



## **Governance Gain Planner Instruction Guide**

The *Governance Gain Planner* uses a Microsoft Excel® spreadsheet that enables you to sort your governance improvement initiatives in a variety of ways, such as by priority, category, primary responsibility, start or end date, or a combination of two or more factors.

The planner includes eight columns of information:

1. **Priority:** You may label each governance improvement initiative as a level 1, 2 or 3 priority. If you type a 1 (the highest priority) in the cell, the cell will turn red; typing a 2 will turn the cell yellow; and typing a 3 will leave the cell white.
2. **Category:** Each governance improvement initiative may be correlated with a “category” of governance improvement. The category numbers, abbreviations and full descriptions are included in a tab at the bottom of the *Governance Gain Spreadsheet* entitled “Gov. Improvement Categories.” The categories correspond with the ten areas assessed in the full governance self-assessment questionnaire.
3. **Governance Improvement Initiative:** You may type here a detailed description of an initiative to be undertaken that is designed to result in governance gain in the category area.
4. **Projected Outcomes:** You may type here specific goals and outcomes that will be achieved as a result of the completion of the governance improvement initiative.
5. **Primary Responsibility:** You may type here the individual, individuals, or committee/group primarily responsible for ensuring the governance improvement initiative is completed.
6. **Resources Required:** You may type here the estimated cost of implementing the initiative.
7. **Start Date:** You may type here the assigned date for work on the governance improvement initiative to begin.
8. **End Date:** You may type here the target date for completion of work on the governance improvement initiative.

### **Customizing the Header to Include Your Hospital’s Name**

- Select *View – Header and Footer* from the menu bar at the top of the screen.
- Click on the “Custom Header” button to modify the header. Change “Your Hospital Name” to the name of your hospital. Click “OK.”

### **Creating Additional Rows**

- Click on the spot where you would like your new row to appear (a black box will appear around the cell you selected).
- Select *Insert – Row* from the menu bar at the top of the screen.
- A new row will appear above the cell you have selected.
- Your new row will have the same properties and formatting as the row immediately above it.

### **Deleting Rows**

- Left-click on the number to the left of the row you would like to delete. For example, if you would like to delete row 10, click on the number 10 on the left side of the spreadsheet. The entire row will turn blue.
- Leaving the row highlighted, right-click in the same spot (using the example above, you would right click with your mouse on the number 10), and select “delete.” The row will be deleted.

### **Sorting Initiatives by a Specific Category**

- Highlight the rows you would like to sort by placing your mouse on the left-hand side of the screen over the number “2” (indicating row number two). Your cursor will turn into a right arrow. Click on the number two with your left mouse button, and drag your mouse down while holding the left button down until all of the rows with information have been selected (the selected rows will turn blue).
- Leaving the rows highlighted, selected *Data – Sort* from the menu bar across the top of the screen.
- In the bottom of the pop-up window that appears, make sure “Header Row” is selected under “My data range has.”
- In the “Sort by” selection at the top of the pop-up window:
  - Select the drop-down menu and choose the column you would like to sort by (such as priority, category, primary responsibility, or end date).
  - Select whether you would like information to be sorted ascending (lowest at the top, highest at the bottom) or descending (highest at the top, lowest at the bottom).
  - If you would like to sort by a second column, indicate your selection in the same manner in the next item, titled “Then by.” For example, you could sort by priority in the first criteria, and by finish date in the second criteria to see all the top priority items in order of their finish dates.
  - When you have indicated all items you want to sort, click “OK.”
- You may follow the steps above at any time to sort the data by a different category.