Chapter Leader Toolkit

Updated December 2014

Institute *for* Healthcare Improvement

This toolkit offers resources and suggestions to help you recruit students, manage your Chapter, and spread the word about the IHI Open School.

All of these resources – and some additional tools – can be found in the "Chapter Leader Resources" section of the IHI Open School website. Still can't find what you're looking for? Let us know at openschool@ihi.org. We are committed to supporting the important work you're doing!

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Welcome to the IHI Open School Chapter Leader Network

Dear Chapter Leader,

Congratulations on your new role and welcome to a community of more than 600 Chapter Leaders. We are thrilled to have your leadership and dedication to improve health care worldwide. This movement truly begins with you – with your commitment to change the way health professionals work, interact with one another, and deliver care. By providing resources and opportunities often otherwise unavailable at your institution, you are equipping your members to be agents of change. Health care systems aren't going to fix themselves — it is, to quote Paul Batalden, MD, going to take the "the combined and unceasing efforts of everyone." While your colleagues may care about patient safety and quality improvement, it is through your leadership that they will be able to address the issues and challenges they will face in their future careers.

In addition to your role on campus, you are an integral member of the Institute for Healthcare Improvement community. You amplify our reach and capacity for change, help us lead locally, and serve as an icon for improvement success. We want to thank you for your involvement by showcasing your work, supporting your continued engagement and professional growth, and promoting the value of your leadership to health care institutions worldwide.

This Chapter toolkit is essential for all Chapter Leaders, and contains information to help you get started on operating a successful, vibrant Chapter. In these pages, we share advice and best practices from other successful Chapters. I encourage you to look for opportunities to build on other Chapters' successes by developing new ways to improve yourself, your school, and your health system. Keep in mind that this is just one of the resources available to Chapter Leaders. We look forward to sharing more great resources with you through:

- The IHI Open School website and weekly newsletter

- IHI Open School Regional Chapter Leaders

- The Annual IHI Open School Chapter Congress

- IHI National and International Forums and conferences

- Regional Chapter calls and events

Don't forget to share your progress, your experiences, and any of your potential challenges with me and the IHI Open School team. We're here for you. We wish you and your Chapter all the best and look forward to your successes and accomplishments.

Sincerely,
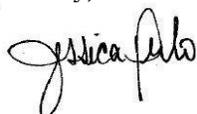
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Overview

The Institute for Healthcare Improvement (IHI) is a reliable source of energy, knowledge, and support for a never-ending campaign to improve health care worldwide. We aim to improve the lives of patients, the health of communities, and the joy of the health care workforce. One of the many programs within IHI, the IHI Open School is an initiative to advance health care improvement and patient safety competencies in the next generation of health professionals worldwide. It's an important goal — one not currently fulfilled by the curriculum at most health professions schools.

IHI Open School Mission

We aim to advance health care improvement and patient safety competencies in the next generation of health professionals worldwide.

Launched in September 2008, the IHI Open School encourages students of medicine, nursing, dentistry, pharmacy, health administration, public health, and other allied health professions to participate on a voluntary basis, at no charge. The online educational community features extensive content and resources for participants, as well as a network of local Chapters that organize events and activities on campuses across the world. Here's what the IHI Open School can offer you:

- **Online courses written by world-renowned faculty.** Take our online courses – in quality improvement, patient safety, leadership, patient- and family-centered care, population health, and managing health care operations, which are free to students, residents, and faculty. Boost your skills anywhere you have Internet access.

- **A network of students and educators like you.** Connect with students and faculty from other professions, states, and countries through our network of Chapters.

- **The IHI Open School Basic Certificate of Completion.** Complete a set of 16 online courses and earn a certificate that shows employers you're serious about improving care.

- **Case studies, exercises, videos, featured articles.** Discover a bounty of other online resources available on our website and in our mobile app.

- **Experiential learning opportunities.** Complete the IHI Open School Quality Improvement Practicum by conducting a quality improvement project at your local institution.

Introduction To IHI Open School Chapters

An IHI Open School Chapter is a face-to-face, interprofessional group at your institution. Each Chapter is unique. It brings students from different health professions programs together through a shared interest in learning about quality improvement and improving care for patients. IHI Open School Chapters exist on university campuses or in health care organizations, creating a forum for like-minded students and residents to interact and help each other gain skills to improve care. The IHI Open School provides Chapters with opportunities to learn more, network with peers, connect with engaged and supportive faculty, and accomplish scholarly activities such as publishing and presenting work.

Chapter Goals and Objectives

- Generate local awareness of – and excitement for – quality improvement, patient safety, and leadership among the next generation of health care professionals.

- Advance quality improvement and patient safety competencies locally.

What do IHI Open School Chapters do?

Here are some examples of what IHI Open School Chapters do:

- Take IHI Open School courses.

- Host events for students and residents interested in quality improvement at their organization or with other Chapters in their region.

- Conduct quality improvement projects.

- Facilitate activities/exercises available on the IHI Open School website.

- Participate in educational reform to incorporate quality and safety into their formal curriculum.

