IHI Open School Course: Leadership & Organizing to Improve Population Health

Course Dates:
March 3 – April 28, 2016 (Celebration call: May 5, 2016)

Course Structure:
The course includes eight weeks of independent learning, team meetings, and scheduled coaching, built around the following key components:
- Weekly video lectures
- One-to-one calls with Open School coaches
- Several 60-minute expert coaching calls
- Weekly work to apply leadership and organizing skills in field-based projects
- Office hours for individualized support

Overview and Goals:
This course is intended for those who want to learn how to improve population health by exercising leadership to engage others. Participants will learn community organizing and leadership practices and apply them in field-based projects as the cornerstone component of the IHI Open School Change Agent Network (I-CAN).

The impetus for I-CAN is both the rapidly evolving health needs of our communities and the lagging health education systems charged with training our future leaders. We believe we can make strides to improve health and health care globally by combining this unique educational experience with learners’ leadership and their knowledge of local settings.

I-CAN brings together IHI’s expertise in improvement science, proven organizing and leadership practices, and subject matter knowledge from experts in the field to make these changes around the world:
I-CAN aims to:

- Increase learners’ knowledge and skills in leadership, community organizing, population health, and improvement science
- Facilitate learner-initiated improvement projects in communities around the world
- Activate a broad learning network of improvers
- Demonstrate how an interprofessional and distributed leadership approach can create pathways to improvement
- Improve IHI Open School capability to mobilize future cohorts of learners

Course Faculty:

**Donald Berwick, MD, MPP, FRCP**
Dr. Berwick is the President Emeritus and a Senior Fellow at IHI, an organization that he co-founded and led for more than 20 years. In July 2010, President Obama appointed Dr. Berwick to the position of Administrator of the Centers for Medicare & Medicaid Services, a position he held until December 2011. A pediatrician by background, Dr. Berwick has served on the faculty of the Harvard Medical School and Harvard School of Public Health, and on the staffs of Boston Children’s Hospital, Massachusetts General Hospital, and the Brigham and Women’s Hospital.
Email: openschool@ihi.org

**Mary Dolansky, PhD, RN**
Dr. Dolansky is an Associate Professor at the Frances Payne Bolton School of Nursing at Case Western Reserve University (CWRU) and Senior Fellow in the Veterans Affairs Quality Scholars Fellowship Program at the Louis Stokes Cleveland VA Medical Center. Dr. Dolansky is Director of the Quality and Safety Education for Nurses Institute. She has co-published two books on quality improvement education, co-authored several book chapters and articles, and was guest editor on a special quality improvement education issue in the journal *Quality Management in Health Care*. She has taught the interdisciplinary course “Continual Improvement in Health Care” at CWRU for nine years. As chair of the Quality and Safety Task Force at the school of nursing, she helped integrate quality and safety into the undergraduate and graduate nursing curriculum. She is Co-director of the VA Transforming Primary Care Center of Excellence to implement and evaluate a longitudinal interdisciplinary curriculum for medical residents and nurse practitioner students and is active on the CWRU Josiah Macy Jr. Foundation grant to implement interprofessional education for pre-licensure students in the health care professions.
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**Derek Feeley, DBA**
Derek is President and CEO of the Institute for Healthcare Improvement (IHI). He previously served as IHI’s Executive Vice President from 2013 to 2015, during which time he had executive-level responsibility for driving IHI’s strategy in five focus areas: Improvement Capability; Person- and Family-Centered Care; Patient Safety; Quality, Cost, and Value; and the Triple Aim. Prior to joining IHI in 2013, he served as Director General for Health and Social Care in the Scottish Government and Chief Executive of the National Health Service (NHS) in Scotland. In that role he was the principal advisor to the Scottish Government on health and health care policy and on public service improvement. He also provided leadership to NHS Scotland’s 140,000 staff in their delivery of high-quality health and health care. In 2013, Mr. Feeley was made a Companion of the Order of the Bath by Her Majesty, Queen Elizabeth II, in recognition of his services to health and health care.
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**Kate Hilton, JD, MTS**
Kate is Lead Faculty of the Institute for Health Care Improvement Open School’s Change Agent Network (I-CAN) and Engagement Lead Faculty to 100 Million Healthier Lives. She is Senior Faculty at ReThink Health, a Principal in Practice for Leading Change at Harvard University, and Faculty in the Management
and Leadership Development Program at Dartmouth College. She designs organizing efforts, teaches leadership skills, and strategizes with multi-stakeholder teams to take collective action to transform health and health care. Kate taught in Dr. Marshall Ganz’s organizing course at Harvard Kennedy School, and co-designed and led the first distance learning version for Harvard Executive Education. She works with partners such as the National Health Service of England, the Centers for Medicare and Medicaid Services, and others to adapt the tools of organizing to achieve the Triple Aim.

