Relational Coordination – Past, Present and Future

Jody Hoffer Gittell and John Paul Stephens

8th Annual Roundtable
Relational Coordination Research Collaborative
Relational Dynamics of Multi-Level Systems Change
Relational coordination is....

• A construct
  • Giving a name to something basic that has always existed
  • Communicating and relating for the purpose of task integration

• A theory of performance
  • Performance outcomes of RC go beyond traditional tradeoffs
  • Structures *support or undermine* RC depending on their design
  • Matters most when work is interdependent, uncertain, time constrained

• A theory of change
  • Provides guidance for getting from here to there
  • Interventions include structural, relational, work process
Relationships
Shared goals
Shared knowledge
Mutual respect

Communication
Frequent
Timely
Accurate
Problem-solving
Structures

Select & Train for Teamwork
- Shared Accountability
- Shared Rewards
- Shared Conflict Resolution Process
- Boundary Spanner Roles
- Relational Job Design
- Shared Meetings & Huddles
- Shared Protocols
- Shared Information Systems

Relational Coordination

Frequent
Timely
Accurate
Problem Solving
Communication

Shared Goals
Shared Knowledge
Mutual Respect

Performance Outcomes

Quality & Safety
Efficiency & Finance
Client Engagement
Worker Well-Being
Learning & Innovation

Conditions That Increase the Need for RC

Interdependence
Uncertainty
Time Constraints

Relational coordination as a theory of performance
Relational coordination as a theory of change

Middle & Top Leadership

**Structural Interventions**
- Relational Job Design
- Select & Train for Teamwork
- Shared Accountability
- Shared Rewards
- Shared Conflict Resolution
- Boundary Spanner Roles
- Shared Meetings & Huddles
- Shared Protocols
- Shared Information Systems

**Relational Coordination**
- Frequent
- Timely
- Accurate
- Problem Solving
- Communication
- Shared Goals
- Shared Knowledge
- Mutual Respect

**Performance Outcomes**
- Quality & Safety
- Efficiency & Finance
- Client Engagement
- Worker Well-Being
- Learning & Innovation

Frontline Leaders, Colleagues & Clients

**Relational Interventions**
- Create Safe Space
- Relational Mapping
- Humble Inquiry/Listening

**Work Process Interventions**
- Assess Current State
- Identify Desired State
- Experiment to Close the Gap
Core construct is called…

relational coordination

…and defined as “communicating and relating for the purpose of task integration”

(Gittell, 2002)
Relationships
Shared goals
Shared knowledge
Mutual respect

Communication
Frequent
Timely
Accurate
Problem-solving
Relational coordination construct is...

• Conceptualized as a network of communication and relationships ties between key stakeholders or workgroups involved in a focal work process

• Useful in many contexts, within and across organizations

• Measured using the Relational Coordination Survey, a 7-item validated tool (Gittell et al, 2010; Gilmartin, et al, 2015; Valentine, Nembhard & Edmondson, 2015)
Flight departure process:
A coordination challenge

Passengers

Operations Agents
Ramp Agents
Ticket Agents
Caterers
Freight Agents
Mechanics
Pilots
Flight Attendants
Baggage Agents
Gate Agents
Cabin Cleaners
Fuelers

Patient care: A coordination challenge

- Case Managers
- Attending Physicians
- Physical Therapists
- Technicians
- Administrators
- Referring Physicians
- Social Workers
- Nursing Assistants
- Nurses
- Patients
- Nursing Assistants

Relations:
- Case Managers to Patients
- Attending Physicians to Patients
- Physical Therapists to Patients
- Technicians to Patients
- Administrators to Patients
- Referring Physicians to Patients
- Social Workers to Patients
- Nurses to Patients
- Patients to Patients
K-12 education: A coordination challenge
## RC survey questions

