

# Executive Rounding

## Info Guide

### Purpose

Executive Rounding is the process used by the Executive Office to have a dialogue between departments and the executive leadership team on organizational performance. It is designed to use data and performance measures to monitor and manage the county's operations and promote dialog and learning. The ultimate purpose is to maintain accountability at all levels of the organization and drive improvements.

### Process

The rounding incorporates *visual management systems* that at King County we refer to as "tier boards". Tier boards use visual displays to show data for key operational measures and projects in order to:

- provide quick glance information about how a **process** is performing against its **target, make problems visible**, and to show the **status of your work**,
- show performance data that can be easily understood **by anyone** and **everyone**, and
- help you **run your business** and serve as a place to **huddle** with your team
- enable a **dialog** about **what actions should be taken** to make improvements.

The standard rounding questions that the executive leadership team will ask are during the meeting are:

1. Are there any follow-ups from our last visit?
2. What are you currently doing to help achieve the Executive's priorities?  
(BRG, ESJ, Climate, Mobility)
3. How are you doing on achieving your outcomes?
  - How are you measuring success or progress? (QCDSM)
  - What is the next step that moves you closer to achieving the outcome?  
(Countermeasures)
4. What can we do to help?

The rounding conversation will typically begin at the Tier 4 Board (department board) and them move to a selected Tier 3 Board (division/line of business board).

### Payoff

#### For Executive Leadership Team:

- Learn about the work and organizational performance of the county
- Removing "pain points" or barriers for staff
- Showing leadership by supporting improvement efforts
- Understand issues facing departments and how the county is being managed

#### For Departments:

- Update executive leadership team about strategic issues and performance of the department
- Opportunity to elevate problems to senior leadership so that they can remove "pain points" or barriers for you.
- Get direct feedback and reactions from Executive leadership team

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## Support Services Offered

The Performance and Strategy (PS) team in PSB works as a liaison between the Executive leadership team and department staff. The PS team offers the support to departments, when needed, to ensure both the department and the Executive leadership team get the maximum value from the rounding, that there are no surprises, and that we can promote a positive culture of learning and improvement.

## PS Standard Support Process

### Before the Rounding

The PS team member will schedule a 60 minute meeting two-weeks before a rounding with the department performance lead to discuss the status of the Tier 4 Board and learn about the Tier 3 Board the department plans to highlight. *The department performance lead is encouraged to include the Tier 3 Board lead in this conversation.* This meeting occurs around the tier board and typically involves reviewing board content using the *visual display checklist* (see last page).

### During the Rounding

The PS team member will take notes and capture action items during the rounding conversation.

### After the Rounding

The PS team member will schedule a 30 minute meeting with the department lead to debrief the rounding and review action items that were generated during the rounding.

## Additional Support Available

The PS team is available to provide **performance measurement** and **visual management** workshops to departments. The department performance lead is expected to work with a PS team member to customize the workshop for the audience and may be asked to assist in delivering the content.

### Performance Measurement..... ~ 3 hours

The introductory version of this course emphasizes why performance measurement is beneficial to our work and the different types of performance measures. Participants will gain familiarity with product and process measures (QCDSM). This course can be tailored to match audience skillset. This session can accommodate about 18 participants.

### Introduction to Visual Management ..... ~ 3 hours

The learning objectives for this training are to:

- Understand the purpose, benefits, and key elements of visual management
- Identify characteristics of effective visual displays
- Become familiar with tier board structure and content
- Increase visual management adoption in host department

This training incorporates a “go see” where participants are taken on a facilitated tour of tier boards. This session can accommodate about 18 participants.

### Consulting/Coaching ..... ~30-60 min

Get 1:1 feedback on how to improve current visual displays, performance measurement, data visualization, and practical best practices.

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## Want More Info?