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Wendy Madigosky, MD, MSPH
Dr. Madigosky is the IHI Open School Faculty Network Advisor, and Director of the Foundations of Doctoring Curriculum and Associate Professor in the Department of Family Medicine at the University of Colorado Anschutz Medical Campus. Dr. Madigosky is involved in the on-going development of patient safety/quality improvement curriculum within the School of Medicine and is Advisor to the University of Colorado’s IHI Open School Chapter. She was co-project lead for Retooling for Safety and Quality, a Josiah Macy Jr. Foundation/IHI Open School initiative to integrate safety/improvement content into medical and nursing school curriculum in 2009-2010. In 2012, she was selected as a Josiah Macy Jr. Foundation Faculty Scholar and her project involves the development of interprofessional safety/quality improvement curriculum on the Anschutz Medical Campus.

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Rishi Manchanda, MD, MPH
Rishi Manchanda is chief medical officer of The Wonderful Company, a privately held $4 billion company committed to offering consumers high-quality, healthy brands. Rishi is also president of HealthBegins, an organization that provides healthcare providers with upstream quality improvement tools to improve care and the social determinants of health. Prior to joining the Wonderful Company, Rishi worked for the VA Greater Los Angeles Healthcare System, where he was the lead physician for homeless primary care, and for a network of community health centers in south Los Angeles, where he was first director of social medicine and health equity. In 2008, Rishi founded RxDemocracy, a nonpartisan coalition that promotes civic engagement and voter registration in doctors’ offices and hospitals nationwide. In his 2013 TEDbook, The Upstream Doctors, Rishi introduced a new model of the healthcare workforce that includes "upstreamists" who improve social determinants of health. Dr. Manchanda completed his training at Tufts University (BS, MD, MPH) and was the first graduate of UCLA’s Combined Internal Medicine and Pediatrics Residency. Rishi is a Fellow of the inaugural class of the Aspen Institute’s Health Innovators Fellowship and a member of the Aspen Global Leadership Network.

Jessica Perlo, MPH
Jessica is the Senior Community Manager of the Institute for Healthcare Improvement's Open School for Health Professions, an interprofessional educational program that provides health professional learners with the skills to become change agents in health care. She works closely with the network of Chapters around the world to foster their development and engagement with quality improvement, patient safety, leadership, and person- and family-centered care initiatives. She also works with expert faculty to support their involvement in the education of health professional learners around the world.

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Course Fees:
Students, residents, and faculty can participate in I-CAN free of charge. Health professionals can access I-CAN with a subscription.

Requirements for Certification:
Participation in the course requires 3-5 hours per week, including didactic education (video segments, readings), coaching, and time applying the new knowledge and skills in learners’ own communities. Time commitments will vary slightly each week, and the faculty has distilled the lectures and readings down to the essentials.
At the end of this course, learners will receive a special certification as change agents. In order to receive this certificate, learners must:

- Complete the pre-course assessment
- Watch all weekly videos
- Complete weekly assignments
- Complete the course summary document
- Attend all group coaching calls
- Complete the post-course evaluation

Course Participants:
I-CAN is intended to teach health professional learners how to lead and organize peers to improve the health of populations in their local settings. Please fill out a profile (including a photo, a short bio, and contact information) and learn about your peers on the course website discussion board.

