IHI Open School Course

Leadership and Organizing for Change

Course Dates:
Orientation: March 14 – March 20, 2019
Course Lessons: March 21 – May 15, 2019
Evaluation & Celebration: May 16 – May 23, 2019

Course Website:
Each week, learners visit the course website to access online lectures and download and submit assignments. Please note that you must be logged in to your IHI.org account to access the course website, and only current participants in the course are granted access to the course website.

Course Description:
This course equips learners with skills in leadership and community organizing and empowers them to lead change efforts in their local settings.

Through an innovative combination of learning methods – online lectures, All-Learner Calls with experts in the field, and support from peers – learners develop skills and knowledge in leadership, community organizing, population health, and the science of improvement to strengthen their ability to chart a path for change and engage key stakeholders.

Learners will identify a specific project for their organization or community and directly practice the skills they learn each week to achieve their aim.

Course Pedagogy:
The course employs several pedagogical techniques in a combination of self-driven and social learning to create a robust learning environment:

- *Experiential learning:* Learners will lead a project at their organization or in their community that will enable them to directly apply the skills they learn from the program.
- *Asynchronous lectures:* Learners will view on-demand online video lectures (which include transcripts for easy reference).
- *Synchronous All-Learner Calls:* Learners will engage in several live, group 60-minute All-Learner Calls with course faculty and peers.
- *Self-study:* Learners will complete assignments, explore readings, apply tools, and reference other resources to reinforce their learning.

Curriculum:
This course brings together IHI's expertise in improvement science, proven organizing and leadership practices, and subject matter knowledge from experts in the field.
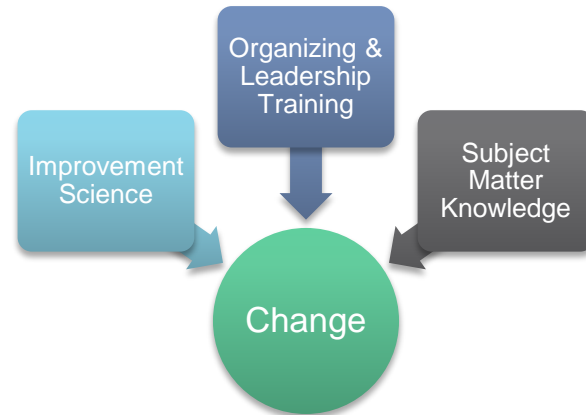
By the end of the course, learners will:

- Develop a compelling story of their own leadership journey to call others to action
- Approach relationships openly and intentionally to gain commitment based on shared values
- Map stakeholders and assets within their organization or community to leverage towards change
- Create the conditions for interprofessional and multi-stakeholder teams to work together effectively
- Distribute leadership to co-produce sustainable efforts
- Reach out to local communities and build new partnerships
- Design motivating actions to engage others meaningfully in the work
- Mobilize people towards collective, large-scale systemic change

Course Fees:
The regular rate to access the course is $549. A limited number of academic scholarships for students, residents, and professors are available to cover the cost of the course. Additional special discounts are also available. Applications for all scholarships and discounts are available here and are due by March 8, 2019.

Continuing Education Credits:
Yes. The Institute for Healthcare Improvement is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME) and the American Nurses Credentialing Center (ANCC) to provide continuing education for health care team members. IHI has been approved for a maximum of 10 credits for physicians and nurses.

To be eligible for a continuing education certificate, attendees must complete the online evaluation within 30 days of the continuing education activity. After this period, learners will be unable to receive a certificate.

Requirements for Receipt of Certification of Completion:
Participation in the course involves a time commitment of 3-5 hours per week, including didactic education (online lectures, assignments, readings), attendance at All-Learner Calls, and field work applying the new knowledge and skills to a project. Time commitments will vary slightly each week. The faculty has distilled the lectures and readings down to the essentials.

At the end of this course, learners will receive a Certification of Completion. In order to receive this certificate, learners must:
- Watch all weekly videos
- Complete and submit all weekly assignments
- Attend (or view recordings of) all live All-Learner Calls
- Complete the post-course evaluation

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.

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.

