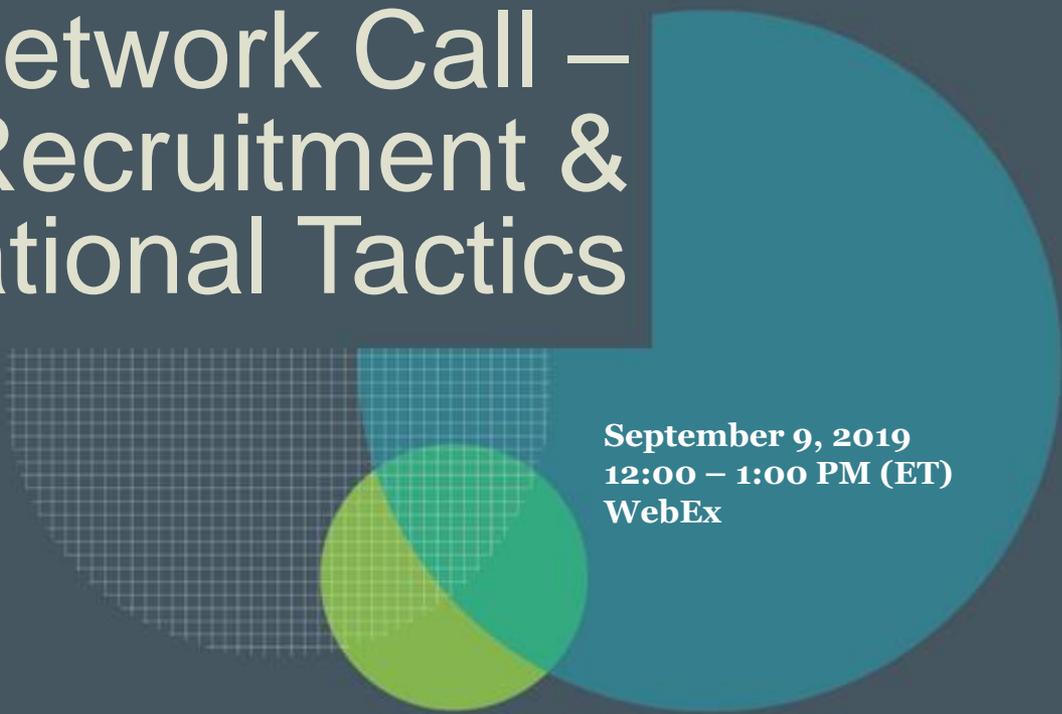


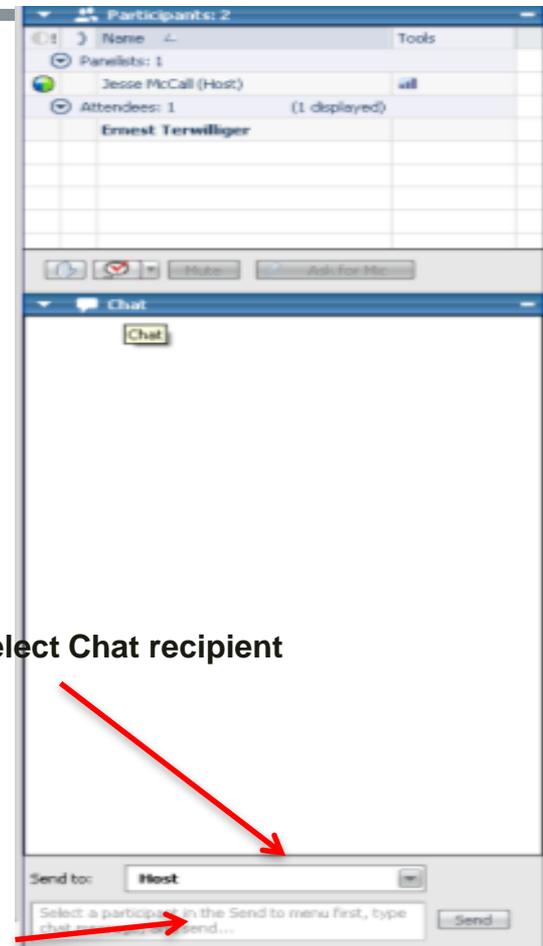
# Chapter Network Call – Recruitment & Relational Tactics



**September 9, 2019  
12:00 – 1:00 PM (ET)  
WebEx**

# WebEx Quick Reference

- 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)



Enter Text  
and hit send



# Objectives

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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

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- 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!