<table>
<thead>
<tr>
<th>1. Frequent Communication</th>
<th>How <strong>frequently</strong> do people in each of these groups communicate with you about <strong>post-operative care procedures for our surgical patients</strong>?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Timely Communication</td>
<td>Do they communicate with you in a <strong>timely way</strong> about <strong>post-operative care procedures for our surgical patients</strong>?</td>
</tr>
<tr>
<td>3. Accurate Communication</td>
<td>Do they communicate with you <strong>accurately</strong> about <strong>post-operative care procedures for our surgical patients</strong>?</td>
</tr>
<tr>
<td>4. Problem-Solving Communication</td>
<td>When there is a problem with <strong>post-operative care procedures for our surgical patients</strong>, do people in each of these groups blame others or work with you to <strong>solve</strong> the problem?</td>
</tr>
<tr>
<td>5. Shared Goals</td>
<td>Do people in each of these groups <strong>share your goals</strong> for <strong>post-operative care procedures for our surgical patients</strong>?</td>
</tr>
<tr>
<td>6. Shared Knowledge</td>
<td>Do people in each of these groups <strong>know</strong> about the work you do with <strong>post-operative care procedures for our surgical patients</strong>?</td>
</tr>
<tr>
<td>7. Mutual Respect</td>
<td>Do people in each of these groups <strong>respect</strong> the work you do with <strong>post-operative care procedures for our surgical patients</strong>?</td>
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</table>
Sample RC findings

Between Workgroups
N=104

<table>
<thead>
<tr>
<th>RC Index</th>
<th>Mean</th>
<th>Min</th>
<th>Max</th>
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<tbody>
<tr>
<td>Frequent Communication</td>
<td>4.22</td>
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<td>3.03</td>
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<td>Accurate Communication</td>
<td>3.67</td>
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<tr>
<td>Problem-Solving Communication</td>
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<td>3.18</td>
<td>3.86</td>
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<td>3.86</td>
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<td>4.18</td>
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<tr>
<td>Shared Knowledge</td>
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<td>Mutual Respect</td>
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<td>3.36</td>
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Sample RC findings
Sample RC findings
Why does RC matter and how can organizations support it?
Relational coordination as a theory of performance

**Structures**
- Select & Train for Teamwork
- Shared Accountability
- Shared Rewards
- Shared Conflict Resolution Process
- Boundary Spanner Roles
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**Performance Outcomes**
- Quality & Safety
- Efficiency & Finance
- Client Engagement
- Worker Well-Being
- Learning & Innovation

**Conditions That Increase the Need for RC**
- Interdependence
- Uncertainty
- Time Constraints
RC theory empirically tested in 30 industry contexts

- Accounting
- Airlines
- Autism care
- Banking
- Consulting
- Criminal justice
- Education
  - Early childhood education
  - Higher education
  - E-learning
- Early intervention
- Electronics
- Finance
- Information technology
- Healthcare
  - Chronic care
  - Elder care
  - Emergency care
  - Home care
  - Intensive care
  - Neonatal intensive care
  - Medical care
  - Mental health care
  - Obstetric care
  - Primary care
  - Psychiatric hospital care
  - Rehabilitation care
  - Surgical care
- Manufacturing
- Pharmacy
- Software
...and in 22 countries around the world

- Austria
- Australia
- Belgium
- Canada
- China
- Denmark
- Egypt
- England
- Ecuador
- France
- Ireland
- Israel
- Japan
- Netherlands
- Norway
- Pakistan
- Scotland
- South Korea
- Spain
- Sweden
- Switzerland
- United States
RC increasing in the scholarly discourse

Cumulative search results on Google Scholar from 1990 – 2017 for “relational coordination”

SWA Way published
RCRC founded
Proposition 1

Relational coordination positively affects performance outcomes for multiple stakeholders by relaxing tradeoffs and *shifting out* performance frontiers

Womack, Jones & Roos, 1990; Gittell, 1995; Schmenner & Swink, 1998; Lapre & Scudder, 2004; Pagell et al, 2015
RC shifts out performance frontiers, moving from “either/or” to “both/and”…

Quality & Safety Outcomes

Efficiency & Financial Outcomes

Relational coordination
…enabling performance outcomes to be achieved for multiple stakeholders
## Evidence regarding performance outcomes

<table>
<thead>
<tr>
<th>Outcomes of relational coordination</th>
<th>Total findings</th>
<th>Findings that support RCT</th>
<th>% Findings that support RCT</th>
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</thead>
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<tr>
<td>Efficiency and financial outcomes</td>
<td>18</td>
<td>15</td>
<td>83%</td>
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<tr>
<td>Quality and safety outcomes</td>
<td>58</td>
<td>47</td>
<td>81%</td>
</tr>
<tr>
<td>Client engagement</td>
<td>10</td>
<td>10</td>
<td>100%</td>
</tr>
<tr>
<td>Worker outcomes</td>
<td>28</td>
<td>27</td>
<td>96%</td>
</tr>
<tr>
<td>Learning and innovation</td>
<td>10</td>
<td>10</td>
<td>100%</td>
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<tr>
<td><strong>Total findings</strong></td>
<td><strong>124</strong></td>
<td><strong>109</strong></td>
<td><strong>88%</strong></td>
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</tbody>
</table>
Proposition 2

