QualityImprovement+

In partnership with

California Primary Care Association | Community Health Solutions

Learning Lab #1: Practicing Positive Leadership

January 14, 2021

The QI+ Team

Allie Budenz
Deputy Director of QA
abudenz@cpca.org

Terry Laine
Operations Manager and
Senior Consultant
chs@chsresults.com

Ellie Nwadibia
Sr. Program Coordinator
enwadibia@cpca.org

Stephen Horan
Founder and CEO
chs@chsresults.com

Kokaale Amissah – Aidoo
Assistant Director of
Education and Training
abudenz@cpca.org

QualityImprovement+

The QI+ Program

Purpose

- To help health centers improve and sustain the infrastructure needed to provide high quality care in an ever-changing environment

Participants

- Health center staff responsible for leading quality improvement efforts within their organizations

Webinars and Office Hours

- Six webinars on key topics with guest presenters
- Monthly office hours to connect with facilitators

Self Directed Learning

- On topics of your choice through the online learning portal platform

Peer Learning

- Opportunities to learn from statewide and national peers throughout the program

Applied Learning

- Applied projects to bring learning home to your health center

QualityImprovement+

QI+ Group Learning Events

All live webinars are scheduled from 10:00 a.m. to 11:30 a.m. PST and will be recorded.

The Objectives of QI+

Module 1: Positive Leadership

- Learn and apply the six proven practices for positive leadership.

Module 2: Continuous Improvement

- Develop skills that reinforce a culture of continuous improvement across the organization.

Module 3: Data and Measurement

- Learn and apply strategies to establish and sustain a culture of data and measurement.

Module 4: Design Thinking for Quality Improvement

- Apply design thinking as a creative team strategy for solving complete challenges in QI.

Module 5: Quality Improvement for Health Equity

- Promoting health equity through quality improvement studies and activities.

Module 6: Quality Improvement for Telehealth

- Support organizational learning about quality improvement for virtual care models.

Continuing Medical Education Credits

The AAFP has reviewed Quality Improvement+, and deemed it acceptable for AAFP credit. Term of approval is from 01/14/2021 to 07/08/2021. Physicians should claim only the credit commensurate with the extent of their participation in the activity. Credit approval includes the following session(s):

- 1.50 Online Only, Live AAFP Elective Credit(s) - Positive Leadership
- 1.50 Online Only, Live AAFP Elective Credit(s) - Continuous Improvement
- 1.50 Online Only, Live AAFP Elective Credit(s) - A Culture of Data and Measurement
- 1.50 Online Only, Live AAFP Elective Credit(s) - Design Thinking for Quality Improvement
- 1.50 Online Only, Live AAFP Elective Credit(s) - Quality Improvement for Health Equity
- 1.50 Online Only, Live AAFP Elective Credit(s) - Quality Improvement for Telehealth

Participants must attend the live session to claim CME. To claim your credits, please email Kokaale Amissah-Aidoo at kaidoo@cpca.org after the final session on July 8, 2021. Attendance will be verified at that time. CPCA will provide attendees with a certificate of completion; attendees are responsible for reporting their own credits.

What's this about a project?!

- In QI+ we use an **applied learning approach** to enrich and reinforce the insights and strategies presented in the program.
- We ask each QI+ participant to select an **actual QI project at your health center** to be your **QI+ Applied Project**.
- We encourage you to apply what you are learning in QI+ in managing your chosen project and other QI+ activities.

