

Organization Information Sheet - Structure

Mission Statement _____

Vision Statement _____

Values _____

My Position Title _____

2 Up

1) Name _____
Position _____
2) Name _____
Position _____

2 Down

1) Name _____
Position _____
2) Name _____
Position _____

Peer Leaders _____



Organization Information Sheet - Function

My Part of the Organization _____

Clinical Mission

Patient Population _____

Practice Scope _____

Practice Location

Inpatient _____

Outpatient _____

Virtual _____

Teaching Mission

Program Type _____

Faculty _____

Learners _____

Accreditation _____

Administrative Mission

Committees _____

Work Groups _____

Metrics

Other Missions

Research _____

Community _____

Outreach _____

Advocacy _____



Organization Information Sheet - Resources

Total Budget _____

Past FY Performance _____

% of Org Budget _____

Past FY Performance _____

Operating Budget _____

Past FY Performance _____

Discretionary Budget _____

Current FY To Date _____

Resource Manager _____

Contact Info _____

Facilities

Type _____

Location _____

Description _____

Type _____

Location _____

Description _____

Equipment Management

Name _____

Position _____

Name _____

Position _____

Supply Management

Name _____

Position _____

Name _____

Position _____

Misc Resources

Personnel Management

Name _____

Position _____

Name _____

Position _____



Task Triage – Resource Based

Low	Medium	High

In your control

Little/no resources

QUICK fix - 30 days

Broad impact

May be a temporary fix

May need approval

Resources you may have

New vs. Shifting

Fix in 3 – 6 months

Broad impact

Need champions

Resources you don't have

Fix in 1 – 2 years

“Stretch”

Institutional change



Task Triage – Urgent / Important Based

Resource Category: Low, Med, High

Urgency

+

-

UI	UNI
NUI	NUNI

+

Importance

-

- UI: Clear deadlines, consequences if not completed
- UNI: No deadline, brings you closer to your goal
- NUI: Has to be done, but not by you (delegate!)
- NUNI: Distraction, procrastination, wasted effort



Task Triage – Urgent / Important Based

Resource Category: Low, Med, High

Urgency

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Task Triage – Urgent / Important Based

Resource Category: Low, Med, High

Urgency

+

-

UI	UNI		
NUI	NUNI		

+

Importance

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4 Step Action Plan Template

1) Nesting:

Organization Goal _____

1 Up Goal _____

2) Where are we going / Where are we now:

SMART Goal _____

Is my goal: Specific, Measurable, Achievable, Relevant, Time-Bound?

Baseline _____ Where are we starting

Benchmarking _____ What is the standard, where is everyone else

3) Task List 90 Days:

1. _____

2. _____

3. _____

4) Accountability:

Where _____ How _____

When _____ To Whom _____