Email – [PSB@kingcounty.gov](mailto:PSB@kingcounty.gov)

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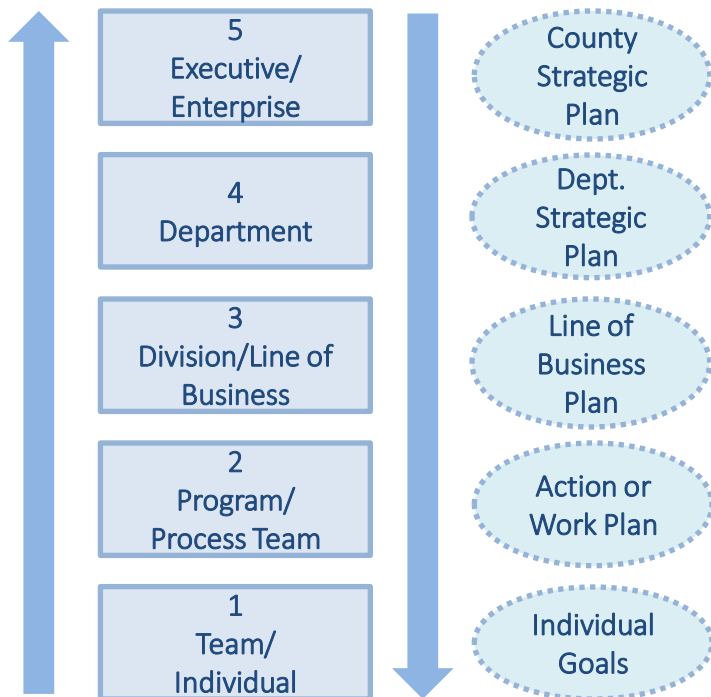
## FAQs

The following is a list of frequently asked questions (FAQs) generated from employees. If you have additional questions that are not answered on this list please contact [PSB@kingcounty.gov](mailto:PSB@kingcounty.gov) with your question and the PS team will respond to your inquiry.

### 1. What do the different tiers represent?

This picture shows the intended two-way interplay between tier boards at different levels of the organization. The basic idea is that strategic direction **cascades down** and that the work occurring should **align up** and advance the strategic direction.

In addition, there are example products, on the right, that inform each other from the county's strategic plan all the way to individual goals.



### 2. Who is the primary audience for the tier boards?

Tier boards are meant to be used by the department, division, section, etc. For example, tier 3 boards should be used by the division management to understand how they are doing on their goals and measures. Rounding is one way aspect of "leader standard work" to review the status of the organization. In addition to the Executive leadership team rounding on Tier 4 boards, Department Directors are expected to round on Tier 3 boards, and so on.

### 3. How did the concept of roundings emerge?

Rounding is an extension of the Executive office's continued desire to use data to manage and improve. Roundings are a direct descendent of KingStat and Performance Forums, previous efforts to use data to understand and improve the county's overall performance. The biggest difference with those previous efforts is that now the Executive leadership team is going to the workplace to understand how the organization is measuring and using the data to manage and improve.

### 4. Who selects what tier 3 board to highlight?

The department director has the decision-making authority to choose which tier 3 board will get highlighted. PS staff would like to know at least two weeks in advance of our rounding so we can be adequately prepared.

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## Visual Display Checklist

The visual display checklist below is a tool that is used to help identify components that can increase the utility of visual displays such as graphs and charts. This checklist provides guidance intended to help people think about the type of information displayed on a tier board.

Can you tell at a glance...	Yes	No
<b>Visual clarity</b>		
Can you understand the information from 5 feet away within 5 seconds?		
<b>Understanding</b>		
Do titles help “tell the story” in a headline form?		
Are there call outs explaining how to interpret the data/what the data mean?		
Are there call outs describing interventions, changes, or explanatory factors for the results?		
<b>Are there clear standards for performance?</b>		
Is there a quantifiable target? benchmark? ultimate goal?		
Is there an opportunity for variable/seasonal targets?		
<b>Are “abnormal” conditions readily visible?</b>		
Can you see the planned vs. actual performance (performance gap)?		
Is the directionality for results clear? (e.g., up = good)		
Is it clear when results are too high/too low/within bounds?		
<b>Are improvement opportunities clearly visible?</b>		
Is there recurrence or a pattern to the problem?		
Is cause and effect understood?		
Are countermeasures, or actions to address the problem, visible or planned?		
<b>Is the team using the visual system?</b>		
Is there an indication that there has been recent activity at the board?		
Are there action items, assignments, and next steps visible?		

For Tier 4 – do you see the *outcomes* the organization is trying to achieve?

For Tier 3 – do you see key *operational measures* and *priority projects*?