QI+ Practice Coaching Office Hours

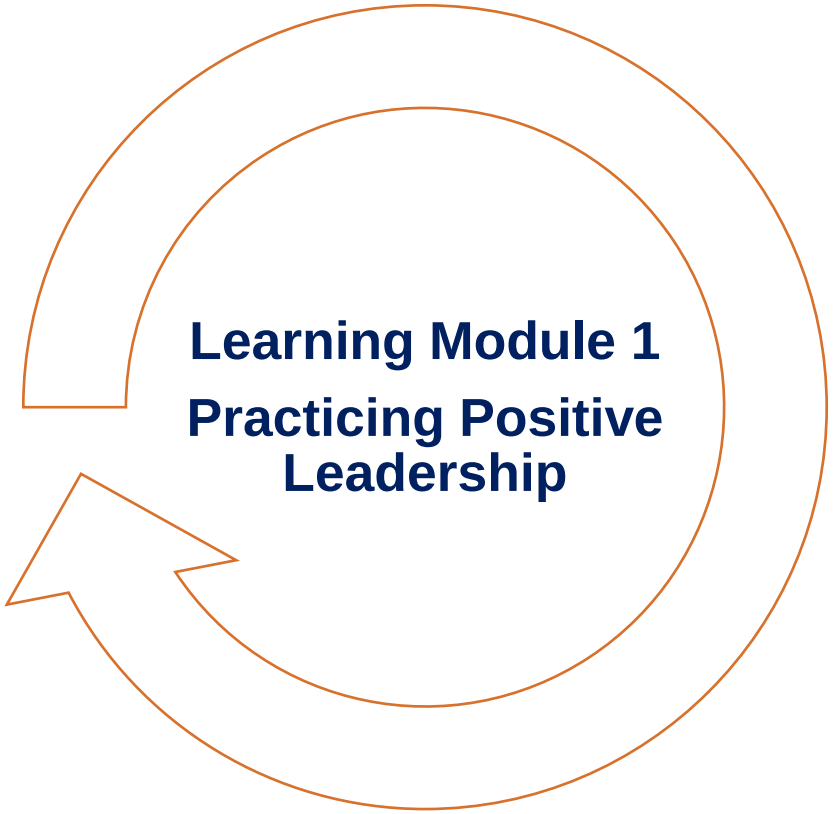
- This is your time to bring questions, concerns, and celebrations that will help you on your journey.
- Thirty-minute coaching sessions are available the Friday after the live session from 11 a.m. to Noon.
- Reserve your time in advance using this Doodle Poll Link. We will send you an email with calendar hold and zoom log-in as confirmation.
- Available Dates:

  January 15, 2021
  March 12, 2021
  April 9, 2021
  May 14, 2021
  June 11, 2021
  July 9, 2021

QI+ Technology Resources

1. Zoom
2. CPCA Learning Portal Platform – QI+ Insights and QI+ Toolbox
3. QI+ Mural Board
4. QI+ Insights Newsletters

Let’s get started!



Focus

The power of positive leadership

Positive leadership is a proven set of strategies for helping people learn, grow, and deliver their best every day.

QI leaders have always played a vital role in helping health centers assure and improve quality.	Today that role is even more important, and in some ways more challenging, as care teams learn to work together in new ways.	It helps to have a personal leadership strategy that we can lean on to help our teams do their best in each situation.

The power of positive leadership

To **focus your learning**, we encourage you to make a personal commitment to practice positive leadership in...

1. Managing your QI+ Applied Project.

2. Managing your other key activities and projects.

3. Helping individual team members learn, grow, and deliver their best.

What have we learned from experience?

Mural Board Question #1

Have you ever worked for a leader who had a **negative impact** on you or the team?

On the Mural Board, briefly share one important lesson you learned about leadership from that **negative** experience.

What have we learned from experience?

Mural Board Question #2

Have you ever worked for a leader who had a **positive impact** on you or the team?

On the Mural Board, briefly share one important lesson you learned about leadership from that **positive** experience.

Eight key insights from the field

1. A working definition of positive leadership	• As a working definition, think of **positive leadership** as the daily practice of elevating **people** and **performance** in support of the **mission**.
2. The evidence for positive leadership	• The **evidence** for positive leadership has been shown in research on individual and organizational performance.
3. Positive leadership in challenging times	• Positive leadership is especially important for helping people feel **connected and supported** during times of personal or professional difficulty.

Eight key insights from the field

4. Leading from the middle

- As QI leaders we often need to '**lead from the middle**' to gain support of individuals outside our scope of formal authority, including people up, down, and across the organizational hierarchy.

5. Culture matters

- From research on the culture of **high-performing organizations**, we know that people are more likely to flourish at work if they experience positive **meaning, relationships, and emotions** in the workplace.

6. Self-determination matters

- From research on **self-determination theory**, we know that professionals are more likely to engage and do their best if they have a sense of **competence, decision autonomy, and relatedness (**connection to others in a shared mission.)

Eight key insights from the field

7. Strategic thinking

- **Strategic thinking** is the ability think strategically about how to manage situations in ways that optimize the present and future of your organization.
- Strategic thinking is a **key leadership skill** that is often overlooked in leadership development programs.

8. The five practices of exemplary leadership

- The Five Practices of Exemplary Leadership (defined by Kouzes and Posner) is an evidence-based framework for practicing positive leadership.
- The five practices include **model the way, inspire a shared vision, challenge the process, enable others to act, and encourage the heart**.