Kate Hilton, JD, MTS
Kate is a founding director and senior consultant at ReThink Health, where she teaches organizing and leadership skills to quality improvers in a five-year project with the Centers for Medicare & Medicaid Services. Ms. Hilton is lead faculty of the Institute for Healthcare Improvement's (IHI's) online program Leadership & Organizing for Change and a faculty advisor to the IHI Open School. She also serves as engagement advisor to the 100 Million Healthier Lives implementation team and as faculty in SCALE and the Age-Friendly Health Systems effort. In addition, Ms. Hilton is faculty in the Leaders for Health Equity Fellowship at George Washington University, and in the Rockefeller Leadership Fellows and Management and Leadership Development Programs of Dartmouth College. Ms. Hilton is a Principal in Practice for the Leading Change Network at Harvard University, where she works with Marshall Ganz to design curricula, lead trainings, teach courses, write articles, and coach teams in leadership and organizing. She has coached and led trainings to improve health care quality and lower costs in the U.S. and abroad.

Email: kate.b.hilton@gmail.com

Rishi Manchanda, MD, MPH

Rishi Manchanda is President & CEO of HealthBegins, a mission-driven consulting and technology firm that helps healthcare and community partners improve care and the social factors that make people sick in the first place. Client-partners include the American Hospital Association, the CMS Accountable Health Communities model, and health plans and health systems across the country. Dr. Manchanda serves on the board of the Beyond Flexner Alliance, on the California Future Health Workforce Commission, and was a member of the HHS Health Care Payment Learning & Action Network's Primary Care Payment Model Work Group.

Dr. Manchanda's career is marked by a commitment to improving care and social determinants of health for vulnerable populations. He served as director of social medicine for a network of community health centers in south central Los Angeles, was the lead physician for homeless Veterans at the Greater Los Angeles VA, and was the first chief medical officer for a self-insured employer with a large rural immigrant workforce. In his 2013 TEDbook, The Upstream Doctors, he introduced a new model of healthcare workers - the Upstreamists - who improve care and equity by addressing patients' social needs, like food, financial and housing insecurity. The book has become recommended reading in medical schools and universities across the world.

Jessica Perlo, MPH

Jessica directs the Institute for Healthcare Improvement's (IHI) Open School, a global, virtual, interprofessional community that provides individuals and teams with skills they need to transform health and health care. She also leads IHI's Joy in Work Portfolio, which aims to reverse the worrying trend of burnout in health care and support leaders at all levels in creating a positive work environment that fosters equity, camaraderie, meaning, choice, and a shared commitment to deliver high-quality care. Jessica teaches and coaches around the globe, building individual and organizational capability for improvement and joy, and has authored several publications on these topics.

For more than 10 years, Jessica has worked to design and implement health system improvement efforts, including roles at Finger Lakes Health Systems Agency, Brigham & Women's Hospital, and Partners Healthcare. She is a member of the National Academy of Medicine Action Collaborative on Clinician Wellbeing and Resilience, trained in community organizing from the Harvard Kennedy School of Government, and is an IHI-certified Improvement Advisor.

Lessons

Orientation: March 14 – March 20
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 experience.

Learners must also complete an online IHI Open School course as a pre-requisite for the program. These courses are asynchronous, featuring three to five modules and taking only one to two hours to complete. Learners can select between three topics, based on which will best support the focus of their project work in the course: introduction to quality improvement science; introduction to population health and the Triple Aim; or introduction to the IHI Open School Chapter Network.

Objectives:
At the end of the orientation, learners will be able to:
- Explain the course components, goals, and curriculum flow
- Understand how to get the most out of the course
- Summarize the difference between organizing and mobilizing

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

Assignment:
- Create or update your profile on www.ihi.org (Click "My IHI" in the top navigation bar)
- Watch the course orientation videos
- Complete one of three pre-requisite courses from the IHI Open School Course Catalog:
    o QI 102: How to Improve with the Model for Improvement
    o TA 101: Introduction to the Triple Aim for Populations
    o OS 101: Introduction to the IHI Open School: Join the Movement to Improve Health & Health Care
- *Optional*: Introduce yourself in the course Facebook group

Optional additional resources:
Swensen S, Pugh M, McMullan C, Kabcenell A. High-Impact Leadership: Improve Care, Improve the Health of Populations, and Reduce Costs. Institute for Healthcare Improvement. 2013. (Available at: http://www.ihi.org/resources/Pages/IHIWhitePapers/HighImpactLeadership.aspx)