Who is Involved in IHI Open School Chapters?

Typically, Chapters are based on university campuses and include schools of nursing, medicine, health administration, pharmacy, engineering, business, and other health professions. Chapters also form at hospitals, health systems, and other health care organizations. Some health care delivery sites have started Chapters to provide an informal opportunity to train staff, engage new professionals in improvement, and train students rotating through their organizations. (In this structure, we encourage you to identify local students to participate in the Chapter.)

Chapter Leader Role and Responsibilities

Anyone willing to help form and lead the Chapter can be the Chapter Leader. Students or residents usually lead Chapters, although faculty and deans can also serve the role. Chapter Leaders:

- Recruit students and faculty.

- Facilitate events and activities that provide learning and networking opportunities.

- Connect with other Chapter Leaders, locally and internationally, to share ideas and best practices.

- Advocate for patient safety and quality topics to be included in their formal curriculum.

Faculty Advisor Roles and Responsibilities

Faculty Advisors are faculty members, attendings, professors, deans, employers, or anyone willing to advise and support the Chapter. If possible, the Faculty Advisor should have a permanent position at the organization to promote continuity within the Chapter. Faculty Advisors:

- Advocate for the Chapter as an organization officially recognized by the institution's administration. To support this aim, offer advice about — and ways to obtain — funding for Chapter activities.

- Participate in Chapter meetings — for example, facilitate discussions about videos or case studies—and assist with planning activities, as needed.

- Help the Chapter Leader ensure continuity of the Chapter over time (i.e., transfer of Chapter Leadership from year to year).

- Identify local opportunities for students to work on patient safety and quality improvement projects and initiatives.

What will I get if I start or join an IHI Open School Chapter?

If you start or join an existing Chapter, here are a few opportunities you can look forward to:

- Boosting your skills in patient safety and quality improvement in health care within an interdisciplinary setting.

- Putting your knowledge of patient safety and quality improvement to work in local health care organizations.

- Publishing work on IHI's website and potentially in peer-reviewed journals.

- Being among the first to hear about new courses and content from the IHI Open School.

- Networking and sharing ideas with like-minded students, faculty, and employers from around the world.

- Collaborating on IHI Open School resources — including courses and case studies — with like-minded peers and colleagues.

Starting a Chapter

There are several things to do when starting a new IHI Open School Chapter at your school or institution. Some suggested best practices are listed below. Please note that these are merely suggestions and not requirements to becoming an IHI Open School Chapter.

☐ Determine Your Chapter Leadership

Most Chapters start with a small but dedicated group of leaders. To find leaders, start with your own friends and colleagues, and then branch out to build your base. Some Chapters hand select highly involved and enthusiastic members to lead the group and others welcome nominations from members, create applications, and/or conduct a formal election process. Refer to the **Sustainability section on page 19** to learn more about how to create a success plan for your Chapter to guarantee sustainability.

It is important to define the leadership structure for your Chapter in order to ensure sustainability from year to year. Host a discussion about the structure of your Chapter and review the **Chapter Leadership Structure section on page 9** for more information on leadership structures.

☐ Identify a Faculty Advisor

Faculty Advisor are integral parts of a Chapter. Faculty Advisors can help find new members, plan events, connect health professionals with Chapter members, and offer career and academic advice. They also provide continuity within your Chapter from year to year, which is essential for Chapter sustainability.

Any member of the faculty, staff, or administration at your school can serve as a Faculty Advisor. Consider the following recruitment strategies during your search:

- Approach faculty who teach relevant topics and reach out to attendees at health care-related events.

- Identify a prospective Faculty Advisor based on what they teach, their role on campus, or their demonstrated passions.

- Post a "wanted" ad on a student webpage, a bulletin space, or via a blast email to your student body.

Once you have identified a potential Faculty Advisor, plan to set up a meeting with him or her to discuss the mission, purpose, and goals for your Chapter. It is important to be prepared for this discussion and to set clear roles and expectations from the start. (See the **Faculty Advisor roles and responsibilities on page 6** to learn more.)

☐ Register Your Chapter with the IHI Open School

To be recognized as an IHI Open School Chapter, you must complete the Chapter Enrollment Form found on the IHI Open School website. The form asks you to explain why you are starting a Chapter, the disciplines represented in your Chapter, and the contact information for the primary and secondary contacts for your Chapter (which can be Chapter Leaders or Faculty Advisors). Once you have submitted your enrollment form, you will receive:

- A welcome email from us confirming your registration as an IHI Open School Chapter and the announcement of your Chapter in our weekly newsletter.

- Inclusion in our online Chapter directory.
- Access to our Chapter Leader and/or Faculty listservs so that you will be able to communicate with the rest of the IHI Open School community members.

☐ Register Your Chapter with Your School or Institution

Most schools require student organizations to register with an office which governs student groups on campus (i.e. Office of Student Activities, administration, or Student Government). Although it is not required by the IHI Open School to be officially registered with your school, we find that registered Chapters have better support from their institutions.

