Chapter Network Call – Recruitment & Relational Tactics

September 9, 2019
12:00 – 1:00 PM (ET)
WebEx
Welcome to today’s session!
Please use chat to “All Participants” for questions
For technology issues only, please chat to “Host”
Follow the instructions in the pop-up box to connect your audio (either by phone, or through your computer)
Objectives

1. Understand the steps for mapping actors and effective recruitment, particularly as it relates to your Chapter and Recover Hope Campaign work

2. Explore a mapping example from the Open School Chapter at Wright State University

3. Explore recruitment tactics and discuss best practices
Today’s Agenda

- Welcome and Introductions
- IHI Open School Overview
- Stakeholder Mapping Overview and an Example from Wright State University
- Recruitment Overview
- Discussion
- Debrief and Next Steps
Help us get to know you!

In the chat box, select “All Participants” as the recipients and share:
- Your Name
- Chapter Name (University/Organization)
- What motivated you to join or start your Open School Chapter?
- What would you like to learn from today’s call?
IHI Open School Team

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Our Mission

“Advance quality improvement, patient safety, and leadership competencies of health and health care professionals worldwide.”
Our Strategy

Online Courses
Educational modules and activities

Community
Interprofessional Chapters and networks

Project-Based Learning
Guided experiential training

IHI OPEN SCHOOL
Online Courses

- **30+** online courses in Improvement Capability, Patient Safety, Person- and Family-Centered Care, Triple Aim for Populations, Leadership – all free to students, residents, and faculty
- **Almost 800,000** students and residents registered on IHI.org and taking courses
- **More than 4 million** course completions
- **More than 1,500** institutions use the courses as a core part of their training programs or curriculum
Project-Based Learning

Leadership & Organizing for Change

- Improvement Science
- Organizing & Leadership Training
- Subject Matter Knowledge

Change
IHI Open School Community

- **800,000+** students and residents registered
- Over **950** Chapters started in over 95 countries
- Over **50%** of our Chapters are interprofessional
Stakeholder Mapping

Hannah Flath
Program Coordinator, IHI Open School
Community Organizing Theory of Change

People:
Recruiting and developing leaders

Power:
Building a community around our leadership to create power

Change:
Using our collective power to create change

... people acting together to change the status quo
Organizing & Mobilizing

What are the similarities and differences?

We *mobilize* large numbers of people to act.

We *organize* with a group of leaders willing to take responsibility for mobilizing others to achieve our aims – and to scale, spread and sustain them.
Ladder of Engagement

- **Aware**
  - Affiliated with Open School

- **Interacting**
  - Commit discrete amounts of time

- **Engaging**
  - Commit increasing amounts of time and resources

- **Committing**
  - Commit to outcomes

- **Leading**
  - Commit to leadership

- **Organizers (Leaders)**

- **Mobilizers (Activists)**

Number of committed people
Activities on the Ladder of Engagement

- Join a leadership team
- Host an event
- Volunteer
- Behavioral change regularly
- Behavioral change 1x
- Attend an event
- Sign a pledge
- Engage in social media
Why Map Actors & Assets?

- Recognize people as our greatest asset
- Build our strategy on existing assets
- See the “system” of stakeholders and how they connect
- Reframe relationship between traditional hierarchies
  - develop “power with” instead of doing “to” or “on behalf of”
Who Are Our People?

- **Constituency**
  - Leadership
- **Support**
  - Individuals & organisations
- **Competition**
  - Individuals & organisations
- **Opposition**
  - Individuals & organisations

**Shared Values**

**Opposed Values**
Chapter Example: Wright State University
What were they trying to achieve?

**Goal:** Stabilize and reduce the number of people dying from drug overdoses in Montgomery County.

**Capacity Building:** Launch two projects in which students can get hands-on QI experience before May 26, 2017.

**Leadership Development:** Have 20 students representing at least 3 different health professional programs involved the Student Opioid Coalition by May 26, 2017.

**Aim statement:** We will reduce, the drug overdose mortality rate in Montgomery County by 10% by building the capacity of interprofessional members of the Student Opioid Coalition in partnership with people suffering from opioid use disorder by December 1, 2017.
Wright State Map of Actors

**Constituents:**
- Student Opioid Coalition
  - Students (Medical, Pharmacy, Nursing)
  - People living with SUD

**Leadership:**
- Nick Christian
- Michael Holbrook
- Caleb Tang
- 5 student project leaders

**Supporters:**
- COAT
- County Public Health
- County Alcohol, Drug & Mental Health Pharmacies

**Competition:**
- Coursework
- Other QI efforts
- Other student groups

**Opposition:**
Organizations or people that rely on substance use dependence?
Outcomes

- 55 students engaged in the Student Opioid Coalition
- 7+ programs represented
  - Medicine, pharmacy, nursing, SW, public health, professional psychology, pre-medicine
- 5 project leaders identified

**Project 1: Narcan Training**
- 35 students attended
- 70 doses of Narcan distributed

**Project 2: Medication Disposal Kit Project**
- 40 pharmacy locations
- 500 disposal kits stocked
Some Lessons

• Actors can have multiple identities (i.e. support, constituency, opposition, etc.)
• It is a ‘living’ map – update as you go
• The map itself is an asset!
• Understand actors and assets in relation to their values and interests to create a basis for mutual exchange
Relational Tactics to Recruit Stakeholders
What makes for effective recruitment?

Think of a time when someone asked you to do something. What about how that person asked made you want to do it, or what about it made you not want to participate?
Recruitment

Good recruitment builds your Chapter!