Lesson 1: Introduction to Systems Thinking: March 21 – March 27

Description:
How do we shift our focus from treating symptoms to tackling causes of system failure? How can the health care workforce begin to systematically understand and address the social determinants of health? In this lesson, we learn about systems thinking and "upstreamist" 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 U.S. health care system
- Recognize the skills that are critical to becoming a systems thinker
- Apply the basics of systems thinking in your project
- Summarize the Triple Aim and how it can improve health and health care
- Compare the "upstreamist" model to traditional models of health care

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

Assignment:
- Watch the Lesson 1 video lectures
- Complete the "five whys" worksheet by **Wednesday, March 27 at 11:59 PM ET**
- Begin thinking about the stakeholders you'd like to engage in your project, and identify two or three individuals to contact to schedule a one-to-one meetings.
  - Lesson 5 covers relational strategies and one-to-one conversations. During that week (April 18 – April 24) we will ask you to submit a worksheet reflecting on your one-to-one conversations, so it is important to begin the process of reaching out in advance.
- Join the Lesson 1 All-Learner Call on **Thursday, March 28 from 1 to 2 PM ET**

Lesson 2: Organizing as a Leadership Practice: March 28 – April 3

Description:
This lesson takes us into organizing as a theory of change. We learn about interdependent leadership and develop an aim and "organizing sentence" to advance our project in the course.

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 a project
- Explain the basics of resourceful and adaptive strategizing
- Write an organizing sentence and set a measurable aim for their project

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch the Lesson 2 video lectures
- Submit your project design worksheet by **Wednesday, April 3 at 11:59 PM ET**
- *Optional:* Share your organizing sentence in the Facebook group.

Lesson 3: Public Narrative: How to Craft a Call to Action: April 4 – April 10

Description:
Why me? Why us? Why now? In this lesson, we explore why public narrative is an essential leadership skill. We learn to craft a motivating vision and invite others to join us through calls to action. We develop our public narratives and learn to coach others to strengthen theirs.

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
- Coach others to use narrative effectively

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch the Lesson 3 video lectures
- Submit a two-page story of self, us, and now by **Wednesday, April 10 at 11:59 PM ET**
- Begin sharing your narrative with others to engage them in your project
- Join the Lesson 3 All-Learner Call on **Thursday, April 11 from 1 to 2 PM ET**

Lesson 4: Stakeholder and Asset Mapping: April 11 – April 17

Description:
Who are our people? What assets can they contribute toward the achievement of our aim? In this lesson we explore the importance of an asset-based approach to change. We practice stakeholder and asset mapping and discuss how those with the lived experiences of a problem can work together to solve it – and keep it solved.

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
- Construct a map of stakeholders and assets, including values, interests, and power

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

Assignment:
- Watch the Lesson 4 video lectures
- Submit a stakeholder and asset map by **Wednesday, April 17 at 11:59 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 (ABCD). School of Education and Social Policy Northwestern University. 2005

Lesson 5: Relational Strategizing: April 18 – April 24

Description:
Relationships are the foundation of the work we do – so we pay careful attention to how we build them. Organizers build relationships among members of a constituency to create commitment to act toward a common purpose. This lesson covers 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 relationships through one-on-one meetings
- Identify the characteristics of leaders to recruit

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch the Lesson 5 video lectures
- Complete the worksheet to reflect on the 2-3 one-to-one meetings you have held with stakeholders engaged in your project by **Wednesday**, **April 24 at 11:59 PM ET**
- Join the Lesson 5 All-Learner Call on **Thursday**, **April 25 from 1 to 2 PM ET**

Additional Resources:
- Hilton, K, Wageman, R. Leadership in Volunteer Multistakeholder Groups Tackling Complex Problems." Ed. Braun, Peus & Schyns, Emerald Monographs in Leadership & Management Series, *Leadership from Compelling Contexts*, vol. 8, 431-469.