☐ Develop Chapter Mission and Goals

As you establish your Chapter, it is important to determine your Chapter's priorities. You'll need to decide why patient safety and quality improvement are important to you and your Chapter, and how you will contribute to the cause.

We recommend drafting short- and long-term goals, and assigning one team member the responsibility of tracking progress. Good goals are specific, measurable, achievable, connected to the IHI Open School mission, and set up to help you achieve other goals in the future. Use the sample charter located in the Chapter Leader Resources section of our website to help you reflect on the unique aspects of your Chapter and to meet school requirements, if any. Remember that these are preliminary goals and are adjustable as your Chapter expands.

☐ Recruit New Members

Chapters with committed members are more likely to be successful — and the more members your Chapter has, the more you will be able to accomplish. Spreading the word about your new IHI Open School Chapter is the first step to recruiting new members. Turn to the **Recruitment section on page 11** to find ideas and tips for recruiting new members.

☐ Host an Introductory Meeting

Your introductory meeting sets the stage for a successful Chapter. It is the ideal occasion to introduce your fellow students, residents, or colleagues to the "quality gap"— the gap between ideal care and the care that people actually receive. Use this meeting to rally support for your cause and publicize your Chapter to the community at-large.
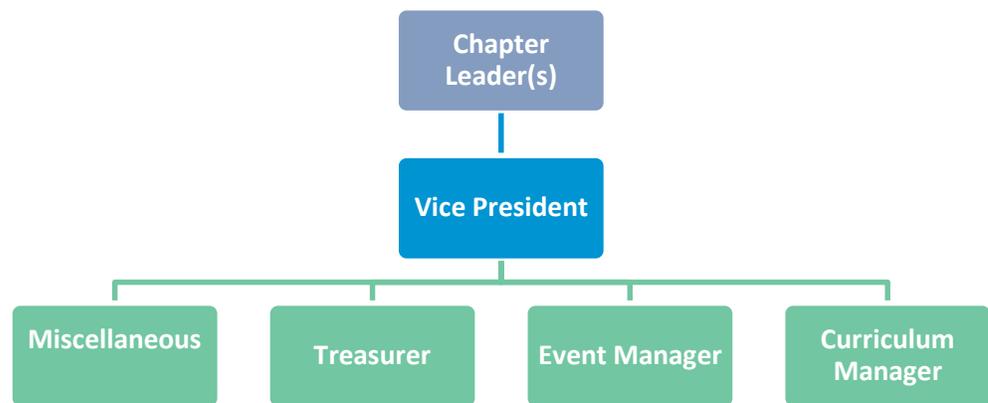
Articulate your Chapter's vision and purpose clearly, and offer a preview of the work you'll be doing this year to encourage attendance at future meetings and events. The goal of creating a presence for your Chapter is to build membership, so remember to collect contact information and provide timely, friendly follow-up. Look for extra tips and resources in the **Planning and Hosting Events section on page 15**.

Chapter Leadership Structure

Chapters choose to set up their leadership structure in a variety of ways, including board, dual, flat, and multi-campus leadership structures. Some explanations and models of the various leadership structures are outlined below:

A. Board Structure

The board structure provides a hierarchical organization of your Chapter, in which roles and responsibilities are clearly defined. If your Chapter is interprofessional, you might have one Chapter Leader from each of the different professions, or you might have a single Chapter Leader and multiple vice presidents, each representing a different profession.

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                    │  Chapter         │
                    │  Leader(s)       │
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This structure is most often helpful if your Chapter is large or growing. You may also wish to create smaller groups within the Chapter to work intensively on specific areas using this structure.

B. Dual Leadership

Within this model, one of the Chapter Leaders is responsible for the internal management of the team, whereas the other is responsible for external contacts. If you choose dual leadership, it is recommended that you have a clear and logical division of tasks. For instance, work could be divided internally/externally by profession or by another sensible separation.

It is important to create an overview of all the responsibilities assigned to Chapter Leaders and intentionally divide them into two sections. Dual leadership is undoubtedly a challenge, especially if your Chapter is large and you don't know the other Leader very well. One of the common pitfalls of dual leadership is that it's relatively easy for one person to be the "real" leader and the other to be a sidekick. A clear division of tasks and responsibilities is thus crucial for the success of this structure.

A hypothetical model of dual leadership

| External	Internal
•Contact with the IHI team	•Coordination of team
•Contact with Faculty Advisor	•Administration
•Contact with dean/hospital administration	•Team meetings
•External communication	•Internal Chapter communication

C. Flat Structure

If you started your Chapter recently, or if you have relatively few Chapter members, a flat structure might be more appropriate.