Course Pedagogy:
The course will employ several pedagogical techniques to create a robust learning environment for learners. More specifically, the eight weeks will include:

- Experiential learning: Learners will choose and design a project that will allow them to use the skills they learn from the program.
- Asynchronous lectures: Learners will learn from video lectures (which include transcripts for easy reference).
- Synchronous coaching calls: Learners will participate in meetings with faculty, outside experts, and peers; learners will also have the opportunity to connect with subject matter experts during designated office hours.
- Self-study: Learners will explore readings, tools, and other resources related to their areas of interest.
Lessons

The course is intended to guide I-CAN leaders and is broken down into eight lessons. The IHI High Impact Leadership Framework provides context to the relevance and timeliness of each lesson topic. As described in the optional pre-program reading, the framework represents the critical areas in which leaders at all levels of health care delivery systems must focus to drive improvement and innovation to achieve Triple Aim results. Each lesson builds off — and cuts across — multiple domains of the framework.
Orientation: Released February 25, 2016

Description:
The orientation module will cover the purpose and structure of the course. We'll discuss course goals, introduce faculty, and describe how learners can get the most out of the learning experience. The course prerequisites will also create a foundation for the next eight weeks of learning with introductory education in population health and improvement science.

Objectives:
At the end of the orientation, learners will be able to:
- Explain the purpose and design of the IHI Open School Change Agent Network.
- Summarize the difference between organizing and mobilizing.
- Describe the course components, goals, and curriculum flow.
- List the tactics critical to finding success in the I-CAN program.

Faculty:
Donald Berwick, MD, MPP, FRCP
Jessica Perlo, MPH

Prerequisites:
- TA 101: Introduction to Population Health (prerequisite to be completed by February 25, 2016)
- IHI Open School whiteboard videos: Two on the Model for Improvement, two on Deming’s System of Profound Knowledge, and two on PDSA cycles (prerequisite to be completed by February 25)
- Create a profile on IHI.org (Click “My IHI” in the top navigation bar)

Assignment:
- Watch the Pre-Program orientation videos
- Introduce yourself on the I-CAN website discussion board
- Complete a pre-course assessment by March 2, 2016 at 12 PM (ET)

Additional resources (optional):
- Dr. Don Berwick’s Keynote Address, “A Report from Xanadu” at IHI’s 26th Annual National Forum (Available on IHITV)

Lesson 1: Introduction to Systems Thinking and “Upstreamist” Thinking: Released March 3, 2016

Description:
How can we see ourselves in the systems we seek to improve? What does it mean to call yourself an “upstreamist?” How can the health care workforce begin to systematically understand and address the social determinants of health? In this lesson, we’ll learn about systems thinking and “upstreamist” thinking as tools that can be applied to the improvement of health and health care around the world.

Objectives:
At the end of this lesson, learners will be able to:
- Discuss several urgent challenges facing the US health care system.
- Recognize the skills that are critical to becoming a systems thinker.
Syllabus

- Apply the basics of systems thinking to a population health problem.
- Summarize the Triple Aim and how it can improve health and health care.
- Define “upstreamist” as it relates to health care.
- Contrast an “upstreamist” model of health care with traditional models of health care.

Faculty:
Don Berwick, MD, MPP, FRCP
Rishi Manchanda, MD, MPH, Founder, HealthBegins

Assignment:
- Watch video lectures
- Complete “five whys” worksheet by March 9 at 12 PM ET
- Start thinking about your one-to-one meetings in Lesson 4, and reach out to 2-3 stakeholders you’d like to engage in your project to schedule a time to meet with them during that week (March 24 - 30).
- Download the project summary document to review. You won’t submit this until the end of the course.

Lesson 2: Organizing as a Leadership Practice: Released March 10, 2016

Description:
This lesson will take us deeper into organizing as a theory of change. We’ll learn about interdependent leadership skills and how to develop a strategy for an effective I-CAN project. We’ll also touch on how to develop an organizing sentence and understand strategizing as a leadership skill.

Objectives:
At the end of this lesson, learners will be able to:
- Discuss organizing as a theory of change.
- Illustrate how to apply interdependent leadership skills to an I-CAN project.
- Explain the basics of resourceful and adaptive strategizing.
- Write an organizing sentence and set a measurable aim for an I-CAN project.