Lesson 6: Creating the Conditions for Effective Leadership Teams: April 25 – May 1

Description:
We have all been a part of teams that work well ("dream teams") and teams that function poorly ("scream teams"). The good news is that research tells us what it takes to develop a dream team: we just have to learn how to put the conditions into place for successful collaboration. In this lesson, we discuss the importance of team structure and why a shared purpose, shared roles, and shared norms are critical to success. Together, we'll learn how to establish these conditions to build effective teams.

Objectives:
At the end of this lesson, learners will be able to:
- Explain why structure matters within a team
- Discuss the importance of having a real team with the right people, a shared purpose, and enabling structures like norms and roles
- Establish these conditions to equip our teams to function effectively

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch the Lesson 6 video lectures
- Complete the team diagnostic checklist to assess your team's performance by **Wednesday, May 1 at 11:59 PM ET**
- *Optional:* Use the Team (Re)Launch Agenda resource to plan an upcoming meeting with your project leadership team

Lesson 7: Distributing Leadership to Co-Produce Sustainable Efforts: May 2 – May 8

Description:
How do we go from working in silos to a model of distributed leadership? In this lesson, we learn and practice action skills like collective decision-making, effective delegation, holding others accountable, and facilitating interdependent meetings. With intentionality, we "model the model" of distributed leadership in all that we do.

Objectives:
At the end of this lesson, learners will be able to:
- Create a snowflake diagram to illustrate a distributed leadership model
- Implement a process for collective decision-making
- Delegate effectively to distribute leadership
- Hold others accountable to commitments
- Facilitate interdependent meetings to distribute leadership
- Develop a culture of coaching and improvement

Faculty:
Kate Hilton, JD, MTS

Assignment:
- Watch the Lesson 7 video lectures
- Submit the following assignment by **Wednesday, May 8 at 11:59 PM ET:**
    - A diagram of your leadership structure as it is currently
    - A diagram of what your ideal interdependent (snowflake) structure could be;
    - A reflection on what it will take to get there
- *Optional*: Use the resources in the appendix of the Lesson 7 worksheet to practice delegation, accountability skills, and collective decision-making

Additional Resources:
Coaching Guide with tools from the Center for Courage & Renewal: Five Habits of the Heart, Touchstones and Open & Honest Questions

Lesson 8: Mobilizing Measurable Collective Action: May 9 – May 15

Description:
In this lesson, we discuss what we mean by collective action. We learn how to design tactics that motivate others to take action and increase our capacity, and we 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 the Lesson 8 video lectures
- Ask five new people to commit to take action with you in service of your project aim
- Submit your project storyboard by **Wednesday, May 15 at 11:59 PM ET**
- Join the Lesson 8 All-Learner Call on **Thursday, May 16 from 1 to 2 PM ET**
- *Optional*: Share your revised organizing sentence in the Facebook group by **Wednesday, May 15 at 11:59 PM ET**

Snapshot – Course Schedule

Lesson	Assignment	Release Date	Due Date	All-Learner Call
Pre-program Orientation	One of three IHI Open School courses as a course pre-requisite; orientation modules; introduction in course Facebook group	March 14	March 20	
1: Introduction to Systems Thinking	Five whys worksheet	March 21	March 27	March 28 *Lesson 1 All-Learner Call*
2: Organizing as a Leadership Practice	Project design worksheet; post organizing sentence to the course Facebook group	March 28	April 3	
3: Public Narrative: How to Craft a Call to Action	Public narrative	April 4	April 10	April 11 *Lesson 3 All-Learner Call*
4: Stakeholder & Asset Mapping	Stakeholder & asset map	April 11	April 17	
5: Relational Strategizing	Reflections on one-to-one meetings with key stakeholders; peer reviews of three classmates' public narratives	April 18	April 24	April 25 *Lesson 5 All-Learner Call*
6: Creating the Conditions for Effective Leadership Teams	Team diagnostic checklist	April 25	May 1	
7: Distributing Leadership to Co-Produce Sustainable Efforts	Distributed leadership structure diagrams and reflections; agenda for next leadership team meeting	May 2	May 8	

8: Mobilizing Measurable Collective Action	Project storyboard; post your revised organizing sentence	May 9	May 15	May 16 *Lesson 8 All-Learner Call*
Evaluation and Celebration	Course evaluation	May 16	May 22	May 23 *Celebration Call*