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- 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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Project Assistant,  
IHI Open School



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**Laura Fink**  
Director, Editorial and  
Online Learning



**Mike Briddon**  
Executive Director  
IHI Open School



# Our Mission

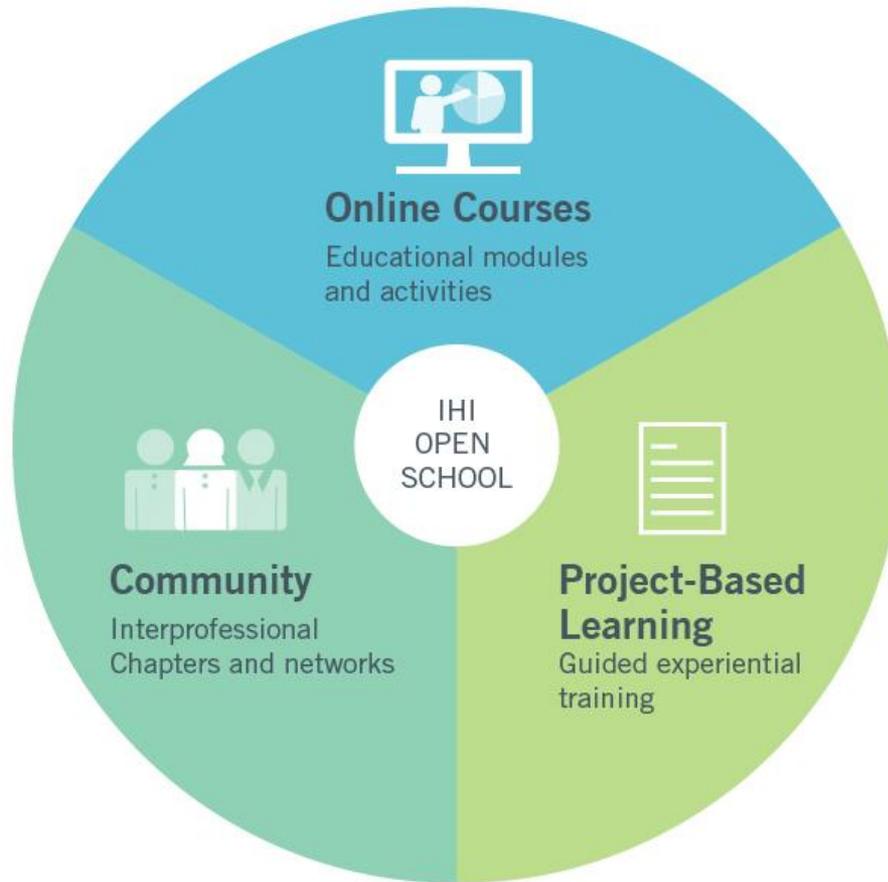
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“Advance quality improvement, patient safety, and leadership competencies of health and health care professionals worldwide.”