In this structure, it is important to manage transitions and handoffs clearly to maintain continuity and role clarity.
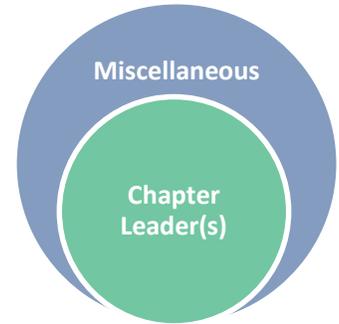
D. Multi-Campus Leadership

Some Chapters have representatives from campuses located in different places. This can provide logistical challenges, but also unique opportunities. We recommend that multi-campus Chapters recruit a Chapter Leader from each campus, and then consider implementing a board structure to organize resources and events. For instance, the Atlanta Chapter, made up of students from Georgia Institute of Technology and Emory University, has summarized its structure in this figure:
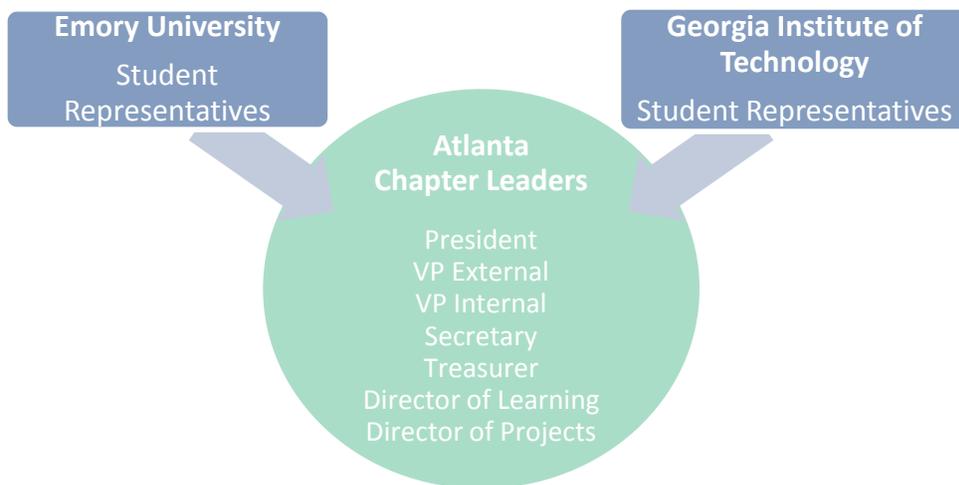
Recruitment

Recruitment is a major part of running a successful Chapter. Seek a range of health professional students and residents with varied years of graduation. Interprofessional Chapters have the potential to reach a larger audience, an increased likelihood of staying active, and the opportunity to strengthen interprofessional communication and teamwork. Health professions students and residents are notoriously busy, which can often make it difficult to convince new members to join your Chapter. Some strategies and suggestions for you to incorporate in your recruitment efforts are listed below.

Develop a Chapter Pitch

Develop a pitch about your Chapter for a convenient and effective way to market the important work that you're doing, but be prepared to vary your message depending on your audience. Use examples from a person's specific discipline or profession to personalize your conversation. Here is a template to help design your pitch:

- **Overview:** Who you are, how long you're going to take, what information you're going to cover.

- **Introduction:** Describe your Chapter, your mission/goal, how long the Chapter has been on campus, and any other important information about the group.

- **Legitimize your group:** Describe your Chapter's most recent success or what it's best known for on campus.

- **Problem:** Describe your Chapter's current campaign or project.

- **Solution:** What your group is doing about the problem.

- **Involvement:** What students and residents can do to get involved.

- **Other Issues:** Any other projects or campaigns your Chapter works on.

- **Personal Appeal:** Why you got involved.

- **Thanks:** Thank your audience for their time and attention.

Creating a Recruitment Plan

Creating a recruitment plan will help your Chapter organize resources and follow through with ideas. Use your entire team to help you recruit by discussing recruitment tactics and assigning responsibilities. Consider the following:

Timing of campus events such as activity fairs or orientations. Be aware of finals schedules or other complications.	**Resources** such as flyers, bookmarks, and other promotional material to distribute on campus or present during meetings and events.	**Ownership** of action items. Ask questions like, "Who will print materials?" or "Who is responsible for setting up our table?"

The IHI Open School can provide you with recruitment materials to pass out on campus or at events. Just send us an email at openschool@ihi.org to place your order.

Recruitment Strategies

There are generally two methods of recruiting new members: personalized recruitment and mass marketing. Personalized recruitment has a small reach and aims to recruit passionate Chapter members through personal interactions. Mass marketing reaches more people and generally uses less time and resources. Here are some recruitment ideas with this "personalized to mass marketing" spectrum in mind:

- Personally invite a friend, classmate, or colleague to a meeting and follow up with them so that they attend.

- Set new member goals, and challenge Chapter members to bring a new friend or colleague to a meeting or event. Reward whoever brings the most people.

- Host a networking event or an event that will appeal to a large audience, such as a film screening.

- Have Chapter Leaders connect with faculty and organize brief classroom visits. Prepare leaders to speak to benefits of joining the Chapter and hand out materials, invite students to a future event, or show a short video about the IHI Open School. Send Chapter representatives to speak with new students at orientation events.

- Attend a university-wide career or activity fair. Prepare a clear message and a single action item for interested students. Hand out promotional materials to interested students and capture their information so that you can follow up with them once the event is over.

