

# IHI Online Course with Coaching

## Leadership and Organizing for Change

**Course Dates:**

Course Lessons: September 24 to January 7, 2021

All-Learner Call 1: October 8, 2020

All-Learner Call 2: October 22, 2020

All-Learner Call 3: November 19, 2020

All-Learner Call 4: December 17, 2020

**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. Only current participants in the course are granted access to the course website.

**Course Description:**

This course equips learners with leadership and community organizing skills 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 strengthen their ability to engage key stakeholders and chart a path towards change.

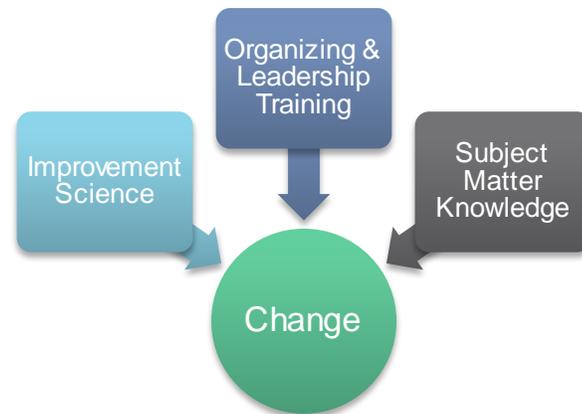
**Course Pedagogy:**

The course combines self-driven and social learning to create a robust learning environment through the following elements:

- *Project-based learning:* Learners will design and launch a project that will allow them to practice the skills they learn each week in the course program.
- *Self-paced online lectures:* Learners will view on-demand online video lectures (which include transcripts for easy reference).
- *Live All-Learner Calls:* Learners will engage in several live 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 improvement science expertise and proven organizing and leadership practices to help learners leverage their subject matter knowledge to lead change.



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 and residents 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 February 27, 2020.

**Continuing Education Credits:**

IHI is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing education for health care team members. This program has been approved for a maximum of 9 credits for physicians, CPPS recertification, pharmacists and healthcare executives. 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:**

Learners may also receive a Certificate of Completion by completing the following requirements:

- 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

The course team will share instructions to claim your Continuing Education credits and/or Certificate of Completion at the end of the course.

### Course Faculty:

#### **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.

#### **Jessica Perlo, MPH**

Jessica 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

### **Lesson 1: Orientation to the Course: September 24 – September 30**

#### **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.

#### **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:**

Jessica Perlo, MPH

#### **Assignment:**

- Create or update your profile on [www.ihl.org](http://www.ihl.org) (Click "My IHI" in the top navigation bar)
- Watch the three course orientation videos
- *Optional:* Introduce yourself in the course Facebook group

### **Lesson 2: Organizing as a Leadership Practice: October 1 – October 7**

#### **Description:**

This lesson takes us into organizing as a theory of change. We learn about interdependent leadership and develop "organizing sentence," a people-powered aim statement, 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, October 7 at 11:59 PM ET**
- *Optional:* Share your organizing sentence in the Facebook group

#### **All-Learner Call #1:**

- Join All-Learner Call #1 on **Thursday, October 8 from 12 to 1 PM ET**

**Lesson 3: Public Narrative: How to Craft a Call to Action: October 15 – October 21****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, October 21 at 11:59 PM ET**
- Begin sharing your narrative with others to engage them in your project

**All-Learner Call #2:**

- Join All-Learner Call #2 on **Thursday, October 22 from 12 to 1 PM ET**

**Lesson 4: Stakeholder and Asset Mapping: October 29 – November 4****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, November 4 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: November 12- November 18**

#### **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, November 18 at 11:59 PMET**

#### **All-Learner Call #3:**

- Join All-Learner Call #3 on **Thursday, November 19 from 12 to 1 PMET**

#### **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: November 25 – December 2**

#### **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, December 2 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: December 10–December 16****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, December 16 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

**All-Learner Call #4:**

- Join the All-Learner Call #4 on **Thursday, December 17 from 12 to 1 PM ET**

**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: December 23 – December 30****Description:**

In this lesson, we discuss how to move towards collective action. We learn how to design tactics that motivate others to get involved in our shared work and build our capacity, and practice asking 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, December 30 at 11:59 PM ET**
- *Optional:* Share your revised organizing sentence in the Facebook group by **Wednesday, December 30 at 11:59 PM ET**

**Course Wrap-Up: Evaluation and Celebration: December 30 – January 7****Assignment:**

- Before January 7 at **11:59 PM ET:**
  - Review online lessons
  - Submit late or missing assignments for any lesson for full credit
  - Complete the course evaluation

Access to all course lessons ends on January 7 at 11:59 pm ET.

**Snapshot – Course Schedule**

| Lesson   | Assignment   | Release Date | All-Learner Call   |
|--|--|--------------|--|
| 1: Orientation   | Orientation modules  | September 24 |  |
| 2: Organizing as a Leadership Practice                       | Project design worksheet; post organizing sentence to Facebook page                                | October 1    | #1 Organizing Sentences – October 8                                |
| 3: Public Narrative: How to Craft a Call to Action           | Public narrative   | October 15   |  |
| 4: Stakeholder & Asset Mapping                               | Stakeholder & asset map  | October 29   | #2 Public Narrative – October 22                                   |
| 5: Relational Strategizing                                   | Reflections on one-to-one meetings with key stakeholders   | November 12  |  |
| 6: Creating the Conditions for Effective Leadership Teams    | Team diagnostic checklist  | November 25  | #3 Stakeholder & Asset Mapping / Relational Strategy – November 19 |
| 7: Distributing Leadership to Co-Produce Sustainable Efforts | Distributed leadership structure diagrams and reflections; agenda for next leadership team meeting | December 10  |  |
| 8: Mobilizing Measurable Collective Action                   | Project storyboard; post your revised organizing sentence  | December 23  | #4 Collective Action – December 17                                 |
| <b>Course access ends</b>                                    |  | January 7    |  |