Building Blocks for Success: Leadership Team Design and Transitions

March 21, 2017
• 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)
Type into the chat box:

Select “All Participants” as the recipient

1. Name

2. Current or former Chapter Name
   (University/Organization)

3. How long have you been involved with your Chapter?

4. What would you like to learn from today’s call?
Today’s Agenda

• Welcome and Introductions
• IHI Open School Overview
• Leadership Structure Design and Transitions
• Team Meeting Design
• Questions/Discussion
• Wrap-Up
Where are you calling in from?
Introductions – Facilitators and Presenters

Luke Lewis, Midwest Regional Leader

Gina Deitz
Community Manager, IHI Open School

Becka DeSmidt
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.”
Online Courses
Educational modules and activities

Community
Interprofessional Chapters and networks

Project-Based Learning
Guided experiential training

IHI OPEN SCHOOL
IHI Open School Courses

• 32+ online courses developed by world-renowned experts, including a set of GME courses
• Close to 4 million courses completed
• More than 500,000 learners have completed a course
• More than 94,000 learners have earned the Basic Certificate
• More than 1,000 universities and health care organizations using the courses
• CEU and MOC credit available
IHI Open School Community

- 500,000+ students and residents registered
- Close to 850 Chapters started in 85 countries
- Over 50% of Chapters are interprofessional
What do Chapters do?

- Take IHI Open School courses, and review them together
- Host events at their organization or with other Chapters in their region
- Conduct quality improvement projects
- Participate in national campaign efforts
- Facilitate activities/learning exercises with other students, residents, and health professionals
- Participate in educational reform to incorporate quality and safety into their formal curriculum
Connect with a local Chapter with the click of a button
Project-Based Learning

Quality Improvement Practicum

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

I-CAN: Leadership & Organizing for Change

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

Change
IHI Open School
Quality Improvement Practicum

Learner(s) complete required courses

Learner(s) identify local faculty, health system sponsor(s), and project

Learner(s) create: charter, cause and effect diagram, 2 PDSA cycles, run charts, summary

Learner(s) complete project

IHI approves and awards Practicum Certificate of Completion
Practicum learners are:

- Reducing pre-term deliveries
- Increasing vaccination rates
- Creating discharge guidelines
- Improving access to interpreters
- Encouraging advance care planning
- Reducing wait times in clinics
- Promoting medication reconciliation
- Preventing errors
I-CAN: Leadership & Organizing

- Ten-week semi-synchronous online course:
  - 30-45 minutes of video lectures a week
  - 60-minute group coaching calls
  - 1-3 hours of application a week

- Participants learn and apply leadership practices in field-based projects to improve health
I-CAN learners are:

• Improving access to behavioral health services
• Addressing substance use and its impact on communities
• Encouraging greater physical activity and better nutrition
• Serving vulnerable members of their communities, like the homeless, refugees, the isolated elderly
• Improving quality of care for diabetic patients
Leadership Structure Design and Transitions
A few things to consider

- Form follows function
- Be inclusive and intentional
- Avoid backwards steps
- Faculty are your friends
- Leverage your culture of improvement
University of Cincinnati
Open School 2016-2017
UCOS Leaders

• 25 Student Leaders
  – Dental hygiene
  – Pharmacy
  – Physical Therapy
  – Medicine
  – Nursing
  – Nutrition

• Social Work also involved, but no leader this year
Leadership Structure

UCOS Leadership Structure

Recruitment Committee
- Director
- Recruitment Coordinators (8)
- Volunteer Coordinators (2)

Development Committee
- Finance Manager
- Supplies Manager
- External Marketing Leader
- IHI Liaison

Steering Committee
- Directors (2)

Service Committee
- Director
- Data Entry Managers (4)
- Quality Improvement Coordinators (1)
- Community Outreach Coordinators (1)
- Nutrition Leader (2)
Transition Process/Timeline

- Applications are sent out to all trained volunteers and colleges involved with Open School (January 10\textsuperscript{th})
- “Meet and Greet” session for interested volunteers (January 24\textsuperscript{th})
- Applications due (February 1\textsuperscript{st})
- Decisions made (February 14\textsuperscript{th})
- Acceptance made (February 21\textsuperscript{st})
Transition Process/Timeline Cont.

- Transition Meeting (March 7th)
- Kickoff Meeting (April 4th)
- Kickoff Meeting Part 2 (April 18th)
- 1st Meeting (May 9th)
Application

Application for 2017-2018 Open School Leadership
Due Date: February 1st @ 5pm

Name: ________________________________
College: ________________________________
Year in School: __________________________

The Open School is an interdisciplinary group of students and faculty who aim to create future healthcare leaders and improve our local community’s health. We are currently looking for passionate, capable new leaders from all UC health professions schools to continue during the 2017-2018 year.

Please fill out the application and provide a brief description below. E-mail applications to ucopenschoolleaders@gmail.com. Please email this document as an attachment with your name as the file name (Last name_first name) as well as a photograph of yourself.

Please rank the positions in which you are interested in below (see attached position descriptions):
1.
2.
3.

All Open School Chapter Leaders are expected to help staff the UCOS Clinic at St. Vincent de Paul at least once a month.

Are you available on at least one Saturday morning a month? Yes or No

Will you be in Cincinnati and available during the summer months? Yes or No

What extracurricular activities are you currently involved in/plan to be involved in during the upcoming school year, including leadership positions?