- Post recruitment flyers and meeting announcements on bulletin boards or other areas around campus. Be creative – some student groups even advertise with flyers in bathrooms.

When considering where to recruit, be flexible and consider recruiting in a range of settings:

Activity Fairs, Career Fairs, & Tabling

Prepare a clear message and a single action item for interested students. Be proactive, visible, and friendly. Hand out promotional materials and other giveaways to interested students, and capture their information so that you can follow up with them.

Orientation Events

If your institution hosts orientation or networking events, send Chapter representatives to speak with new students. This can be done for both general orientations as well as events for specific disciplines on campus.

Classroom Visits

Have Chapter Leaders connect with faculty and organize brief classroom visits. Prepare leaders to speak to benefits of joining the Chapter and hand out materials, invite students to a future event, or show a short video about the IHI Open School.
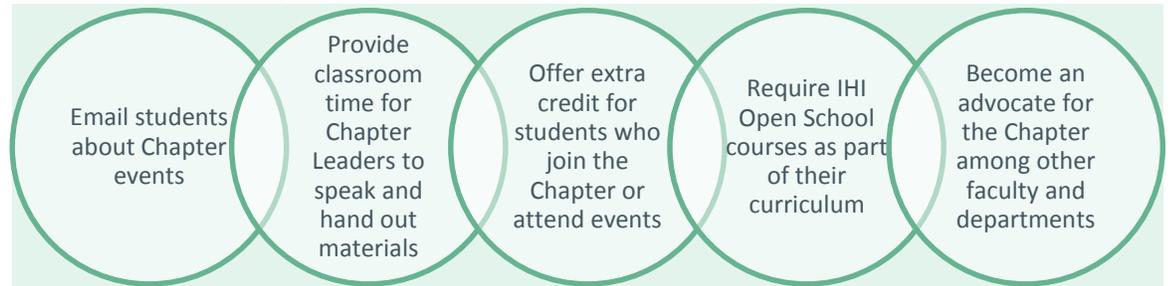
Self-Designed Events

Be creative and come up with your own activity to recruit students. You can set up a networking meet & greet where students, residents, and faculty come together for breakfast, a lecture, or another activity.

Publicity and Recognition

In order to continue to grow your Chapter membership, it is important to have strong publicity and to be recognized for your efforts. When holding special events, you should send news releases to your campus and local papers to announce the event and to summarize the event after it has taken place. Reach out to the community relations department at your institution (if there is one) to spread the word about your Chapter events and meetings at your institution. Many colleges and universities publish newsletters or an online listing of upcoming events. This is an easy way to get publicity. You should also send this information to the IHI Open School to be included in the Chapter News section of our newsletter so that you can invite other IHI Open School Chapters to your event. Every IHI Open School member is also encouraged to submit writings, including event write-ups and summaries, to the IHI Open School to be posted on the IHI Open School website and blog.

Engaging and Utilizing Faculty

Faculty members are strong allies during recruitment. Leverage your relationships with faculty and encourage them to speak about your Chapter in their classrooms and other venues. Well-known faculty can also provide a strong voice when you're trying to effect change on campus. Here are some ways faculty can get involved in recruitment:

Email students about Chapter events

Provide classroom time for Chapter Leaders to speak and hand out materials

Offer extra credit for students who join the Chapter or attend events

Require IHI Open School courses as part of their curriculum

Become an advocate for the Chapter among other faculty and departments

Engaging Members

Recruiting, engaging, and maintaining your members are some of the most important aspects of creating a successful Chapter. For many students and residents, involvement in an IHI Open School Chapter is their first introduction to quality improvement and patient safety.

Setting Membership Goals

Develop a plan to manage your member base by setting membership goals, creating a plan to meet them, and tracking your progress. Some basic goals to track can be a target number of new members per semester or year or percentage of members retained from year to year.

Engage New Members

Once you've recruited new members, the next step is to welcome and engage them in your Chapter activities. Keep a sign-in sheet at all events and send a personal welcome to each new member. Survey members periodically to understand their needs and interests. Use the survey results to develop Chapter goals, activities, and events. You can find examples of sign-in sheets, Chapter interest surveys, and other tools to engage your members on the **Chapter Leader Resource section** of our website.

Communicate with Your Members

Chapters that communicate regularly have higher member retention and participation at meetings and events. Although websites and social networks are a good way to communicate announcements and news, you should not rely on these as your sole method of communication. Many Chapters create newsletters to inform new and existing students and/or residents of upcoming events, recommended courses, relevant articles, opportunities from IHI, and other educational opportunities.

Encourage Ongoing Member Involvement

As your Chapter grows, you may notice that many students and residents will sign up to join your Chapter, but won't get involved. Here are a few ideas to help you encourage ongoing involvement:

- **Membership Point System:** Give your members points based on their involvement and participation in meetings and events. The points can earn them access to funding to attend national events or certificates for involvement.
- **Leadership Opportunities:** We have found that members are more likely stay involved if they are given leadership opportunities. Many students and residents cannot commit to year-long leadership roles within your Chapter; however, you will find that many want to be involved in running the Chapter on a smaller scale. Divide responsibilities into smaller jobs and send around a sign-up sheet with opportunities to help at upcoming events during your Chapter meetings. This will encourage your members to help out and become involved on a smaller scale.

