

Organizational Structures Assessment Tool (OSAT) Domains and Items

Human Resource Practices

- **Select** staff in each of the relevant roles with attention to their relational competence or teamwork abilities, in addition to their technical competence
- **Train** staff in each of the relevant roles with attention to their relational competence or teamwork abilities, in addition to their technical competence
- Use **relational job design** to create clear expectations regarding the responsibility to coordinate with all relevant roles
- Develop **shared accountability** for outcomes among all relevant roles
- Develop **shared rewards** for outcomes among all relevant roles
- Use **relational leadership** in all supervisory/coaching/mentoring relationships to role model relational coordination with all relevant roles
- Develop **conflict resolution** process for proactively identifying conflicts among all relevant roles and transforming them into growth and learning opportunities

Coordinating Mechanisms

- Create **boundary spanner** roles with sufficient resources and clear responsibilities to facilitate coordination among all relevant roles
- Create **shared meetings** to facilitate coordination among all relevant roles
- Create **shared protocols** to facilitate coordination among all relevant roles
- Create **shared information systems** to facilitate coordination among all relevant roles
- Create **shared space** to facilitate coordination among all relevant roles

The OSAT includes a set of questions to assess each of the eleven domains. The first question in each domain is open-ended and the other questions can be used as follow-ups or prompts to ensure that you get sufficient information to code the response for that domain as shown at the end of each domain.

- We recommend you capture interviewee responses with notes and/or tape, then transcribe, and then code. You should preserve the transcribed responses for assessing inter-rater reliability and can also use them as qualitative data.
- If you are assessing multiple organizations for the purpose of comparison, it's important to use the same rater across organizations or, if you have multiple raters, train them and do cross-checking to ensure inter-rater reliability.
- The OSAT must be customized to the particular work process whose coordination you are studying. Boundary spanner roles are always relevant to ask about, for example, but the types of boundary spanner roles will vary. You need to understand the concepts sufficiently well that you can map them on to the practices that exist in the sector and work process you are studying and/or seeking to improve.
- Just as with the relational coordination survey, identify the work process that is being coordinated, and which roles are involved. For example the work process might be "educating our students" and the roles involved might be "core academic teachers, special education teachers, guidance counselors, teacher leaders, school leaders, parents/caregivers."

Interview Guide for the Organizational Structures Assessment Tool (OSAT)

1. Select for Teamwork

- Tell me how selection works in your organization.
- How are participants in each role selected?
- What are the competencies that you are looking for?
- What methods do you use to select participants who have these competencies?

Coding for each role: Are people in this role selected for teamwork with the other key roles?

(1=no, 2=sometimes, 3=consistently)

2. Train for Teamwork

- Tell me how training works in your organization.
- What kind of training do participants in each role receive? Please consider all types of training including orientation, on-boarding, professional development, corrective, etc.
- What are the competencies that the training is seeking to build?
- What methods do you use to train participants in these competencies?

Coding for each role: Are people in this role trained for teamwork with the other key roles?

(1=no, 2=somewhat, 3=consistently)

3. Relational Job Design

- Tell me how job descriptions are used in your organization.
- Is there a formal job description for each role?
- Does this job description include relational tasks and capabilities, such as coordination or relationship building, in addition to technical tasks and capabilities? Examples?
- Are there specific roles that people are asked to coordinate with about specific things?

Coding for each role: Does the job description for this role include coordinating work with the other key roles? (1=no, 2=somewhat, 3=consistently)

4. Shared Accountability

- Tell me about the accountability processes that are used in your organization.
- How are participants in each role held accountable for outcomes?
- Are participants held accountable for their own outcomes only, or for outcomes of the process as a whole?
- Is accountability primarily developmental or punitive?
- Is accountability primarily proactive or reactive?
- When a negative outcome occurs, how do you figure out who is responsible?
- Does this accountability process involve the clients who are being served by your organization? How?

Coding for each role: Do people in this role have accountability for coordinating work with the other key roles? (1=no, 2=somewhat, 3=consistently) Do they have shared accountability for outcomes with other key roles? (1=no, 2=somewhat, 3=consistently)

5. Shared Rewards

- Tell me about the rewards, whether monetary or otherwise, that are provided in your organization.
- Which roles have access to these rewards?
- Are participants in the various roles rewarded for their own outcomes only, or for outcomes of the organization as a whole?
- When a positive outcome occurs for the organization, how do you figure out which participants deserve credit?

- Does this reward process involve the clients who are being served by the organization?
How?

Coding for each role: Does this role have shared rewards (e.g. monetary or recognition) for coordinating their work with the other key roles? (1=no, 2=somewhat, 3=consistently)

6. Relational Leadership

- Tell me about the different kinds of supervision and/or coaching that are provided to employees in your organization.
- Which roles have access to these kinds of supervision and/or coaching?
- What are the ratios of supervisors/coaches/mentors per employee in each of the roles?
- What kind of feedback are they expected or trained to provide?

