Chapter Leader Toolkit

Updated January 2020

Institute for Healthcare Improvement

Welcome to the IHI Open School Chapter Network

Dear Chapter Leader,

Congratulations on your new role and welcome to a community of nearly 1,000 IHI Open School Chapters working to improve health and health care around the world. We are grateful for your commitment to leadership and dedication to changing the way health care students, trainees, professionals work, interact with one another, and deliver care. By offering educational resources in quality and safety, and opportunities to lead improvement locally, you are equipping your peers to become change agents in health care.

This Chapter Leader Toolkit will help you launch and grow a thriving, vibrant Open School Chapter. In these pages, you'll find advice and best practices from other Chapters. We invite you to innovate, improve, and share your own success stories as you go.

This is only one of the resources available to Chapter Leaders. We invite you to engage with us through:

- The IHI Open School website, courses, and resources
- Programming at the IHI National and International Forums
- Topic-specific Global Chapter Network calls
- The Annual IHI Open School Leadership Academy

Don't forget to share both your challenges and your progress with the IHI Open School team. We're here for you.

Sincerely,

Michael Briddon

Director, Open School, Virtual Programs, and Multimedia

Overview of the IHI Open School

The Institute for Healthcare Improvement (IHI) is a reliable source of energy, knowledge, and support for the never-ending campaign to improve health care worldwide. IHI aims to improve the lives of patients, the health of communities, and the joy of the health care workforce.

The mission of the IHI Open School is to advance quality and safety competencies in the current and future generations of health professionals worldwide. The IHI Open School offers learners from all disciplines and backgrounds the chance to build skills through online courses on quality, safety, value, equity, leadership, and more, and apply those skills by leading improvement projects in their local settings. Our network of in-person, face-to-face Chapters lead local efforts to raise awareness, educate, and inspire individuals to act in pursuit of IHI's mission of improving health and health care worldwide.

The IHI Open School offers:

- **Online courses written by world-renowned faculty**: Take our online courses in quality improvement, patient safety, leadership, patient- and family-centered care, population health, and managing health care operations. These courses are free to students, residents, and faculty.

- **The IHI Open School Basic Certificate in Quality & Safety**: Complete a set of 13 online courses – free to students, residents, and faculty – and earn a certificate that shows employers you're serious about improving care.

- **A network of students and educators like you**: Connect with students and faculty from other professions, states, and countries through our network of Chapters.

- **Case studies, exercises, videos, and featured articles**: Discover a bounty of online resources available on our website and in our mobile app.

Overview of IHI Open School Chapters

An IHI Open School Chapter is a face-to-face group of individuals who work together to learn and apply skills in quality, safety, and leadership, and share a goal of improving health and health care. Every IHI Open School Chapter is unique. Academic Chapters are led by students and residents representing a variety of health professional programs at a university; professional Chapters are hosted by health care organizations.

What do Open School Chapters do?

Here are examples of what IHI Open School Chapters do:

- Take Open School courses to learn the basics of quality and safety

- Raise awareness of quality and safety designing training programs or integrating Open School courses into university or training curriculum

- Host events for peers or colleagues interested in quality and safety on their campus, at their organization, or with other Chapters in their region

- Engage with fellow members of the Chapter Network through virtual calls, in-person events, or collective action campaigns like the Recover Hope Campaign

What are the Benefits to Belonging to an IHI Open School Chapter?

- Grow your skills in quality and safety in health care in an interprofessional setting

- Use your knowledge of patient safety and quality improvement to lead impactful projects in your community and with partner organizations

- Access the IHI Open School Coaches, a team of volunteers who are current or former Chapter Leaders and provide coaching and support to Chapters

- Participate in Global Chapter Network Calls, either by tuning into topic-specific calls to learn and connect with other Chapter Leaders, or by presenting your own Chapter's work and best practices

- Network and share ideas with like-minded students, faculty, and health care professionals across our global community

Starting an IHI Open School Chapter

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Enroll Chapter

Your first step is to complete the Chapter Enrollment Form to be recognized as an IHI Open School Chapter. Then, you'll receive:

- A welcome email confirming your enrollment as an Open School Chapter and matching you with an IHI Open School Coach to support you as you get started.