Planning and Hosting Events

It's important for Chapters to run effective meetings and events to engage your community and amplify your impact. Consider the following logistical questions and work together as team to distribute ownership of the tasks.

- **When will the meeting or event be held?** It is important to be conscious of your members' schedules when choosing the best time for a meeting. Here are some quick tips on scheduling your meeting or event:
  - Schedule around classes or incorporate into classes. Alternate meeting time of day/day of week every few months to accommodate more schedules.
  - Join meetings with other interprofessional student organizations.
  - Co-sponsor with existing events and groups on campus.
  - Use Doodle.com to find the best times to meet.

- **What will the agenda look like?** Make your meetings and events valuable for your members by tailoring them to their specific needs. Here is a suggested agenda for your meeting:
  - Welcome and thank attendees for coming. If the group is small enough, you may want to have everyone introduce themselves and their discipline by doing an informal icebreaker.
  - Introduce the Chapter leadership with personal statements — have everyone say a few words about why they became involved in this initiative and why the work is important to them.
  - Run an activity that will engage attendees. Review the **Chapter Activity Center** and the **School Resources** of our website to find learning exercises, ideas, discussions, games, and case studies.
  - Open the meeting to questions and answers.
  - Post the date, time, and location of your next meeting or activity, and ask students and residents to fill out the sign-up sheet to join the Chapter.
  - Invite students and residents to socialize after the meeting to discuss ideas for activities and follow-up opportunities.

- **Who will facilitate the meeting/event?** Facilitators keep the meeting discussion on track and within established time limits. This is also a great way to give your Chapter Leaders and members a chance to build leadership skills.

- **Where will you host the meeting/event?** Key factors to consider when choosing a location are that it is accessible to the attendees and has the adequate facilities for your activity. If your Chapter consists of multiple disciplines, mix up your meeting locations to accommodate your members.

- **Will you provide food for attendees?** If you have a budget for food, arrange food or snacks for the meeting if possible.

- **What are the best ways to promote the meeting?** The most successful meetings and events are those that have high attendance and participation. Contact more students and/or residents than you hope will attend. Invite your Faculty Advisor, dean or assistant dean, and

other interested faculty to attend the meeting. Post fliers and ads for your meeting around campus. Utilize department bulletin boards, campus newsletters, and university calendars to increase visibility.

- **Who will take minutes?** It is helpful to take meeting notes to capture attendees, decisions and considerations, and next steps. Notes are also useful to distribute to your members that were unable to attend the meeting or event.

- **Who will follow up with attendees after the meeting?** Follow up by sending an email to attendees within a couple days. Thank them for their time and interest, and provide information about upcoming meetings and events. Also provide your contact information and invite them to evaluate the meeting — what went well, and what needs to be improved for future meetings and activities. Encourage them to invite other students and residents to the next meeting.

Suggested Chapter Meeting Activities

Here are some ideas you can use during your Chapter meetings or events:

- Review IHI Open School online courses together.

- Use case studies from the IHI Open School website followed by discussion.

- Invite guest speakers or students with clinical experience to share their knowledge with the Chapter. Consider inviting faculty from other professions.

- Invite friends or loved ones to talk about their personal health care experiences.

- Invite policy or advocacy organizations to speak at meetings.

- Use a simulation center if available or role play cases.

- Ask your local health system to join its Morbidity & Mortality debrief.

- Join local awareness campaigns (e.g. National Patient Safety Week activities).

- Talk to clinicians about patient education activities such as creating patient brochures to improve health literacy.

- Contact quality or process improvement personnel at your local health system to link your Chapter with ongoing efforts.

Visit the **Chapter Activity Center** in the Chapter Leader Resources section of our website to find activities and ideas for your next Chapter meeting or event. The Chapter Activity Center includes Chapter learning exercises, ideas, discussions, games, and case studies.

Share your successful event ideas or concepts with the IHI Open School Chapter Network on our blog by emailing openschool@ihi.org.

Finances and Fundraising

Chapter Finances

There are no fees or annual member dues required to start or maintain an IHI Open School Chapter; however, it is the responsibility of the Chapter to acquire any funds necessary to carry out programs and initiatives. Use this guide to find suggestions and tips for fundraising.

Institutional Support

Ask your school administration for support and apply for funding through your student life office. Securing a Faculty Advisor and registering your Chapter on campus can help increase your eligibility for funding, meeting space, and connections to health system sponsors.

Fundraising

While not required, fundraising is an excellent way to support Chapter activities and events. Review university policies and state laws prior to soliciting donations or hosting fundraising events. Co-hosting events with similar student groups will increase the effort put into your fundraising plan, and also allow you to build connections and relationships with other organization for future partnerships.