Coding for each role: Do leaders provide coaching and support for people in this role to coordinate their work with the other key roles? (1=no, 2=somewhat, 3=consistently)

7. Shared Conflict Resolution

- Tell me about any processes that exist for resolving conflicts in your organization.
- Which roles have access to those conflict resolution processes?
- How proactive are leaders expected to be in mediating and/or resolving conflicts?
- Is conflict resolution part of leaders' job design and accountability?

Coding for each role: Do people in this role have processes to address conflicts with other key roles? (1=no, 2=somewhat, 3=consistently)

8. Diversity Management

- Tell me about demographic differences that you have observed between roles in your organization.
- Any consequences that you have noticed of these differences?

- What are your policies for managing those differences?

Coding for each role: Do people in this role have support to manage diversity issues with other key roles? (1=no, 2=somewhat, 3=consistently)

9. Boundary Spanners

- Tell me about any roles in your organization whose primary responsibility is to coordinate the work of others.
- What is this role called, and what are its responsibilities?
- Which roles are the boundary spanners expected to coordinate between?
- What is the training or backgrounds of these boundary spanners?
- What percentage of cases are assigned to these boundary spanners?
- How many cases per boundary spanner? Do your staffing levels depend on severity of need?
- At what stage of the journey does the boundary spanner's responsibility begin? End?

Coding for each role: Are people in this role supported by a boundary spanner (e.g. case manager, care coordinator, project manager) to coordinate their work with the other key roles? (1=no, 2=somewhat, 3=consistently)

10. Shared Meetings/Huddles

- Tell me about the meetings and/or huddles that are used to support the work of your organization.
- What is their purpose?
- How often are they held?
- How frequently does each role participate?
- Do these meetings or huddles include clients?

- Who leads these meetings?

Coding for each role: Do people in this role have access to meetings and/or huddles to coordinate their work with the other key roles? (1=no, 2=somewhat, 3=consistently)

11. Shared Protocols

- Tell me about the protocols that are used to guide the work of your organization.
- Which roles are expected to use these protocols?
- What percent of clients are served using these protocols? What is the rationale for using or not using these protocols for a given client?
- How were these protocols developed? When? By whom?
- What is the process for updating them?

Coding for each role: Do people in this role have shared protocols to coordinate their work with the other key roles? (1=no, 2=somewhat, 3=consistently)

12. Shared Information Systems

- Tell me about the information systems that are used to support the work of your organization.
- What kinds of information are available through those systems?
- Which roles are able to and/or expected to use these information systems?
- What is their ease of access?

Coding for each role: Do people in this role have shared information systems to coordinate their work with the other key roles? (1=no, 2=somewhat, 3=consistently)

REPORTING THE DATA

- Reporting the data can be done in multiple ways. See below for one way that is more typical for an academic audience wanting to use the results for research, and another way that may be more useful for a practitioner audience wanting to use the results to drive action.

Organizational Structures Assessment Tool (OSAT) Sample Report Summarizing Data Across Nine Sites

	Factor loading	Range	Mean	SD	No. of observations
Cross-functional selection					
Physicians selected for cross functional teamwork	0.701	0-2	0.44	0.88	9
Nurses selected for cross functional teamwork	0.760	0-2	1.44	0.73	9
Physical therapists selected for cross functional teamwork	0.570	0-2	1.67	0.88	9
Cross-functional conflict resolution					
Physician access to cross-functional process	0.916	0-1	0.44	0.53	9
Nurse access to cross-functional process	0.700	0-1	0.22	0.44	9
Physical therapist access to cross-functional process	0.438	0-1	0.33	0.50	9
Cross-functional performance measurement					
Cross-functional approach to quality measurement	0.544	1-5	3.33	1.41	9
Problem-solving approach to quality measurement	0.729	1-5	2.78	1.39	9
Cross-functional approach to efficiency measurement		1-5	2.56	1.88	9
Problem-solving approach to efficiency measurement	0.834	1-5	3.00	1.58	9
Cross-functional rewards					
Physicians rewarded for cross-functional teamwork	0.438	0-3	0.22	0.67	9
Nurses rewarded for cross-functional teamwork	0.560	0-2	0.56	0.88	9
Physical therapists rewarded for cross-functional teamwork	0.803	0-2	1.11	1.05	9
Cross-functional meetings					
Nurses included in physician rounds	0.548	0-2	1.33	0.87	9
Physical therapists included in physician rounds	0.691	0-2	0.56	0.88	9
Case managers included in physician rounds	0.677	0-2	0.67	0.87	9
Physicians included in nursing rounds	-0.210	0-2	0.78	0.44	9
Physical therapists included in nursing rounds	-0.112	0-2	1.44	0.73	9
Case managers included in nursing rounds	0.642	0-2	1.33	1	9
Cross-functional boundary spanners					
Case manager caseload	-0.740	6.7-40	26.30	10.80	9
Case manager discharge planning role	0.515	0-1	0.89	0.33	9
Case manager coordination role ^a	0.368	0-1	0.44	0.53	9
Primary nursing model	0.746	0-1	0.56	0.53	9
High-performance work practices index ($\alpha = 0.93$)					