Relational coordination *matters most* for performance when work is reciprocally interdependent, uncertain and time constrained

Thompson, 1968; Argote, 1982; Adler, 1995
Proposition 3

Organizational structures *strengthen* RC when they are connect across multiple stakeholders to reduce subgoal optimization and increase systems thinking – and they *weaken* RC when they are not

# Summary of findings about structures

<table>
<thead>
<tr>
<th>Structures that support relational coordination</th>
<th>Total findings</th>
<th>Findings that support RCT</th>
<th>% Findings that support RCT</th>
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</thead>
<tbody>
<tr>
<td>Relational job design</td>
<td>5</td>
<td>5</td>
<td>100%</td>
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<tr>
<td>Select and train for relational competence</td>
<td>5</td>
<td>5</td>
<td>100%</td>
</tr>
<tr>
<td>Shared accountability and rewards</td>
<td>7</td>
<td>7</td>
<td>100%</td>
</tr>
<tr>
<td>Shared conflict resolution</td>
<td>2</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>Relational leadership roles</td>
<td>4</td>
<td>4</td>
<td>100%</td>
</tr>
<tr>
<td>Boundary spanners</td>
<td>9</td>
<td>6</td>
<td>67%</td>
</tr>
<tr>
<td>Shared meetings</td>
<td>7</td>
<td>7</td>
<td>100%</td>
</tr>
<tr>
<td>Shared protocols and routines</td>
<td>12</td>
<td>11</td>
<td>92%</td>
</tr>
<tr>
<td>Shared information systems</td>
<td>6</td>
<td>4</td>
<td>67%</td>
</tr>
<tr>
<td>Formal contracts</td>
<td>2</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>Relational interventions</td>
<td>2</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Total findings</strong></td>
<td><strong>61</strong></td>
<td><strong>55</strong></td>
<td><strong>90%</strong></td>
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</tbody>
</table>
How do we get from here to there?
Relational coordination as a theory of change

Middle & Top Leadership

**Structural Interventions**
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Frontline Leaders, Colleagues & Clients

**Relational Interventions**
- Create Safe Space
- Relational Mapping
- Humble Inquiry/Listening

Relational interventions create a safe space and facilitate relational mapping and humble inquiry/listening to enhance relational coordination.
RC becoming a multi-level theory of change

<table>
<thead>
<tr>
<th>Level</th>
</tr>
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<tbody>
<tr>
<td>Institutional</td>
</tr>
<tr>
<td>Cross-Organizational</td>
</tr>
<tr>
<td>Organizational</td>
</tr>
<tr>
<td>Cross-Functional</td>
</tr>
<tr>
<td>Inter-Personal</td>
</tr>
<tr>
<td>Intra-Personal</td>
</tr>
</tbody>
</table>
Six stages of RC change

- Stage 1: Explore context, introduce RC
- Stage 2: Create change team
- Stage 3: Measure RC
- Stage 4: Reflect on RC findings
- Stage 5: Design interventions
- Stage 6: Implement and reassess
Stage 1: Explore context, introduce RC

- Shared goals
- Shared knowledge
- Mutual respect

- Frequent
- Timely
- Accurate
- Problem-solving communication
Stage 2: Create change team

- Create a change team that represents key stakeholders
- Motivate these stakeholders from distinct perspectives/power to contribute time and effort to change process
- Facilitate sensitive discussions with a "safe space" to disagree respectfully
- Engage in relational mapping to visualize the current state of coordination
Stage 2: Create change team

- Identify a work process that needs better coordination – say “improving health outcomes in our region”
- Which stakeholders are involved?
- Draw a circle for each stakeholder and lines connecting between them
  - **WEAK RC = RED**
  - **MODERATE RC = BLUE**
  - **STRONG RC = GREEN**
- Color of the circle says how we are coordinating *within each stakeholder*, color of the line says how we are coordinating *between stakeholders*
Stage 2: Create change team

RC = Shared Goals, Shared Knowledge, Mutual Respect, Supported by Frequent, Timely, Accurate, Problem-Solving Communication
Stage 2: Create change team
Stage 2: Create change team
Stage 3: Measure RC

