**Leadership Rounding Guide**

***What is Leadership Rounding?***

Leadership rounding is a process where leaders (e.g., administrator, department heads, and nurse managers) are out in the building with staff, the people they serve, and their families, talking with them directly about care and services provided in the organization including improvement initiatives.

Rounding is an effective method for leaders to hear first-hand what is going well and what issues need to be addressed within the organization. It serves as an important signal of leadership’s commitment to excellence and performance improvement, and promotes a positive culture. Use this as a tool to guide your rounds.

***Questions to Consider Before Rounding***

1. Which leader(s) will conduct rounds?

2. How frequently will rounds take place?

3. What do you want to learn?

4. What questions do you want to ask?

5. What barriers/issues have already been identified that staff should be asked about to gather input on solutions?

***Rounding Process***

1. Leaders conduct rounds as planned, maintaining a positive tone, building relationships with staff by taking the time to listen and respond to staff and resident/client needs.

2. Ask questions and document key points. See optional rounding form below.

3. When employees raise issues or ask for help, assure them you will follow up.

4. Follow up on previous issues or requests —share with staff how the issues were addressed or resolved.

***Post-Rounds***

1. Identify frequently noted issues/themes.
2. Prioritize issues (e.g., by level of urgency, threat, ability to resolve).
3. Conduct follow-up to show responsiveness to the issues raised (note: this may involve following up with staff individually, developing an organizational report that outlines the input collected and proposed solutions—potentially utilizing the priority levels developed in step #2—or including the findings as a component to be communicated during the next rounding session).
4. Consider ways to acknowledge outstanding staff members/unit efforts (e.g., thank you notes or other rewards/recognition).
5. Identify training or coaching opportunities for staff/teams. Plan next rounding session.

**Sample Rounding Form**

**Person Conducting Rounds:**

**Date:**

**Unit/Department:**

**Background:** *(to be completed prior to rounding)*

Rounding Topic:

[ ]  Specific aspect of care: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ] Specific work place or workflow issue:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ] Reinforce mission, vision, values

[ ] Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Information needed prior to rounding:

What is your organization trying to achieve?

BARRIERS/ISSUES ALREADY KNOWN: (sharing these may be an opportunity to ask for staff input on solutions)

PREVIOUS BARRIERS/ISSUES THAT HAVE BEEN ADDRESSED BY LEADERSHIP: (reporting these back to staff shows responsiveness)

**Sample Questions for leaders to ask staff** (document any key information obtained during rounding)

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| --- | --- |
| What things are going well around this initiative or this aspect of care or service? What evidence do you see of success? | Notes: |
| What is frustrating you with the work around this initiative or this aspect of care or service? What barriers/issues do you see threatening this initiative or aspect of care or service? How should they be addressed? | Notes: |
| What additional resources/tools/equipment are needed? | Notes: |
| Are there any colleagues who deserve special recognition for their efforts on this initiative or this aspect of care or service? | Notes: |
| Are there any colleagues who could be helped through coaching/training to make this initiative or aspect of care or service more successful? | Notes: |
| What feedback, if any, have you heard from residents/clients and families about changes taking place as part of this initiative or this aspect of care or service? | Notes: |
| What else would you like the leadership to know about this initiative or this aspect of care or service? | Notes: |

Leaders – Summarize notes from conversations you had on this topics:

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*Adapted from: QAPI Leadership Rounding Guide*