- An entry in our online Chapter Map, through which others can reach out to connect and get involved with your Chapter. We invite you to connect with other Chapters in your area through the Chapter map as well.

Some colleges and universities require student organizations to register with an office that governs student groups on campus (i.e. Office of Student Activities, administration, or Student Government).

Likewise, at a hospital or organization, finding a way to officially "register" may increase credibility as you recruit members. Although this is not required by the Open School, it is highly recommended. Registered Chapters often receive better support and recognition from their institutions, including increased funding opportunities.

Identify Chapter Leadership

Most Chapters start with a small but dedicated group of leaders. Some Chapters hand-select highly involved and enthusiastic members to lead the group, while others invite nominations from members, ask candidates to apply, and/or hold a formal election for leadership roles. Whichever approach you take, we encourage you to clearly define the leadership structure and responsibilities of each role so that your team can effectively advance your Chapter's goals and ensure sustainability from year to year.

Identify a Chapter Leader

Chapter Leaders recruit fellow students, residents, faculty, and professional colleagues to join the Chapter to learn and apply skills in quality and safety. Chapter Leaders:

- Facilitate learning and networking opportunities

- Organize projects, events, and activities that provide meaningful opportunities to build and practice skills in quality and safety

- Advocate for quality and safety to be integrated into a university or training program's curriculum

- Connect with other Chapter Leaders, locally and internationally, to share ideas and best practices

Identify a Faculty Advisor

Faculty Advisors can help academic or professional Chapters identify new members, connect events to institutional needs or priorities, and offer career or academic advice. Faculty Advisors often provide continuity within your Chapter from year to year as students and trainees graduate.

Any member of the faculty, staff, or administration at your school can serve as a Faculty Advisor. A good place to start is by approaching faculty who teach courses on topics that align with the goals of your Chapter, or who express an interest in quality, safety, and interprofessional education.

Once you've identified a potential Faculty Advisor, set up a meeting with them to discuss the mission, purpose, and goals for your Chapter, and codesign the role they will play to support the Chapter.

Leadership Structures

Chapters design their leadership structures in a variety of ways. Some leadership structures help a Chapter get off the ground; others help maintain sustainability once the Chapter is firmly established. Your leadership structure may change over time, and that's okay. Whichever model you choose, we encourage you to foster collaboration across leaders and feedback from members to continuously improve the Chapter's governance. Prioritize shared leadership, collaboration, and feedback.

Here are a few examples of leadership structures you may consider for your Chapter:

A. Board Structure

A hierarchical board structure clearly defines roles and responsibilities for each leader and concentrates decision-making authority with the Chapter Leader(s) or President(s). There are a few ways to divide roles:

a. One Chapter Leader represents each professional training program (i.e. pharmacy, nursing, medicine, public health, etc)

b. One Chapter Leader focuses on managing the internal team and one focuses on building external relationships with faculty, administrators, health care systems, or community partners