Six strategies for practicing positive leadership

Based on insights from the field we can consider **six promising practice strategies** for positive leadership:

We can begin **applying these strategies** immediately in our chosen QI+ Project and our other daily activities as QI leaders

1) Assess the situation

2) Model the way

3) Inspire a shared vision

4) Challenge the process

5) Enable others to act

6) Encourage the heart

Six strategies for practicing positive leadership

Six strategies for practicing positive leadership

1) Assess the situation
- Define the challenge
- Consider needs and interests
- Envision an ideal outcome

2) Model the way
- Envision your role
- Clarify your values
- Set the example

3) Inspire a shared vision

4) Challenge the process

5) Enable others to act

6) Encourage the heart

Six strategies for practicing positive leadership

1) Assess the situation
- Define the challenge
- Consider needs and interests
- Envision an ideal outcome

2) Model the way
- Envision your role
- Clarify your values
- Set the example

3) Inspire a shared vision
- Clarify your vision of success
- Enlist others in visioning
- Keep the vision front and center

4) Challenge the process

5) Enable others to act

6) Encourage the heart

Six strategies for practicing positive leadership

1) Assess the situation
- Define the challenge
- Consider needs and interests
- Envision an ideal outcome

2) Model the way
- Envision your role
- Clarify your values
- Set the example

3) Inspire a shared vision
- Clarify your vision of success
- Enlist others in visioning
- Keep the vision front and center

4) Challenge the process
- Streamline workflows
- Experiment to generate small wins
- Learn and improve

5) Enable others to act

6) Encourage the heart

Six strategies for practicing positive leadership

- 1) Assess the situation
  - Define the challenge
  - Consider needs and interests
  - Envision an ideal outcome
- 2) Model the way
  - Envision your role
  - Clarify your values
  - Set the example
- 3) Inspire a shared vision
  - Clarify your vision of success
  - Enlist others in visioning
  - Keep the vision front and center
- 4) Challenge the process
  - Streamline workflows
  - Experiment to generate small wins
  - Learn and improve
- 5) Enable others to act
  - Clarify roles
  - Foster shared goals
  - Address obstacles
- 6) Encourage the heart

QualityImprovement+

Six strategies for practicing positive leadership

- 1) Assess the situation
  - Define the challenge
  - Consider needs and interests
  - Envision an ideal outcome
- 2) Model the way
  - Envision your role
  - Clarify your values
  - Set the example
- 3) Inspire a shared vision
  - Clarify your vision of success
  - Enlist others in visioning
  - Keep the vision front and center
- 4) Challenge the process
  - Streamline workflows
  - Experiment to generate small wins
  - Learn and improve
- 5) Enable others to act
  - Clarify roles
  - Foster shared goals
  - Address obstacles
- 6) Encourage the heart
  - Provide support
  - Recognize contributions
  - Celebrate values & victories

Breakout for case discussion

For this case we will use two handouts titled *Positive Leadership Case Discussion* and *Strategy Checklist for Positive Leadership*

We will discuss the case in a ‘pair and share’ exercise to begin applying the six strategies for practicing positive leadership.

We will send you in pairs to a Zoom ‘breakout room’ where you can have a conversation about the case with a partner.

When we return to full group, we will ask you to share one or two insights gained the case discussion.

Breakout for case discussion

Kerry	• Kerry (she) is the Clinical Quality Manager responsible for developing and implementing the QA/QI plan for Valley Health Center.
Valley Health	• Valley Health is a federally qualified health center with two locations in a rural region. The case mix is 25% uninsured, 37% Medicaid, 28% Medicare, and ten percent private or other insurance. Valley Health has been operating for 27 years, and has a reputation for high quality and effective management.
The Challenge	• The medical director at Valley Health has asked Kerry to develop a QI plan and set of clinical quality measures for patients with depression and diabetes. The plan and measures will be necessary for participating in a value-based payment program with a Medicaid health plan.
The Dynamics	• Kerry is excited about the initiative, but also anxious about how to get started. She knows from experience that the medical service and the mental health service operate independently, with no track record of collaborating for quality. She also anticipates needing to work with the IT team to create the kinds of decision supports and data sets that will be needed to support care management and quality measurement. IT appears to be overwhelmed with requests these days, so it might not be easy to get their attention.
Getting Started	• How can Kerry get started on this project by practicing positive leadership? Consider the case questions from Kerry's perspective.

Apply

Breakout for case discussion

Positive Leadership Case Discussion

QualityImprovement+

Instructions

This case analysis is designed to help you begin applying the six strategies for practicing positive leadership in a real-world situation. Read the case presentation, then discuss the questions below based on the six strategies for positive leadership. Spend 2-3 minutes on each question so you can get a better sense of each strategy. The six strategies are outlined on the accompanying *Positive Leadership Strategy Checklist*.

