Member with the support of LMC Co-sponsor, Coach, or Education Advisor. This tool is for EDUCATIONAL USE ONLY.

Instructions: For each skill area, ask the provided questions and collectively decide on the best answer. If there are differences of opinion, discuss reasoning and reach a conclusion through consensus. Note that ADVANCED skills are addressed in the LMC Excellence Workshops and should not be applied to members who have not participated in the relevant trainings.

LMC LOCATION:	MEMBER NAME:
COMMITTEE NAME:	MEMBER SUPPORT NAME(S) AND TITLES (Coach, Co-sponsor, etc.):

Skill Area #1: Partnership-Related Skills	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Member is able to describe partnership and the partnership approach to committee work	1	2	3	4	5
Member is able to set aside personally-relevant issues when necessary in order to address more global or universal challenges	1	2	3	4	5
Member is willing and able to collaborate with all committee members, regardless of their position in the labor-management dynamic	1	2	3	4	5
NOTES:					

Skill Area #2: Organization Skills	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Member contributes to and is able to manage committee agendas, minutes, and official communications	1	2	3	4	5
Member observes committee etiquette and contributes to the overall mission and visions of the committee	1	2	3	4	5
Member identifies and utilizes common interests when solving problems	1	2	3	4	5
Member engages in consensus decision-making process around important decisions	1	2	3	4	5
NOTES:					

Skill Area #3: Communications Skills	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Member has demonstrated the ability to articulate the concerns/challenges/issues that are affecting constituents (not just her- or himself)	1	2	3	4	5
Member listens actively, especially to those positioned on the "other side" of the labor-management dynamic	1	2	3	4	5
Member communicates effectively across the labor-management dynamic	1	2	3	4	5
Member actively voices opinions and offers insights during committee meetings	1	2	3	4	5
NOTES:					

Skill Area #4: [ADVANCED] Interpersonal Skills	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Member is able to build rapport, practice empathy and develop positive working relationships with all committee members	1	2	3	4	5
Member has ability to manage conflict by applying emotional intelligence skills	1	2	3	4	5
Member demonstrates ability to receive, process and apply constructive feedback for improvement	1	2	3	4	5
NOTES:					

Skill Area #5: [ADVANCED] Leveraging Partnership	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Member utilizes the assets of partnership to build bridges, inspire collaboration and engage constituents	1	2	3	4	5
Member demonstrates ability to understand the "big picture" and contribute to broad vision for success	1	2	3	4	5
Member creates a more trusting work environment by demonstrating effective partnership and accountability	1	2	3	4	5
Member employs partnership tools and supports others in learning these tools	1	2	3	4	5
NOTES:					

Skill Area #6: [ADVANCED] Continuous Improvement and Advanced Project Management	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Member identifies improvement opportunities and contributes to innovative solutions	1	2	3	4	5
Member applies the principles of continuous improvement, including the collection and analyzation of data	1	2	3	4	5
Member utilizes continuous improvement tools, including the PDSA Planner and SMART goals	1	2	3	4	5
Member learns from improvement experiences by integrating both failures and successes	1	2	3	4	5
NOTES:					

APPENDIX F: Committee Self-assessment (New committee, 6 month)

INSTRUCTIONS: Please complete the following anonymous survey about your experience working on the Labor Management Committee (LMC). Your answers should reflect your experience in the time *SINCE YOU PARTICIPATED IN THE LMC WORKSHOP TRAININGS*.

LMC LOCATION:	DATE:
COMMITTEE NAME:	COMMITTEE CO-CHAIRS:

GOALS and PURPOSE	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1) All committee members understand and agree on the goals and purpose of our committee.	1	2	3	4	5
2) There is alignment between our goals and purpose and the actions taken and/or the decisions made by the committee.	1	2	3	4	5
SUPPORT for the COMMITTEE	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
3) Our committee has adequate resources (for example, budget, people) to support its function.	1	2	3	4	5
4) Our committee has the respect and support of key stakeholders within our organization.	1	2	3	4	5
TIME and LOCATION of MEETINGS	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
5) Our meetings are held regularly and with appropriate frequency.	1	2	3	4	5
6) Our meetings begin and end as scheduled.	1	2	3	4	5
7) The length of our meetings is appropriate and respectful of the agenda.	1	2	3	4	5
8) We receive the meeting agenda and materials in advance of the meeting to allow for appropriate review and preparation.	1	2	3	4	5
9) We consistently use our meeting time well. Issues get the time and attention proportionate to their importance.	1	2	3	4	5