Here are a few examples of how other Chapters have raised funds:

- Charge Chapter dues per semester or year.

- Charge small entrance fees at events to cover the cost of food, drinks, or a speaker.

- Organize a sale to raise awareness and funds for your Chapter. Consider selling t-shirts, water bottles, refreshments, or even entry into a softball or Frisbee tournament.

- Conduct an auction or raffle with prizes donated from local organizations.

- Solicit donations whenever possible – whether it's for a speaker, food for an event, or permission to screen a film.

- Challenge another group or organization to a competition like a cook-off or penny-war.

Grants And Scholarships

Grants may be available through your school, or may be awarded based on your community or the goals of your work. To search for grants, ask for help at your school's Office of Student Activities. We also suggest looking into applying for existing scholarships from local and national organizations, universities, and associations.

Managing Chapter Funds

It is important to draft a Chapter budget early in the year to make sure that your Chapter Leaders have the necessary knowledge to execute fundraising efforts and apply for appropriate funding. Use the budget template found on the Chapter Leader Resources Section of our website to determine your Chapter's financial needs.

Consider selecting a Chapter Leader to act as a treasurer or financial officer dedicated to managing the Chapter budget, setting priorities for spending, recording income and expenses, and identifying fundraising opportunities.

Campus agency accounts or off-campus bank accounts may be useful in maintaining accurate records of income and expenses, and is required at some sites to transfer grant funds. US Chapters that don't have university local bank accounts and are interested in administering their funds should apply for an Employee Identification Number, the equivalent for an organization of the individual Social Security Number (SSN) or Taxpayer Identification Number (TIN). The IRS provides general information to student groups regarding EINs, which are required for establishing a bank account.

Tax Exemption and Reporting in the United States

All Chapters are expected to comply with the regulations of their organization, and must also comply with applicable federal and state tax laws. IHI's tax exempt status does not extend to its Chapter organizations. Filing federal and state returns for an organization and complying with related federal and state tax laws is the responsibility of each Chapter or region.

Chapters should investigate whether they can register with their Secretary of State as a non-profit, with the federal government as a 501(c)(3) group, or as a charitable organization.

How can we receive tax-deductible donations?

Some Chapters are asked for their "tax I.D. number" when establishing bank accounts, receiving funds from businesses, or accepting donations. Tax donations to student organizations are not tax deductible for donors, unless they are made to the university through your agency account. For more information, contact your Office of Student Affairs or Finance department.

Fundraising in the United Kingdom

The Institute of Fundraising has developed Codes of Fundraising Practice and Code of Conduct to provide a guide to the law and best practice in relation to fundraising activity throughout the United Kingdom. The Bar Pro Bono Unit is a good resource for the rules and regulations about raising money for non-profit activities: http://www.barprobono.org.uk/index.php?cID=264

Sustainability and Succession Planning

Sustainability

Planning for Chapter sustainability is vital to your success as a Chapter and should happen the moment you create your Chapter. There are many things that your Chapter can do to maintain momentum and keep your Chapter in good standing.

- **Regularly recruit members from ALL class levels.** Along with growing your Chapter's size, new members will also bring new energy and ideas. Review our **Recruitment section on page 11** for more tips on putting together an interdisciplinary team.

- **Develop standard work.** Keep a record of processes, timelines, contacts, materials, budgets, and lessons learned for events that will repeat to save time and improve year to year.

- **Create a strong Chapter community.** Make community building a priority by allowing members to share personal stories and get to know one another during meetings and events. To connect with the larger Chapter Network, encourage your members to register on IHI.org to receive emails from the IHI Open School team about relevant opportunities and Chapter news.

- **Update the IHI Open School.** The IHI Open School is able to guide you, offer advice, and help you form connections with IHI and the IHI Open School Chapter Network. However, we must be informed of your current Chapter Leaders and faculty in order to do this properly. This can be done easily by emailing openschool@ihi.org the contact information of your Chapter Leaders and any other updates you wish to share.

Succession Planning

Succession planning should be part of your Chapter's strategic plan. Your Chapter should be ready for leadership transition to take place before the end of the school year or semester so that your new Chapter Leaders have time for mentoring and coaching before officially taking on new roles. There a few important things to address during this transition to ensure that your successors are set up for success. Follow these tips to help streamline the process:

- **Make a plan.** Leadership transition should occur at the end of the school semester or year — whenever is the best time for the Chapter — so that your new leaders are prepared when their role officially begins at the beginning of the next semester or year. Some Chapters get distracted by final exams during the transition time and, as a result, leave with an incomplete leadership team. To avoid this problem, you should plan for the leadership selection and transition process in advance.

- **Identify potential leaders.** Once you make a plan for transitioning your leadership team, you'll need to decide on the process for selecting new leaders that works best for your Chapter. (Will Chapter members apply for positions or will they be nominated? Will the future Chapter Leaders be chosen by the current leaders or by the Chapter? Will candidates be selected by majority or by consensus?) Once you've decided on the process for selecting leaders, begin to start the process of identifying your new leaders. This should happen as early as possible before these members commit to other responsibilities.