# Our Strategy

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# Online Courses

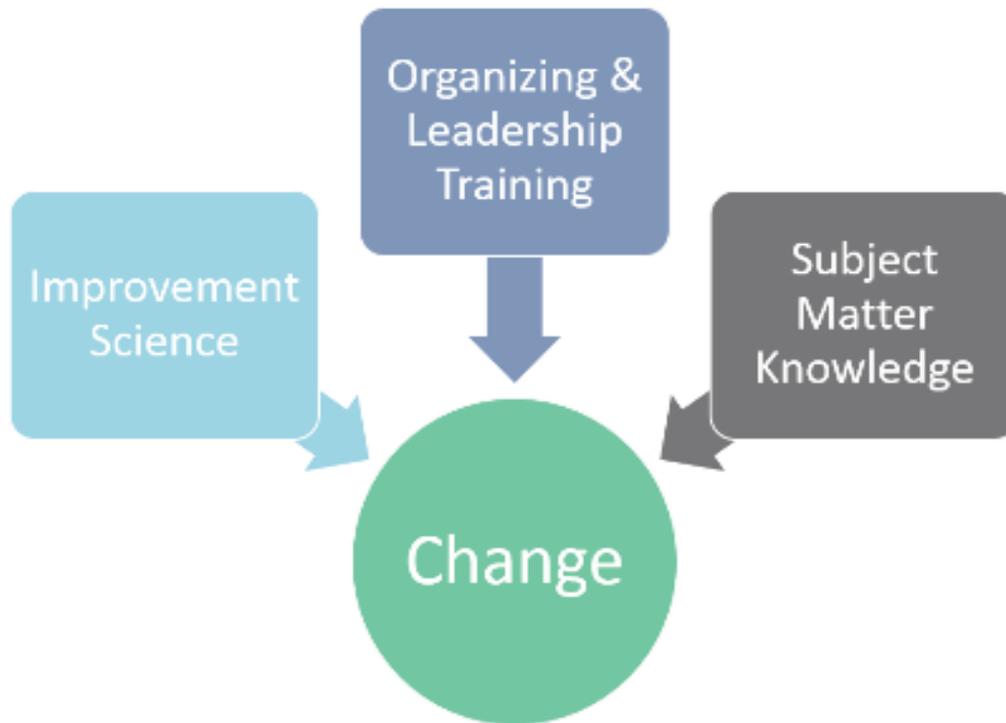
- **30+** online courses in Improvement Capability, Patient Safety, Person- and Family-Centered Care, Triple Aim for Populations, Leadership – all free to students, residents, and faculty
- **Almost 800,000** students and residents registered on IHI.org and taking courses
- **More than 4 million** course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



# Project-Based Learning

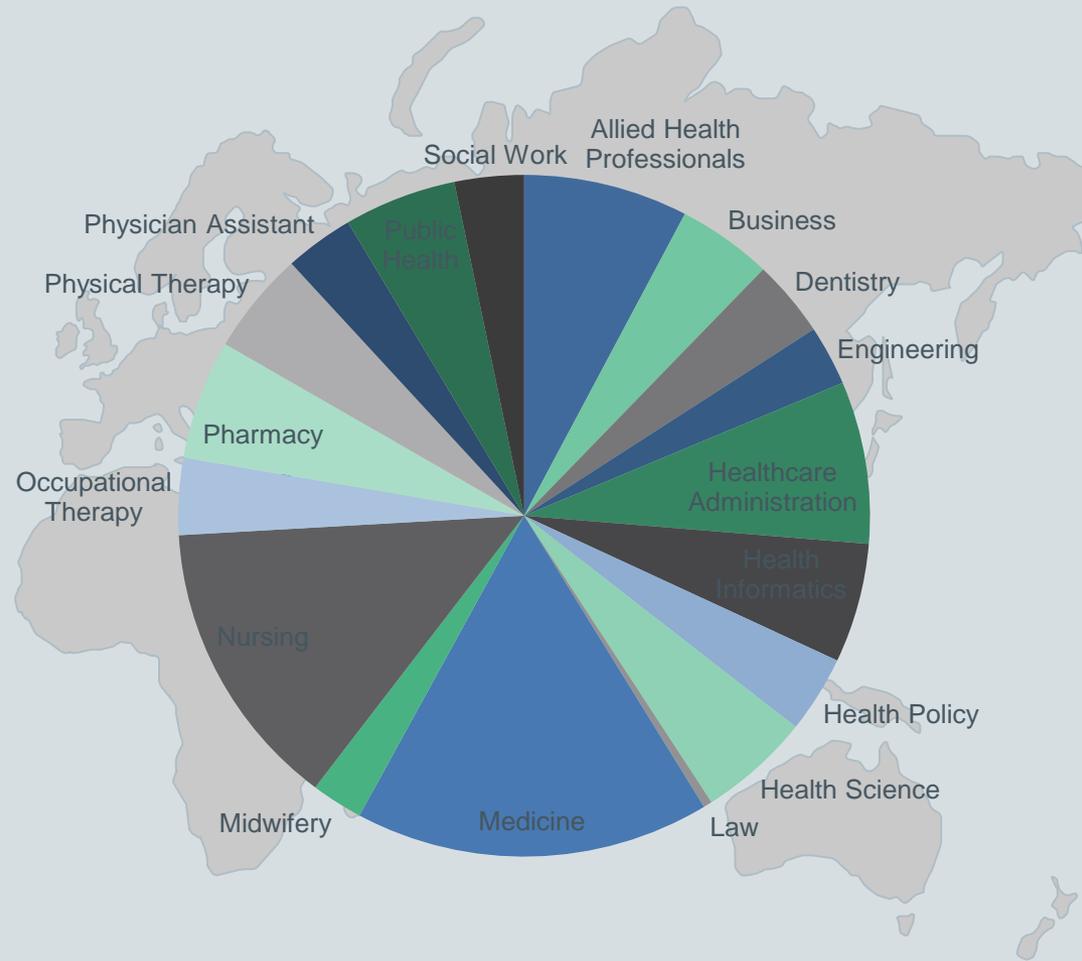
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## Leadership & Organizing for Change



