Preparing Your Chapter for Sustainability and Transitions

Thursday, May 10, 2018
Welcome to today’s session!
Please use chat to “**All Participants**” for questions
For technology issues only, please chat to “Host”
WebEx Technical Support: 866-569-3239
Dial-in Info: Communicate / Join Teleconference (in menu)
Objectives

• Connect and support one another as leaders in the Open School community
• Share and discuss best practices – and challenges – that come with sustaining and transitioning Open School Chapters
• Provide space to discuss and collaborate common Chapter challenges on the topic
Today’s Agenda

• Welcome and Introductions
• IHI Open School Overview
• Sustainability and Transitions for your Chapter
• Group Exercise and Discussion
• IHI Open School Announcements
Type into the chat box:

Select “All Participants” as the recipient:

1. Name
2. Chapter Name (University/Organization)
3. What Chapter accomplishment are you most proud of from the last year?
4. What would you like to learn from today’s call?
Introductions

Sarah Jasim, MPH, PhD
Chapter Network Coach

Meghan Cowden, RN
Chapter Network Coach

Gina Deitz
Community Manager, IHI Open School
IHI Open School Mission

“Advance health care improvement and patient safety competencies in the next generation of health professionals worldwide.”
IHI Open School Courses

- 32+ online courses, including set of GME courses
- More than 4 million courses completed
- More than 600,000 learners have completed a course
- More than 120,000 learners have earned the Basic Certificate
- More than 1,500 universities and health care organizations using the courses
IHI Open School Community

- **500,000** students and residents registered
- More than **900** Chapters started in **90** countries
- Over **50%** of our Chapters are interprofessional
Project-Based Learning

Quality Improvement Practicum

1. Learner(s) complete required courses
2. Learner(s) identify local faculty, health system sponsor(s), and project
3. Learner(s) create: charter, cause and effect diagram, 2 PDSA cycles, run charts, summary
4. Learner(s) complete project
5. IHI approves and awards Practicum Certificate of Completion

Leadership & Organizing for Change

1. Improvement Science
2. Organizing & Leadership Training
3. Subject Matter Knowledge

Change
Sustainability and Transitions for your Chapter
Overview

• Part 1: Sustainability
  ▪ Infrastructure
  ▪ Leadership Team
  ▪ Chapter Direction/Long-term Planning

• Part 2: Succession Planning
  ▪ Succession Planning
  ▪ Leadership Transitions
Part I: Sustainability
Where and when to begin?

- Begin to prepare your Chapter for transitions from the start! **Building a sustainable starts now.**

- What contributes to a strong, sustainable Chapter?
  - Infrastructure & Standard Work
  - Leadership team
  - Faculty advisors
  - Recruitment
  - Chapter AIMs and long term plans for how you will achieve them

What else do you think promotes Chapter sustainability? Feel free to share in the chat!
Infrastructure & Standard Work

- Organization is key!
- Define your norms around communication – methods, expectations, how and when you’ll stay connected
- **Keep easily accessible records of anything relevant to your Chapter's work**
- Start the year with a set of regular, scheduled leadership team meetings
- Take the time build your Chapters annual timeline
- Create resources for future members of your leadership team (budgets, contacts, materials, log in information)
Leadership Team

- Strong leadership is essential for sustainability
- Clearly identify your leaders and define their roles
- Team structure should be flexible but defined (examples below)
  - Anticipate needed roles/ jobs/ responsibilities as your Chapter changes

Further details on these leadership structures are in the Chapter Leader Toolkit
Faculty Advisors

- Faculty advisors are essential for long-term Chapter sustainability
  - University-based Chapters: Turnover is to be expected as students graduate
  - Organization or hospital-based Chapters: Residents-led Chapters will also experience turnover as they move to full-time positions; Employee-led Chapters can benefit from a more senior-level advisor who has been there for a long time and brings valuable institutional knowledge
- Clearly define this role – for you, and the advisor – as well
- Anticipate that faculty advisors will eventually transition, too
Recruitment

- Consistent, planned recruitment is necessary
- Recruit from all years/ levels
- If recruiting from multiple disciplines/ programs, work to maintain at least one updated contact (faculty or student)
- Utilize recruitment to build community within your Chapter!
Chapter AIMS & Long-Term Planning