ATTENDANCE / MEETING MINUTES	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
10) Attendance at our meetings is consistent and members arrive on time.	1	2	3	4	5
11) Attendance at our meetings is evaluated as a criterion for continued membership on the committee.	1	2	3	4	5
12) The minutes of our meetings are accurate and reflect the discussion, next steps and/or action items articulated by the members.	1	2	3	4	5
MEMBERSHIP	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
13) Our membership represents the talent and skill set required to fulfill the goals and purpose of the committee.	1	2	3	4	5
14) Our members treat each other with respect and courtesy.	1	2	3	4	5
15) Our members come to meetings prepared and ready to contribute.	1	2	3	4	5
16) As a general rule, when I speak, I feel listened to and that my comments are valued.	1	2	3	4	5

PROJECT-BASED INITIATIVES TO DATE
17) Has your committee identified at least one project-based initiative?   **yes / no** (circle one) (If yes, please list the project(s) below)
18) Has your committee **made progress** on at least one project-based initiative?   **yes / no** (circle one) (If yes, please describe progress below)
19) Has your committee **completed** any project-based initiatives?   **yes / no** (circle one) (If yes, please provide details below)

20) Please describe what impact, if any, this LMC has had on your facility.

21) What are the **top three challenges** this committee has encountered since training?

    1.

    2.

    3.

22) What improved skills/training/support would you like to see for this LMC?

APPENDIX G: Committee Self-assessment (ANNUAL)

INSTRUCTIONS: Please complete the following anonymous survey about your experience working on the Labor Management Committee (LMC).

LMC LOCATION:	DATE:
COMMITTEE NAME:	COMMITTEE CO-CHAIRS:

GOALS and PURPOSE	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1) All committee members understand and agree on the goals and purpose of our committee.	1	2	3	4	5
2) There is alignment between our goals and purpose and the actions taken and/or the decisions made by the committee.	1	2	3	4	5
SUPPORT for the COMMITTEE	**Strongly Agree**	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**
3) Our committee has adequate resources (for example, budget, people) to support its function.	1	2	3	4	5
4) Our committee has the respect and support of key stakeholders within our organization.	1	2	3	4	5
TIME and LOCATION of MEETINGS	**Strongly Agree**	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**
5) Our meetings are held regularly and with appropriate frequency.	1	2	3	4	5
6) Our meetings begin and end as scheduled.	1	2	3	4	5
7) The length of our meetings is appropriate and respectful of the agenda.	1	2	3	4	5
8) We receive the meeting agenda and materials in advance of the meeting to allow for appropriate review and preparation.	1	2	3	4	5
9) We consistently use our meeting time well. Issues get the time and attention proportionate to their importance.	1	2	3	4	5

ATTENDANCE / MEETING MINUTES	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
10) Attendance at our meetings is consistent and members arrive on time.	1	2	3	4	5
11) Attendance at our meetings is evaluated as a criterion for continued membership on the committee.	1	2	3	4	5
12) The minutes of our meetings are accurate and reflect the discussion, next steps and/or action items articulated by the members.	1	2	3	4	5
MEMBERSHIP	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
13) Our membership represents the talent and skill set required to fulfill the goals and purpose of the committee.	1	2	3	4	5
14) Our members treat each other with respect and courtesy.	1	2	3	4	5
15) Our members come to meetings prepared and ready to contribute.	1	2	3	4	5
16) As a general rule, when I speak, I feel listened to and that my comments are valued.	1	2	3	4	5
PROJECT-BASED INITIATIVES TO DATE					

17) Has your committee identified at least one project-based initiative in the past year? ⟶ **yes / no**
(If yes, please list the project(s) below)   (circle one)

18) Has your committee **made progress** on at least one project-based initiative in the
past year? ⟶   **yes / no**
(If yes, please describe progress below)   (circle one)

19) Has your committee **completed** any project-based initiatives? ⟶ **yes / no**
(If yes, please provide details below)   (circle one)

20) Please describe the impact this LMC has had on your facility.

21) What are the **top three challenges** this committee has encountered since training?

1.

2.

3.

22) What improved skills/training/support would you like to see for this LMC?