# 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

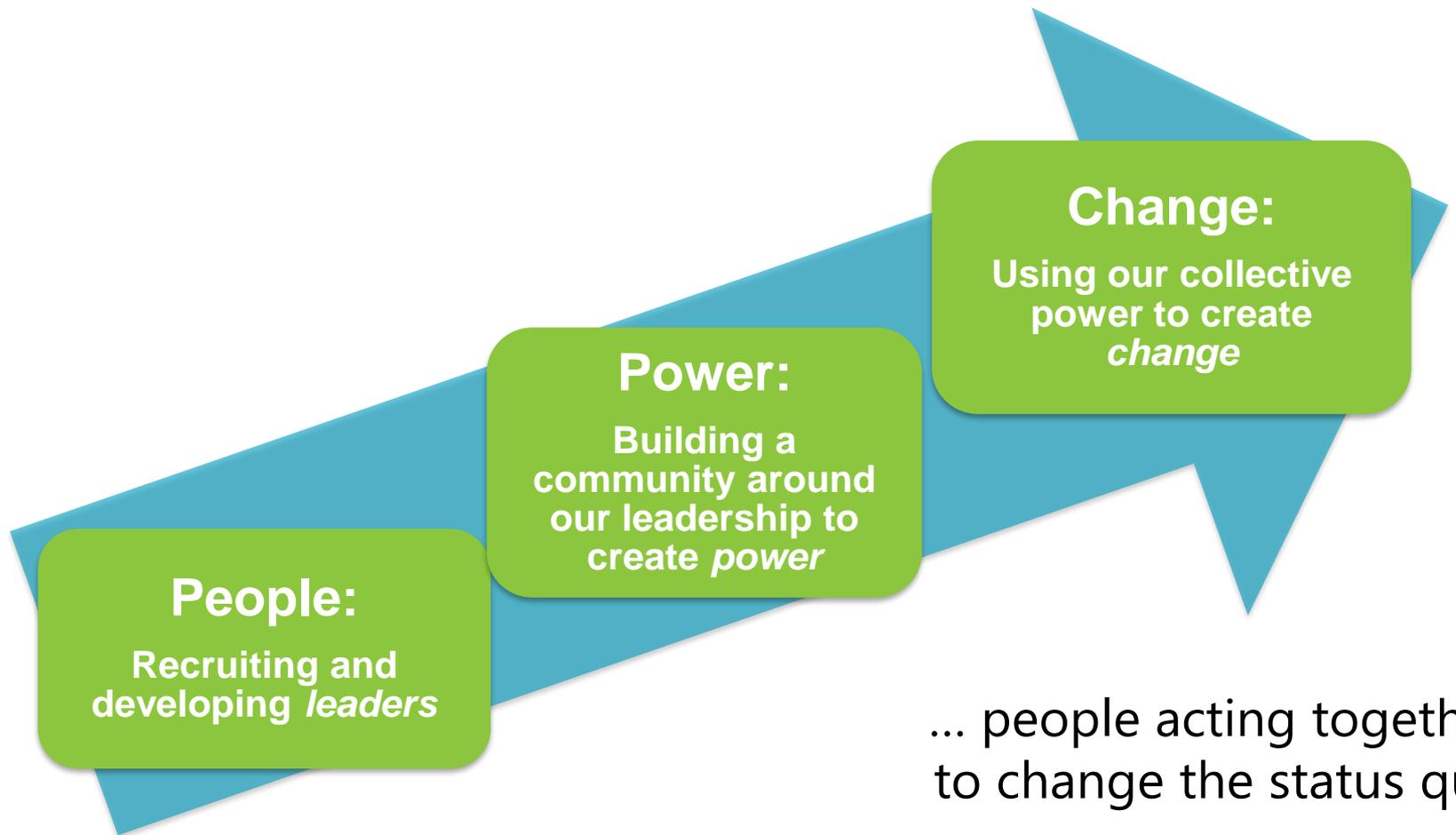
*Hannah Flath*

*Program Coordinator, IHI Open School*



# Community Organizing Theory of Change

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# Organizing & Mobilizing

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**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