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch video lectures
- Submit your project design worksheet by March 16 at 12 PM ET
- Articulate your project’s aim and submit your pledge to the I-CAN website by March 16 at 12 PM ET
- Optional subject matter support: If you’re having difficulty identifying a population health project topic, submit your questions to the IHI Open School

Additional Resources:
IHI Open School course, TA 102: Improving Health Equity. This IHI Open School course explores health disparities – what they are, why they occur, and how you can help reduce them in your local setting and might be one source to help you identify a population health improvement opportunity.
Lesson 3: Public Narrative: How to Craft a Call to Action: Released March 17, 2016

Description:
Why me? Why us? Why now? What is your vision and how do you motivate others to join you? In this lesson, we’ll learn why public narrative is an essential leadership skill. You’ll craft a story to call others to join you in action and learn how to coach others to develop their own narratives.

Objectives:
At the end of this lesson, learners will be able to:
- Explain why public narrative is an essential leadership skill.
- Explain the basics of how public narrative works.
- Illustrate how to use a public narrative to call others to action.
- Show others how use narrative effectively.

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch video lectures
- Submit a two-page story of self, us, and now for peer review by March 23 at 12 PM ET
- Begin using narrative to motivate others to action in your project

Lesson 4: Relational Strategizing: Released March 24, 2016

Description:
Relationships are the foundation of the work we do. Organizers build relationships among members of a constituency to create commitment to act toward a common purpose. As an organizer, how do you build relationships and capacity for your project? This lesson will cover how to develop a relational strategy, including mutual commitments and one-on-one meetings.

Objectives:
At the end of this lesson, learners will be able to:
- Explain why relationships are the foundation of our work.
- Define relationships in organizing.
- Develop and use a relational strategy to identify and recruit leaders.
- Practice building interprofessional relationships through one-on-one meetings.
- Identify the characteristics of leaders to recruit.

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch video lectures
- Provide feedback on three other narratives within the learning management system by March 30 at 12 PM ET
- Using the structure outlined in the Lesson 4 worksheet and conduct 2-3 one-to-one meetings.
  - Complete the one-to-one reflection section in the lesson worksheet by March 30 at 12 PM ET

Additional Resources:
Lesson 5: Stakeholder and Asset Mapping: Released March 31, 2016

Description:
Who are the individuals and organizations that can contribute meaningfully to your network? Where are your assets? And what power do you have? This lesson introduce stakeholder analyses and power mapping.

Objectives:
At the end of this lesson, learners will be able to:
- Explain why and how to map stakeholders and assets – to build power from within.
- Describe the method of asset-based community development (ABCD).
- Construct a map of assets, including interests, resources, and power.

Faculty:
Derek Feeley, DBA
Kate Hilton, JD, MTS

Assignment:
- Watch video lectures
- Submit a stakeholders map and assets map by April 6 at 12 PM ET

Additional Resources:
Kretzmann, J; McKnight, J. Discovering Community Power: A Guide to Mobilizing Local Assets and Your Organization’s Capacity. Asset-Based Community Development. Institute School of Education and Social Policy Northwestern University. 2005

Lesson 6: Teaming & Distributed Leadership Structures: Released April 7, 2016

Description:
Once we identify and recruit leaders, we need to make sure we work effectively toward our goals. In this lesson, we’ll talk about team structure and the value of a distributed leadership model. We’ll also cover why a shared purpose, shared roles, and shared norms are critical to success.

Objectives:
At the end of this lesson, learners will be able to:
- Create a snowflake diagram to illustrate a distributed leadership model
- Explain why structure matters within a team.
- Discuss the importance of having a shared purpose, shared roles, and shared norms.