In 1-2 paragraphs, briefly describe why you are interested in Open School and what skills you would bring to the group and the position(s) for which you are applying. Describe one goal for the upcoming year for the position for which you are applying or for the chapter as a whole.
Making the Decision

• All applications are sent to the group email so all current leaders can read them
• Create an Excel spreadsheet of all applicants and their top 3 choices
• Essays from the application is consulted when deciding between applicants
• Meet and Greet attendance is considered
• Profession is considered in positions that have more than one leader
IHI Open School Emory University – Organization Overview

Co-Presidents

VP of Education
- Director of IPE
- Director of Education (x2)

VP of Projects
- Director of Projects (x2)

VP of Operations
- Treasurer
- Secretary

School Representatives (x10)
IHI Open School Emory University - Transition Overview

**Basic Timeline:**
- Recruit and train in the Spring
- New team fully active starting Summer through following Spring

**Lessons Learned:**
- Interview standardization
- Small team breakout sessions
- Summer activities
## Transition Checklist and Timeline

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Team Member Responsible</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review leadership team roles and responsibilities/reach consensus on any changes</td>
<td>Co-Presidents/Leadership Team</td>
<td>12-14 weeks prior to transition</td>
</tr>
<tr>
<td>Prepare applications</td>
<td>VP of Operations</td>
<td>10 weeks prior to transition</td>
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<tr>
<td>Send out applications</td>
<td>VP of Operations</td>
<td>8 weeks prior to transition</td>
</tr>
<tr>
<td>Applications due</td>
<td>NA</td>
<td>6 weeks prior to transition</td>
</tr>
<tr>
<td>Interview applicants</td>
<td>Co-Presidents &amp; other outgoing leadership team members</td>
<td>4 weeks prior to transition</td>
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<tr>
<td>Vote</td>
<td>Leadership Team (open to all IHI membership)</td>
<td>2 weeks prior to transition</td>
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<tr>
<td>Confirm new team members</td>
<td>Co-Presidents</td>
<td>2 weeks prior to transition</td>
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<tr>
<td>Orient new team members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Combined leadership team meeting</td>
<td>Leadership Team</td>
<td>1 week prior to transition</td>
</tr>
<tr>
<td>Small team breakout sessions</td>
<td>Incoming/Outgoing teams</td>
<td>1 week prior to transition</td>
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<tr>
<td>Inform advisors and other mentors</td>
<td>Co-Presidents</td>
<td>1 week prior to transition</td>
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<tr>
<td>Update web and other internal communications</td>
<td>Secretary</td>
<td>0 week prior to transition</td>
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Leading a Successful Team Launch Meeting
A few tips from our course on leadership and community organizing

• The importance of distributing leadership
• Leading a strong team meeting – especially during times of transition
• Setting norms to help your team work together effectively
Common leadership structures

Everyone is a leader

Hierarchical

Lone ranger
What is leadership?

‘Leadership is accepting responsibility for enabling others to achieve shared purpose in the face of uncertainty.’

- A practice, not a position
- Authority is earned, not bestowed
- Focus is on developing others, not just yourself

- Grounded in values, interests & assets
- Built through relationships
Interdependent and distributed leadership model

Snowflake model
What is the purpose of a team launch or relaunch meeting?

- Build relationships between members
- Identify shared values and a shared purpose
- Explore measures of success
- Decide how or whether to expand, reduce, or alter the composition of the team
- Develop norms and work practices
- Surface strategic questions to guide your work
<table>
<thead>
<tr>
<th>Agenda Item</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review agenda; recruit note-taker and time-keeper</td>
<td>3 minutes</td>
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<tr>
<td>Share personal stories</td>
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<tr>
<td>- Why do you aspire to be a part of this team?</td>
<td>2 minutes per person</td>
</tr>
<tr>
<td>- What does this team’s work mean for you given your personal values and motivations?</td>
<td></td>
</tr>
<tr>
<td>Establish team’s shared purpose</td>
<td>15 minutes</td>
</tr>
<tr>
<td>- First individually then together, brainstorm who you are leading, what your aims are, how you will accomplish those aims, and by when</td>
<td></td>
</tr>
<tr>
<td>Review key relationships and capabilities members bring</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Discuss strategic priorities</td>
<td>As much time as needed</td>
</tr>
<tr>
<td>Establish norms of conduct</td>
<td>10 minutes</td>
</tr>
<tr>
<td>- Create a norm for decision-making and a way to hold the team accountable</td>
<td></td>
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<tr>
<td>Clarify immediate next steps</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Evaluate the meeting:</td>
<td>5 minutes</td>
</tr>
<tr>
<td>- Key insights</td>
<td></td>
</tr>
<tr>
<td>- What went well?</td>
<td></td>
</tr>
<tr>
<td>- What should we improve?</td>
<td></td>
</tr>
</tbody>
</table>
Examples of norms

**Always:**
- Engage in honest, open debate
- Ask questions
- Start on time & stay on time
- Be present and engaged
- Come prepared to contribute
- Plan an agenda in advance
- Clarify understanding
- Create clear next steps
- Offer support

**Never**
- Engage in personal attacks
- Jump to conclusions
- Come unprepared
- Check emails / use phone during meetings
- Assume you have agreement
- Assume tasks are getting done
- Volunteer for a task you won’t be able to follow through with
Your ideas!

• How are your teams structured?
• Have you led a team relaunch meeting like this one?
• What norms have you set with your teams?
• How do you keep each other accountable to those norms?
Q&A
Questions and Open Discussion

- What has worked well and where have you been challenged in relation to:
  - Your leadership team structure?
  - Your leadership teams have transitioned?
  - Your team meetings?

When chatting:
- Raise your hand to let us know you have a question or comment
- Please use chat to “All Participants” for questions
Wrap Up
Update the IHI Open School!

*Changes in your leadership team? Let us know!*

Update your Chapter’s contact information from the Chapter homepage on the IHI Open School website or email us at openschool@ihi.org.
Thank you!

Questions? Ideas? Want to connect?

Luke: mw.ihi.openschool@gmail.com

IHI Open School Team: openschool@ihi.org