• People don’t participate without being asked.
• A personal ask goes much further than an email in getting new people involved.
• We need to constantly develop new leadership and involve new people in the work over time.
Relational Recruitment Tactics v. Social Media

• Social media is a tool to:
  – Communicate and share information
  – Build a culture around an effort
  – Mobilize action (i.e. Mobilizing)

• It is not a substitute for building relationships!
What makes for effective recruitment?

- **Have an urgent and hopeful reason** – even with little time or resources, folks will make an effort for a compelling reason.
- **Personal appeal** – often people get involved because of the person who asked them to, not the job or the task.
- **Persistence** – be confident with your ask; stress the importance of the work of your Chapter & campaign.
- **Make it fun!**
3 Tactical Components to Commitment

1. Seek commitment

2. Secure commitment

3. Sustain commitment
1. Seek Commitment - Making the Ask

The Five C’s:

1. **Connection**: Share why you care to elicit values
2. **Context**: Contrast the urgent challenge with a hopeful opportunity
3. **Commitment**: Ask for clear commitment
4. **Confirm**: Follow up to secure the commitment
5. **Catapult**: Invite others to take on real responsibility
1. Seek Commitment – Making the Ask

- If you aim for 15 attendees, invite 50
- Personal, direct asks made in-person or by phone
- Individualized email invitation and follow up phone call
- Not everyone will answer the first time you call them, so set up several chunks of time to do invite calls

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2. Secure Commitment

- Recruit
- Confirm
- Thank
- Celebrate
- Evaluate
- Action
- Confirm
- Confirm
- Confirm
- Confirm
2. Secure Commitment

- Do reminder calls: everyone who says they'll come to your event should also get a reminder
  - Email a week before with objectives, agenda & logistics
  - Reminder text/email 48 hours
  - Reminder call the day before

Never underestimate the strength of the relational strategy!
3. Sustain Commitment

• Greeters: Leadership team member whose specific role is to welcome attendees.
  - Greet new attendees as they arrive, and circulate through the group or crowd to make sure you’ve reached everyone.
  - Use a sign-in sheet!!
  - Invite attendees to join your Chapter or Recover Hope campaign in a specific way.
3. Sustain Commitment

• Follow-up with new people: a phone call from a leadership team member a few days after an event
  - Don't rely on email to do this follow-up
  - Before the event, make a plan for personal follow-up
  - Example: plan to divide up names from sign-in and make outreach calls a few days after the event.
Relational Tactics

- **1:1 meetings**: to identify & recruit leaders and get to know our constituency
- **House meetings**: to build community around the effort
- **Leadership team & Chapter meetings**: to build relationships between those leading the work
- **Action events**: to build relationships among those taking action
- **Leadership trainings**: to introduce relationship building as a skill
Final Thoughts

• It’s going to be hard, and you’re going to get some “no’s”
  — There are different types of no’s
  — You’re giving folks an opportunity to live into their values, not everyone is ready or willing

• Framework, not a formula

• Action motivators overcome action inhibitors

• It’s all about the people

• What is our ultimate goal?
Discussion
Discussion

• Who are “your people”? What assets do they have?
• How will you use your stakeholder and asset map to develop recruitment tactics?
• How many people do you aim to recruit to attend your Chapter meeting or Recover Hope Campaign event?
• What methods of communication will you use to reach those people?
• After this call, who are you going to seek and secure a commitment from first?
Next Steps
Next Steps

- Interested in receiving coaching from an IHI Open School Coach? Email openschool@ihi.org!
- There’s still time to register for the fall offering of Leadership and Organizing for Change, which starts this Thursday, September 12!
- Register for the National Forum, which will be in Orlando from December 8 – 11!
  - Submit a storyboard to present at the Forum by October 4
- Get involved in the Recover Hope Campaign by hosting a Recovery Month event in your local community!
We aim to improve the lives of 50,000 people affected by substance use disorders by April 2020.

**AWARENESS**
Raise awareness and reduce stigma with a focus on equity

**PREVENTION**
Prevent substance use disorders and unhealthy substance use

**TREATMENT & RECOVERY:**
Improve treatment for individuals with substance use disorders

1. **Change the Narrative**
Sharing stories to raise awareness of substance use disorders as a chronic disease, reduce stigma, and confront systematic oppression underlying substance use

2. **Save Lives from Overdose**
Train individuals to recognize overdoses and intervene by administering naloxone

3. **Improve Pain Management**
Support best practice opioid prescribing and alternative pain management in health systems

4. **Reform Curricula**
Promote education and training on prevention, diagnosis, and treatment of substance use disorders into trainings, organizational events, resident programs, and university curricula
Recover Hope Campaign Timeline

- **Recovery Month Events**
  - *October 2019*

- **Leadership Academy**
  - *July 2019*

- **Change the Narrative Challenge**
  - *April – May 2019*

- **Kick-Off**
  - *December 2018*

- **Foundation**
  - *January – December 2018*

- **Aim**
  - *April 2020*

- **Evaluation & Next Steps**
  - *April – June 2020*
Recovery Month Events

Aim: Mobilize the OS network to help save lives from overdose through recovery-focused events rooted in harm reduction principles during SAMHSA Recovery Month

Ask: host an event in September related to recovery from SUD or prevention of overdose that is rooted in harm reduction principles

– Examples: 5k Recovery Run, house meeting on Harm Reduction, educational panel on overdose, naloxone training, etc.
– Goals: 25 chapters and 10 organizations to host an event
Feedback for us?

- What did you like about this call?
- What was missing?
- What would you like to see on a follow-up call?
Thank you!