- **Collect important information for incoming Chapter Leaders.** Your knowledge of running your Chapter is important to the success of incoming Chapter Leaders. But you need to make sure to collect the information in a way that will be useful to them. Remember to record best practices and information that may be useful to successors. Examples include contacts, Chapter structure documentation, and a resource list. It is important to be able to pass along this potentially overwhelming amount of knowledge in a digestible manner. We recommend filing this information in a binder or folder so that the incoming leader will have it at hand as he or she begins the position. We encourage you to connect to this toolkit and the Chapter Leader Resource section of our website when going through this process.

- **Update the IHI Open School team.** As mentioned before, it is important to inform the IHI Open School team of all of the active contacts for your Chapter to ensure consistent communication between the IHI Open School and your Chapter. After you have finalized your succession planning and leadership transition for the year, email openschool@ihi.org with the contact information for all of the members of the team and let us know who is graduating and no longer an active leader or advisor.

Community Network

Support from the IHI Open School Team

The IHI Open School team comprises a small group of full-time staff at the Institute for Healthcare Improvement in Cambridge, MA. The team manages the growing community and creates new content to help achieve its mission of advancing health care improvement and patient safety competencies in the next generation of health professionals worldwide.

E-mail openschool@ihi.org to get in touch with the IHI Open School team. The IHI Open School Community team can:

- Help you start your new Chapter.

- Work with you to set your Chapter goals.

- Brainstorm ideas to recruitment, raise funds, and host events.

- Provide useful Chapter resources.

- Connect you with other IHI Open School Chapter Leaders in the community.

Connect to the Community

The IHI Open School community is a diverse group of students, residents, faculty members, and health professionals. Working with other Chapters in the IHI Open School is a great way to network and engage with other health care professionals. Students can connect face-to-face at national or regional events, or virtually by email.

To facilitate collaboration with other Chapters, we have created a few ways for you to connect via email listservs. Please note that you must be an active contact in the IHI Open School Chapter database. Contact openschool@ihi.org to make sure that your contact information and Chapter role is updated to ensure that you are a member of the appropriate listserv.

- **Chapter Leader and Faculty Advisor listserv:** The IHI Open School maintains listservs with all of the Chapter Leaders and Faculty Advisors. Use these listervs to connect with the community at large. The Chapter Leader listserv is Chapterleaders@ls.ihi.org and the Faculty Advisor listserv is IHI_facultyadvisors@ls.ihi.org.

- **Email listservs by region:** The IHI Open School has also created email listservs that include Chapter Leaders within specific geographic regions. Contact your regional listserv:
  - continentaleurope_chapters@ls.ihi.org
  - latinamerica_chapters@ls.ihi.org
  - midwest_chapters@ls.ihi.org
  - northeast_chapters@ls.ihi.org
  - southeast_chapters@ls.ihi.org
  - southwest_chapters@ls.ihi.org
  - unitedkingdom_chapters@ls.ihi.org
  - westcoast_chapters@ls.ihi.org

Regional Chapter Leaders

The IHI Open School community is growing at a rapid pace. The Regional Chapter Leaders will help localize the IHI Open School, provide assistance to your Chapter based on their experiences, and assist with planning regional events. Contact your Regional Leader to stay connected to local events and opportunities.

US: Midwest Ryan Miller and Sarah Miano mw.ihi.openschool@gmail.com	Supports Chapters in: Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin
US: Northeast Ross Hilliard and Valerie Pracilio ne.ihi.openschool@gmail.com	Supports Chapters in: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont
US: Southeast Ashley Kay Childers and Kimberly Scott seihiopenschool@gmail.com	Supports Chapters in: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, Washington, D.C.
US: Southwest Jake Reynolds sw.ihi.openschool@gmail.com	Supports Chapters in: Arizona, Kansas, New Mexico, Oklahoma, Texas
US: West Coast Kelsey Priest wc.ihi.openschool@gmail.com	Supports Chapters in: Alaska, California, Colorado, Hawaii, Montana, Nevada, Oregon, Utah, Washington
Continental Europe Jo-Inge Myhre ce.ihi.openschool@gmail.com	Supports Chapters in: Belgium, Denmark, Germany, Greece, Italy, Norway, Portugal, Spain, Sweden, The Netherlands
Latin America and Caribbean Vanessa Lizette Vizcarra Munguia, Dolores Machiavello, Marlene Pérez Colman, Rodrigo Poblete, and Ezquiel Garcia-Ellorio openschoollac@gmail.com	Supports Chapters in: Argentina, Brazil, Chile, Colombia, Dominican Republic, El Salvador, Mexico, Panama, Peru, Puerto Rico, Uruguay, Venezuela
United Kingdom and Ireland Andy Carson-Stevens uk.ie.ihi.openschool@gmail.com	Supports Chapters in: England, Ireland, Northern Ireland, Scotland, Wales

If your Chapter is located in an area that is not assigned a Regional Leader, please contact openschool@ihi.org.

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