• Always define and revisit Chapter AIMS throughout the year – and create long-term and short-term ones
• Consider a Chapter mission and vision statement
• Anticipate changes and plan for them in relation to your long-term Chapter plans
• How are you celebrating your achievements as a team?
• Keep a long-term mindset:
  • How are you tracking toward your AIMS?
  • Where will your Chapter be in 3 months? 1 year? 3-5 years?
Part II: Succession Planning
Succession Planning

• Anticipate and plan for leadership succession. Consider:
  ▪ How often does leadership transition?
  ▪ When does leadership transition?
  ▪ What is the process for leadership transitions?
Leadership Transitions

• Plan for formal transition meetings
  ● Can be conducted 1:1 or in a group setting
• When possible, give new leadership team members time to learn
  ● Elect leadership 1-2 months before end of year so new leadership can be mentored/learn on the job
  ● Vice president to president transitions
• Provide resources and contact information for new team members
  ● Official transition form (see next)
**Example: Chapter Transition Document**

IHIOS Transitioning Form
Please use this as a way to prepare for transitioning in the spring.

Name:  
Position:  
Year:  
Email:  

<table>
<thead>
<tr>
<th>Key Contacts</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td><strong>Position/Organization</strong></td>
<td><strong>Email</strong></td>
<td><strong>Notes</strong></td>
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<td><em>Why is this person a key contact? What did they help you accomplish? Etc.</em></td>
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<td></td>
<td><strong>Action Items</strong></td>
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<td></td>
<td><em>Have you contacted this person about the transition? Have you let them know the date for next year yet? Etc.</em></td>
</tr>
</tbody>
</table>
Big Picture Timeline: (Key steps-event planning, VAP form, EPF, talking to certain people, what to accomplish over the summer...)

*Before spring semester ends:*

*Over the summer:*

*During fall semester:*

*During spring semester:*
Group Exercise and Discussion
Chapter Case Study and Discussion – 10 minutes

• You’ll be placed in break-out sessions with other call attendees
• Review a specific Chapter case study and discuss the following:
  ● Is there anything you would change about the Chapter’s current structure?
  ● Is there anything you would change about the transition process?
  ● What are your recommendations for this Chapter going forward?
• Please select one person to debrief your group’s discussion
The founders of the IHI Open School Chapter at Beantown University are graduating after leading the Chapter for two years. Although Chapter interest and membership has grown, they are worried about who will take on their roles once they are gone and what will happen to the Chapter.

- As they work to form a new leadership team, what advice would you give the founders of the Chapter as they make this transition?
- What barriers stand in the way of a smooth transition?
- Has your Chapter ever gone through a successful transition? What made it successful?
Group Discussion – 10 minutes

Breakout groups:
• Describe your scenario.
• What solutions or recommendations were discussed?

Full group discussion:
• What other best practices can you share from your experience?
• What other questions do you have for the group on this topic?
Wrap Up and Announcements
Connect Globally Through the IHI Open School

Connect with other Chapters across the network with the click of a button

1. Find a Chapter
2. Email a Chapter

www.ihi.org/education/IHIOpenSchool/Chapters/Pages/ChapterDirectory.aspx
Review the Chapter Leader Toolkit

- Tips for sustainability and succession planning
- Quick links to Chapter resources
- Examples of successful leadership team structures

www.ihi.org/OpenSchool
Update the IHI Open School

As you look ahead to leadership team transitions at the end of the year, be sure to update your Chapter’s contact information!

Look for the link Chapter homepage on the IHI Open School website or email us at openschool@ihi.org.
Annual Chapter Progress Reports

- Due by **Friday, May 28**
- Required to maintain active status in Chapter Network, and to qualify for Chapter funding
- One response needed per Chapter
- Complete it today through the link below:
  
  https://www.surveymonkey.com/r/PQB56WZ
Let us know if you’d like to connect!

Contact us to set-up a coaching call or discuss general Chapter inquiries:

- **New Chapter Coaches:**
  newchaptercoach.ihi.os@gmail.com

- **Global Chapter Coaches:**
  globalchaptercoach.ihi.os@gmail.com

- **Chapter Network Coaches:**
  chaptternetworkcoach.ihi.os@gmail.com

- **Open School Team:**
  openschool@ihi.org
Upcoming Chapter Network calls

- **Leading for Change** - *Monday, May 21, 5:00 - 6:00 PM (EST)*

- **Curriculum Integration: Making Quality a Priority at your Institution** - *Monday, June 18, 5:00 - 6:00 PM (EST)*

- **Recruitment and Prepping your Chapter for a New Year** - *Monday, August 20, 5:00 - 6:00 PM (EST)*
Thank you!