# Activities on the Ladder of Engagement

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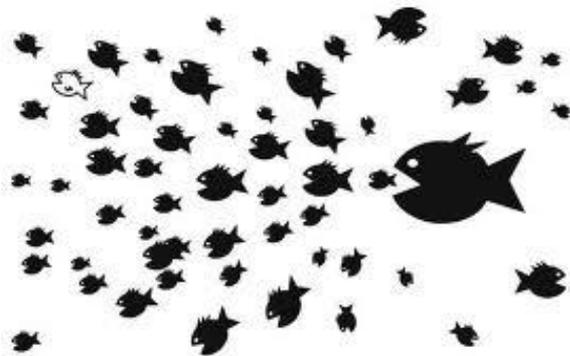
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- Join a leadership team
  - Host an event
  - Volunteer
  - Behavioral change regularly
  - Behavioral change 1x
  - Attend an event
  - Sign a pledge
  - Engage in social media



# Why Map Actors & Assets?

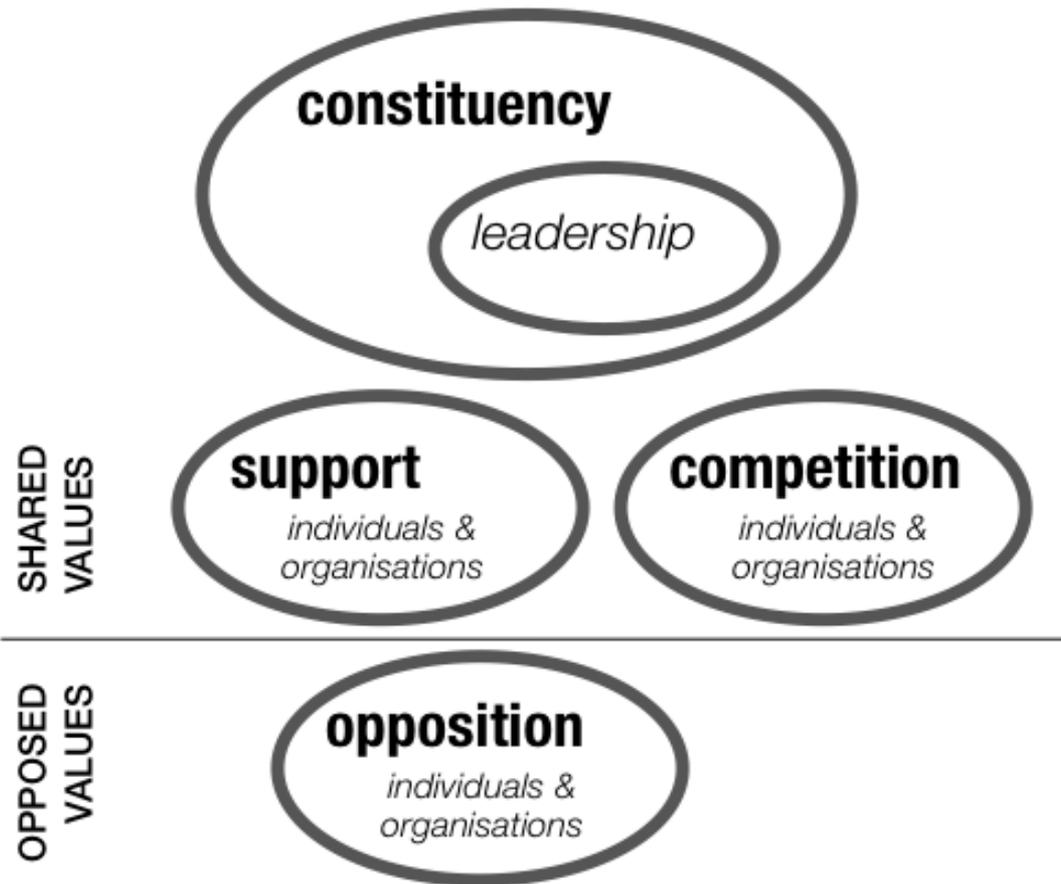
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- Recognize people as our greatest asset
- Build our strategy on existing assets
- See the “system” of stakeholders and how they connect
- Reframe relationship between traditional hierarchies
  - develop “power with” instead of doing “to” or “on behalf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



# Who Are Our People?

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# Chapter Example: Wright State University



# What were they trying to achieve?

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**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

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## 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

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## Opposition:

Organizations or people that  
rely on substance use  
dependence?