c. One Chapter President with Vice Presidents that oversee areas of the Chapter's work, as seen below:
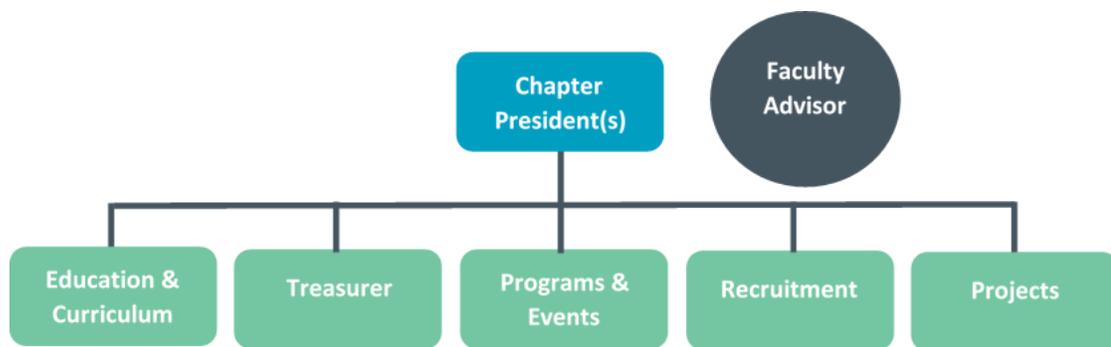
d. One Chapter Leader represents each campus participating in the Chapter, as seen below:
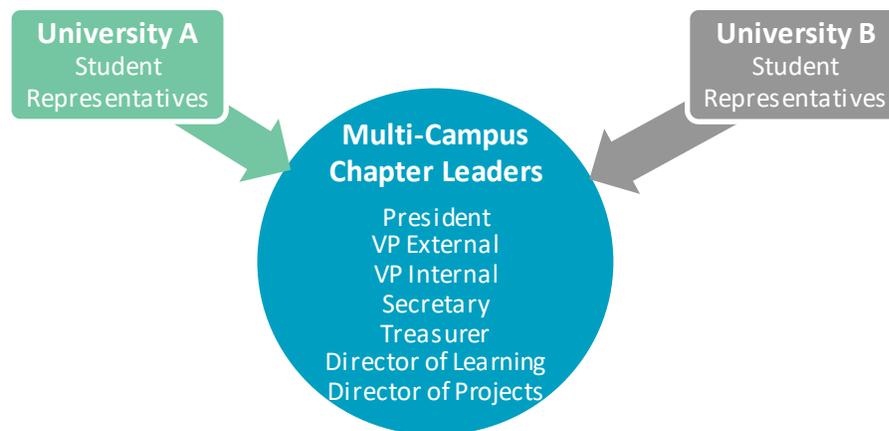
B. Distributed Leadership Model

The snowflake model distributes leadership across an interdependent team, in which each member feels a sense of mutual commitment to one another and to the shared purpose of the Chapter. This model allows leadership to cascade outward when each leader develops a team of leaders around them. Read more about how the IHI Open School Chapter at MGH Institute of Health Professions adopted a snowflake model of leadership in this storyboard from the 2018 IHI National Forum.

Craft Chapter Mission and Goals

What motivates you to lead an IHI Open School Chapter? Why should others join you? Defining your Chapter's vision, mission, values, short- and long-term aims, and strategy will help you communicate to potential members and to your broader campus, organization, or community, why the work you do matters. Whether it's quality, safety, leadership, interprofessional education and teamwork, health equity, community health, or other topics, clearly defining the Chapter's identity will help you and your team focus and measure your progress.

Remember that strong aims are specific, measurable, achievable, relevant, and time-bound – and that your aims can and should evolve over time as your Chapter grows.

Check out the sample charter in the [Chapter Resources](#) section of our website to get started.

Grow Chapter Membership

Recruiting, engaging, growing, and sustaining your Chapter membership is critical to success. For many members, involvement in an Open School Chapter is their first introduction to quality improvement and patient safety.

Develop a Chapter Pitch

Develop a standard pitch to quickly and effectively convey the important work your Chapter leads – and be prepared to personalize your message depending on your audience. Here's a starting point:

- **Overview**: Introduce yourself and the information you'll cover
- **Introduction**: Introduce IHI and the Open School, then share an overview of your Chapter, your mission, and any other defining information
- **Legitimize your group**: Describe your Chapter's recent successes and accomplishments
- **Problem definition**: Describe the problems your Chapter is working to solve
- **Solution and involvement**: Share your Chapters' efforts to tackle the problems you identified, and how the person you're recruiting can get involved
- **Personal appeal**: Share why you got involved with the Chapter, why you care about quality and safety, and what changes you want to see in health care and/or in your local community
- **Thanks**: Thank your audience for their time and attention and let them know how get in touch

Check out the ["Made to Stick" materials](#) on the Open School website to strengthen your pitch.

Creating a Recruitment Plan

Creating a plan to recruit members will help you and your team identify effective tactics, divide responsibilities, and stay organized. Consider the following:

Timing of campus events such as activity fairs or orientations.

Resources such as flyers, bookmarks, and other promotional material to distribute on campus or present during meetings and events.

Ownership of action items. Identify who will print materials, set up a table, and capture individuals' information to follow up.

The IHI Open School can provide you with recruitment materials to pass out on campus or at events. Submit your request here to place your order.