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch video lectures
- Create a snowflake diagram to illustrate a distributed leadership model and submit the assignment by April 20, 2016 at 12 PM ET.
• Optional: Use the team diagnostic checklist and team agenda tools to assess your team’s performance and launch or relaunch your leadership team

Lesson 7: Creating Dynamic Interprofessional Teams: Released April 14, 2016

Description:
How do we go from working in silos to effective interprofessional teams? What will we gain from having strong interprofessional relationships? Different perspectives are critical to a project’s success. In this lesson, we’ll cover the interprofessional competencies we all need. We’ll also talk at length about teamwork and communication, and explain why focusing on both will make you a better leader.

Objectives:
At the end of this lesson, learners will be able to:
• Identify why an interprofessional mindset (both inside and outside the health care setting) can lead to creative solutions.
• Explain how teamwork contributes to a project’s success.
• Recognize how good interprofessional communication can contribute to a project’s success.
• Discuss the different roles and responsibilities of all health professions.
• Explain why coordinated, interprofessional care can lead to better patient care.

Faculty:
Mary Dolansky, PhD, RN
Wendy Madigosky, MD, MSPH

Assignment:
• Watch video lectures
• Post your revised organizing sentence to the Lesson 7 discussion board

Lesson 8: Mobilizing Measurable Collective Action: Released April 21, 2016

Description:
In this lesson, we’ll discuss what we mean by collective action. We’ll learn how to design tactics that motivate others to take action and increase our capacity. We’ll also cover how to engage others through collective decision-making. Finally, we’ll learn — and practice — how to ask people to commit to action in our projects.

Objectives:
At the end of this lesson, learners will be able to:
• Define collective action.
• Design tactics that motivate others to take action over time.
• Model how to ask people to commit to action, by seeking, securing, and sustaining commitments.

Faculty:
Kate Hilton, JD, MTS

Assignment:
• Watch video lectures
• Ask five people to commit to take action with you in service of your project aim
• Create and submit a project slide to highlight the results of your project by April 27 at 12 PM ET
• Submit your completed Project Summary document by April 27 at 12 PM ET
• Participate in a group coaching call
Week 9: Evaluation and Celebration, April 28 – May 5

Assignment:
- Complete the course evaluation by May 4

Course Assignment Summary

<table>
<thead>
<tr>
<th>Lesson</th>
<th>Assignment</th>
<th>Due Date</th>
<th>Call (WebEx)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-program Orientation</td>
<td>Pre-assessment, IHI profile</td>
<td>Feb 25</td>
<td>March 3 (Connection test only)</td>
</tr>
<tr>
<td>1 Systems Thinking</td>
<td>Five Why’s worksheet</td>
<td>March 9</td>
<td>March 10 (Coaching call #1)</td>
</tr>
<tr>
<td>2 Organizing</td>
<td>Strategizing worksheet</td>
<td>March 16</td>
<td>March 17 (Optional – Office Hours)</td>
</tr>
<tr>
<td>3 Motivating Vision</td>
<td>Public narrative worksheet, peer review</td>
<td>March 23</td>
<td>March 2 (Optional – Office Hours)</td>
</tr>
<tr>
<td>4 Relational Strategizing</td>
<td>1:1 meetings</td>
<td>March 30</td>
<td>March 31 (Optional – Office Hours)</td>
</tr>
<tr>
<td>5 Asset Mapping</td>
<td>Asset map worksheet</td>
<td>April 6</td>
<td>April 7 (Coaching call #2)</td>
</tr>
<tr>
<td>6 Distributing Leadership</td>
<td>Snowflake diagram; <em>optional</em>: team diagnostic checklist and launch/re-launch agenda worksheet</td>
<td>April 13</td>
<td>April 14 (Optional – Office Hours)</td>
</tr>
<tr>
<td>7 Interprofessional Teams</td>
<td>Post your revised organizing sentence</td>
<td>April 20</td>
<td>April 21 (Optional – Office Hours)</td>
</tr>
<tr>
<td>8 Mobilizing Collective</td>
<td>Project summary document, project slide</td>
<td>April 27</td>
<td>April 28 (Coaching call #3)</td>
</tr>
<tr>
<td>Action</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Celebration and Reflection</td>
<td>Course Evaluation</td>
<td>May 4</td>
<td>May 5 (Celebration call)</td>
</tr>
</tbody>
</table>