- Use RC survey to assess the current state accurately and inclusively
- Survey takes about 20 minutes to complete and results remain anonymous
- Results are shared as a basis for designing interventions in an inclusive process
### Stage 3: Measure RC

<table>
<thead>
<tr>
<th>Stage</th>
<th>Question</th>
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Stage 4: Reflect on RC findings

- Change team shares RC measures with key stakeholders
- “Looking into the mirror”
- “Putting the elephant on the table”
- A starting point for new conversations
- A starting point for reflection and change
Stage 4: Reflect on RC findings

![Between Workgroups](N=104)

<table>
<thead>
<tr>
<th>RC Index</th>
<th>Mean</th>
<th>Min</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequent Communication</td>
<td>3.66</td>
<td>3.38</td>
<td>4.02</td>
</tr>
<tr>
<td>Timely Communication</td>
<td>4.22</td>
<td>3.84</td>
<td>4.61</td>
</tr>
<tr>
<td>Accurate Communication</td>
<td>3.46</td>
<td>3.03</td>
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<td>3.67</td>
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<td>3.93</td>
</tr>
<tr>
<td>Communication</td>
<td>3.45</td>
<td>3.18</td>
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<td>2.91</td>
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<tr>
<td>Mutual Respect</td>
<td>3.66</td>
<td>3.36</td>
<td>4.00</td>
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</tbody>
</table>

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![Weak to Strong](Weaken Workgroups)

- Weak: <4.1
- Moderate: 4.1-4.6
- Strong: >4.6

![Weak to Strong](Between Workgroups)

- Weak: <3.5
- Moderate: 3.5-4.0
- Strong: >4.0
Stage 4: Reflect on RC findings
## Stage 4: Reflect on RC findings

<table>
<thead>
<tr>
<th></th>
<th>Admin</th>
<th>CC</th>
<th>PCAs</th>
<th>Phys</th>
<th>PA&amp;NP</th>
<th>RNs</th>
<th>ResTh</th>
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Stage 4: Reflect on RC findings
Stage 4: Reflect on RC findings

<table>
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<tr>
<th>Stage</th>
<th>Govt</th>
<th>CRctn</th>
<th>DA</th>
<th>Edv</th>
<th>Faith</th>
<th>Srv</th>
<th>H/MH</th>
<th>Parle</th>
<th>Police</th>
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Stage 3: Reflect on RC findings

- Where does relational coordination currently work well? Where does it work poorly?
- What are the underlying causes?
- How does this impact our desired outcomes?
- Where are our biggest opportunities for change?
Stage 5: Design interventions

- Change team creates a plan of action for improving relational coordination and desired outcomes
- Change team designs interventions in partnership with key stakeholders
Stage 5: Design interventions

Middle & Top Leadership

Structural Interventions
- Relational Job Design
- Select & Train for Teamwork
- Shared Accountability
- Shared Rewards
- Shared Conflict Resolution
- Boundary Spanner Roles
- Shared Meetings & Huddles
- Shared Protocols
- Shared Information Systems

Relational Interventions
- Create Safe Space
- Relational Mapping
- Humble Inquiry/Listening

Relational Coordination
- Frequent
- Timely
- Accurate
- Problem Solving
- Communication
- Shared Goals
- Shared Knowledge
- Mutual Respect

Performance Outcomes
- Quality & Safety
- Efficiency & Finance
- Client Engagement
- Worker Well-Being
- Learning & Innovation

Work Process Interventions
- Assess Current State
- Identify Desired State
- Experiment to Close the Gap

Frontline Leaders, Colleagues & Clients
Create a matrix with the roles from your relational map across the top

Add org structures along the left column

For each one, ask “How well does this org structure currently support RC in our organization?”

- WEAK SUPPORT FOR RC = RED
- MODERATE SUPPORT FOR RC = BLUE
- STRONG SUPPORT FOR RC = GREEN
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- **WEAK SUPPORT**
- **MODERATE SUPPORT**
- **STRONG SUPPORT**
Organizational structures assessment

- Which organizational structures are currently *most supportive* of relational coordination?
- Which are currently *least supportive* of relational coordination?
- Where are the biggest potential gains from redesigning them to better support relational coordination?
Stage 6: Implement and reassess

- Change team implements interventions they have designed
- Change team reassesses relational coordination and desired outcomes
- Change team expands to include new stakeholders as needed
Where to start? And how to keep change efforts aligned and linked across levels?

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