Recruitment Strategies

Consider time and resource-intensive relational strategies as well as mass marketing to raise awareness of your Chapter and recruit new members:

- Invite a friend, classmate, or colleague to a meeting and follow up with them with reminders
- Set new member goals and encourage Chapter members to bring a new friend or colleague to a meeting or event, recognizing and rewarding whoever brings the most people
- Host a networking event or an event that will appeal to a large audience, such as a film screening
- Have Chapter Leaders connect with faculty and organize brief classroom visits where they can speak to the benefits of joining the Chapter, share materials, and encourage individuals to get involved by attending the next meeting or event
- Ask faculty to share information about the Chapter in class, by sending an email to students or colleagues about upcoming events, offering extra credit for participation in Chapter activities
- Attend a career or activity fair, or new employee or annual trainings for staff
- Post recruitment flyers and meeting announcements on bulletin boards or other high-traffic areas

Publicity and Recognition

Publicity can help grow your Chapter. When holding large events, add a notice to newsletters or online calendars, engage your organization's community relations department, get in touch with relevant departments across the university or health system, and share news releases with local newspapers or online outlets to announce the event or share highlights after the fact.

Welcome and Engage New Members

Once you've recruited new members, the next step is to welcome and engage them in your Chapter activities. Keep a sign-in sheet at all events and send a personal welcome note to each new member. Survey members periodically to understand their needs and interests. Use the survey results to develop Chapter goals, activities, and events. You can find examples of sign-in sheets, Chapter interest surveys, and other tools to engage your members on the Chapter Resources section of our website.

Chapters that communicate regularly have higher member retention and participation at meetings and events. Although websites and social network platforms are a good way to communicate announcements and news, you should not rely on these as your sole method of communication. Many Chapters create newsletters to inform new and existing students and/or residents of upcoming events, recommended courses, relevant articles, opportunities from IHI, and other educational opportunities.

Ensure Chapter Sustainability

Encourage Ongoing Member Involvement

- **Highlight the Value of Their Involvement:** Remind Chapter members that earning the IHI Open School Basic Certificate in Quality and Safety, participating in a Chapter, and building skills in quality and safety can signal to current and future employers a commitment to health care improvement. Engaging with the IHI Open School helps current and future health care professionals prepare for and advance their careers, with the support of a collaborative learning community.

- **Solicit Feedback:** Regularly survey Chapter members to understand their interests, improve the Chapter's activities, and ensure that the Chapter is responsive to its constituents, which may include Chapter members, community partners, and other affiliates
- **Leadership Opportunities:** Offering meaningful leadership can motivate members to stay engaged with the Chapter. Even if a member cannot commit to a year-long leadership role, you can invite them to support a specific event or short-term project. Chapter meetings are good opportunities to invite members to volunteer to take on upcoming tasks and get involved on a smaller-scale.

Succession Planning

Especially for Chapters based in universities and training programs, where students and trainees graduate and move on from their leadership roles every year, succession planning is critical. Transitioning to a new leadership team *before* the end of the school year or semester allows time for onboarding, training, mentorship, and coaching of Chapter Leaders new to their roles. Here are a few tips:

- **Determine a selection process:** With your fellow Chapter Leaders and members, decide on the process for selecting a new leadership team: Will Chapter members apply for positions or be nominated? Will the future Chapter Leaders by chosen by the current leadership team or by all members? Will candidates be selected by majority or by consensus? A clear and transparent process will lead to a smooth transition.

- **Recruit promising leaders:** Invite actively engaged Chapter members to consider leadership roles, whether through an application, nomination, or less formal process.

- **Document and share important information with incoming Chapter Leaders**: Remember to record best practices, contact information, and other resources throughout your tenure as a Chapter Leader that may be useful to successors. We recommend filing this information in a binder or folder or online via Google Drive or Dropbox to easily hand it off to the incoming leadership team.

- **Update the Open School team**: Help us keep our email lists up to date by reaching out to openschool@ihi.org with the new contact information for your Chapter Leaders, as well as members who are no longer active.

Finances and Fundraising

Chapter Finances

No fees or annual member dues are required to enroll, maintain, or join an Open School Chapter. It is up to each Chapter to acquire any funds necessary to carry out programs and events. Here are a few suggestions and tips for fundraising:

- **Institutional Support:** Apply for funding or directly ask for financial support from a university administration (i.e., a student life office) or organizational leadership. Make a strong case for the benefits of their investment in the Chapter. For Chapters based at universities or training programs, securing a Faculty Advisor and getting your Chapter officially recognized can help increase your eligibility for funding, meeting space, and connections to health system partners.