# Outcomes

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- 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

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- 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?

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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

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## **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

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- 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?

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- **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

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1. Seek commitment
2. Secure commitment
3. Sustain commitment



# 1. Seek Commitment - Making the Ask

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## 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



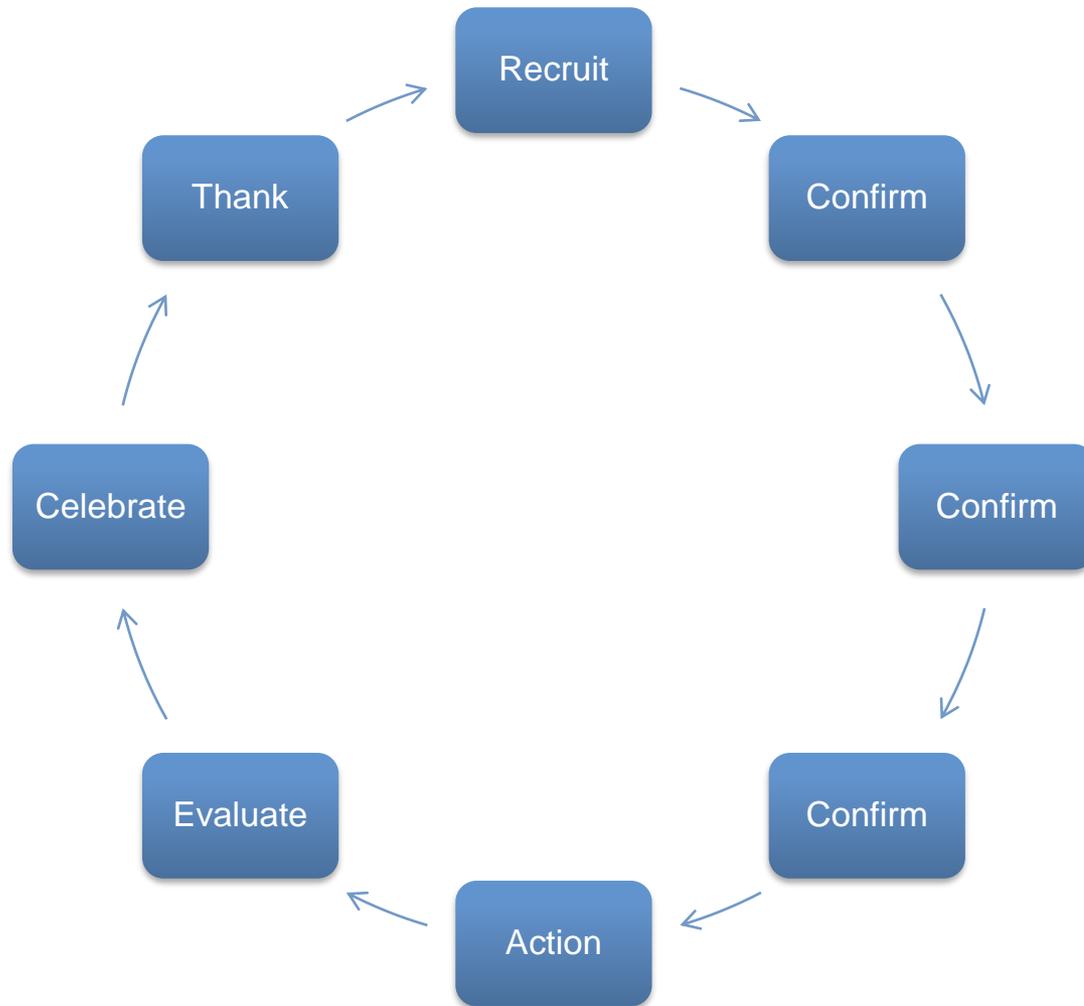
# 1. Seek Commitment – Making the Ask

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- 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

Name	Phone #	CSEA member (Y/N)	Invited (Y/N)	Committed (Y/N)	Confirmed w/Reminder Call (Y/N)	Attended (Y/N)	Notes
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							