- **Fundraising:** Fundraising is an excellent way to support Chapter activities and events. Be sure to review university policies and state laws prior to soliciting donations or hosting fundraising events.

- **Grants and Scholarships:** Grants and scholarships may be available through your university or organization, or from local and national organizations and associations. Ask for help identifying grant opportunities from an office of student activities or the relevant department at your organization.

- **Chapters have found success raising funds in a variety of other ways, including:**
  - Charge Chapter dues per semester or year
  - Charge small entrance fees at events to cover the cost of food, drinks, or a speaker
  - Organize a sale of merchandise like t-shirts, water bottles, or refreshments to raise awareness and funds for your Chapter
  - Host an auction or raffle with prizes donated from local organizations
  - Solicit donations whenever possible

Managing Chapter Funds

Creating a budget for your Chapter will help determine your Chapter's financial needs each year. Consider selecting a Chapter Leader to act as a treasurer or financial officer dedicated to managing the Chapter budget, setting priorities for spending, recording income and expenses, and identifying fundraising opportunities.

For student Chapters: Campus agency accounts or off-campus bank accounts may be useful in maintaining accurate records of income and expenses and is required at some sites to transfer grant funds. Chapters based in the United States that do not have university local bank accounts and are interested in administering their funds should apply for an Employee Identification Number (EIN). The EIN is the organizational equivalent of the individual Social Security Number (SSN) or Taxpayer Identification Number (TIN). The IRS provides general information to student groups regarding EINs, which are required for establishing a bank account.

Tax Exemption and Reporting in the United States

All Chapters are expected to comply with the regulations of their organization and must also comply with applicable federal and state tax laws. IHI's tax exempt status does not extend to its Chapter organizations. Filing federal and state returns for an organization and complying with related federal and state tax laws is the responsibility of each Chapter or region.

Chapters should investigate whether they can register with their Secretary of State as a non-profit, with the federal government as a 501(c)(3) group, or as a charitable organization.

To receive tax-deductible donations, some Chapters are asked for their "tax I.D. number" when establishing bank accounts, receiving funds from businesses, or accepting donations. Tax donations to student organizations are not tax deductible for donors, unless they are made to the university through your agency account. For more information, contact your Office of Student Affairs or Finance department.

Fundraising in the United Kingdom

The Institute of Fundraising has developed Codes of Fundraising Practice and Code of Conduct to provide a guide to the law and best practice in relation to fundraising activity throughout the United Kingdom. The Bar Pro Bono Unit is a good resource for the rules and regulations about raising money for non-profit activities.

Community Network

Connect to the Community

The Open School community is a diverse group of students, residents, faculty members, and professionals. Connecting with other Open School Chapters is a great way to network and engage with other health care professionals – either face-to-face at events and trainings, or virtually.

Open School Coaches **(OSC's):** OSC's are ambassadors of IHI and the Open School and provide support to our ever-growing Chapter Network. This group of dedicated current or former Chapter Leaders have demonstrated agility in quality improvement, community organizing, and leadership competencies, and are committed to providing high-quality coaching to Open School Chapters. These coaches build capacity and opportunities for connectivity and collective action across the entire Chapter Network. To request a call with an Open School coach, email openschool@ihi.org today.

Global Chapter Network Calls: Throughout the year, the IHI Open School and Open School Coaches host a series of calls to provide an opportunity for members to connect and share best practices, opportunities, and common challenges they've faced in their work. These calls are topic-based and offer a deep dive into topics like recruitment, curriculum integration, project-based learning, and more.

Events and Conferences: IHI hosts several conferences throughout the year and around the world. These conferences offer student, resident, and faculty scholarships and opportunities to present storyboards. The Open School hosts networking opportunities and other sessions at these events to build community across our network.

Support from the IHI Open School Team

A small team of full-time staff leads the IHI Open School from IHI's headquarters in Boston, MA, USA. The team creates and updates high-quality, accessible online content and supports our growing community to achieve our mission of advancing health and health care worldwide. E-mail openschool@ihi.org to get in touch with the IHI Open School team.