## 2. Secure Commitment



## 2. Secure Commitment

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- 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

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- 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

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- 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

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- **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

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- 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

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- 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



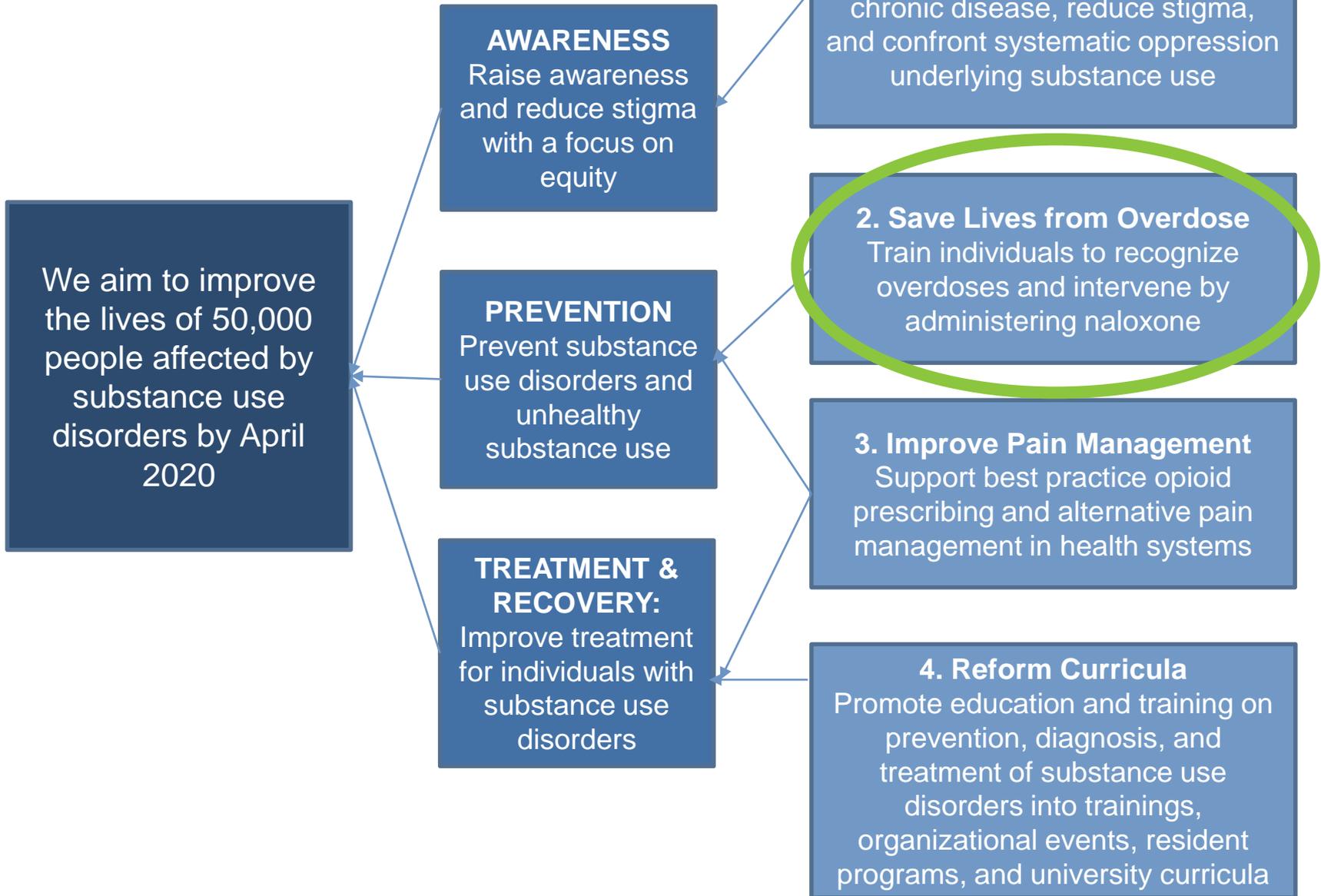
# Next Steps

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- Interested in receiving coaching from an IHI Open School Coach? Email [openschool@ihi.org](mailto: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!



# IHI Open School Recover Hope Campaign



# Recover Hope Campaign Timeline



# Recovery Month Events

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**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?

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



Thank you!