The Case

Kerry (she) is the Clinical Quality Manager responsible for developing and implementing the QA/QI plan for Valley Health Center. Valley Health is a federally qualified health center with two locations in a rural region. The case mix is 25% uninsured, 37% Medicaid, 28% Medicare, and ten percent private or other insurance. Valley Health has been operating for 27 years, and has a reputation for high quality and effective management.

The medical director at Valley Health has asked Kerry to develop a QI plan and set of clinical quality measures for patients with depression and diabetes. The plan and measures will be necessary for participating in a value-based payment program with a Medicaid health plan.

Kerry is excited about the initiative, but also anxious about how to get started. She knows from experience that the medical service and the mental health service operate independently, with no track record of collaborating for quality. She also anticipates needing to work with the IT team to create the kinds of decision supports and data sets that will be needed to support care management and quality measurement. IT appears to be overwhelmed with requests these days, so it might not be easy to get their attention.

How can Kerry get started on this project by practicing positive leadership? Consider the questions below from Kerry's perspective.

1. Assess the situation	☐ What are two or three key dynamics Kerry should be thinking about as she assesses the situation?
2. Model the way	☐ How could Kerry begin to model the way for this project through personal behavior?
3. Inspire a shared vision	☐ Who could Kerry engage in defining a shared vision of success on this project?
4. Challenge the process	☐ What types of process problems should Kerry anticipate as the team tries to integrate medical and dental care for patients with depression and diabetes?
5. Enable others to act	☐ Which of the key stakeholders might have problems creating time or authorization to work on this project?
6. Encourage the heart	☐ How can Kerry begin to encourage the hearts of the people who need to be engaged in this project?

Notes:

Use the strategy checklist as a reference for your discussion.

Try to spend about two minutes discussing each question, but don't rush if you are having a good discussion!

Strategy Checklist for Postive Leadership

QualityImprovement+

Use this checklist as a guide for practicing positive leadership. You can apply the six strategies when leading a team, a project, or an organization.

1) Assess the situation → 2) Model the way → 3) Inspire a shared vision → 4) Challenge the process → 5) Enable others to act → 6) Encourage the heart

Strategy 1 – Assess the situation

- ☐ Define the challenge to be addressed.
- ☐ Consider the needs and interests of the organization and the people involved.
- ☐ Envision an ideal outcome for the organization and the people involved.

Strategy 2 - Model the way

- ☐ Envision what role you should play in the particular situation.
- ☐ Clarify your personal and professional values as they relate to the situation.
- ☐ Model the way by aligning your words and actions with your values.

Strategy 3 - Inspire a shared vision of success

- ☐ Clarify your own vision of success for the project or situation.
- ☐ Enlist others in defining a shared vision of success.
- ☐ Keep the vision of success front and center throughout.

Strategy 4 - Challenge the process

- ☐ Streamline workflows wherever you can.
- ☐ Experiment and take thoughtful risks to generate small wins that can add up over time.
- ☐ Learn from experience and stay focused on continuous improvement.

Strategy 5 - Enable others to act

- ☐ Clarify roles for the key people involved.
- ☐ Foster collaboration by promoting cooperative goals and building trust.
- ☐ Address obstacles that are preventing key people from taking positive action.

Strategy 6 - Encourage the heart

- ☐ Provide (or facilitate) support to help people stay engaged and produce results.
- ☐ Recognize others by showing appreciation for individual contributions.
- ☐ Celebrate positive values and small victories along the way.

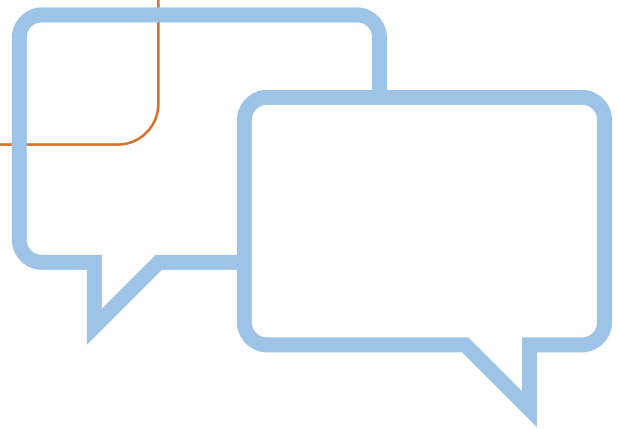
Notes:

QualityImprovement+

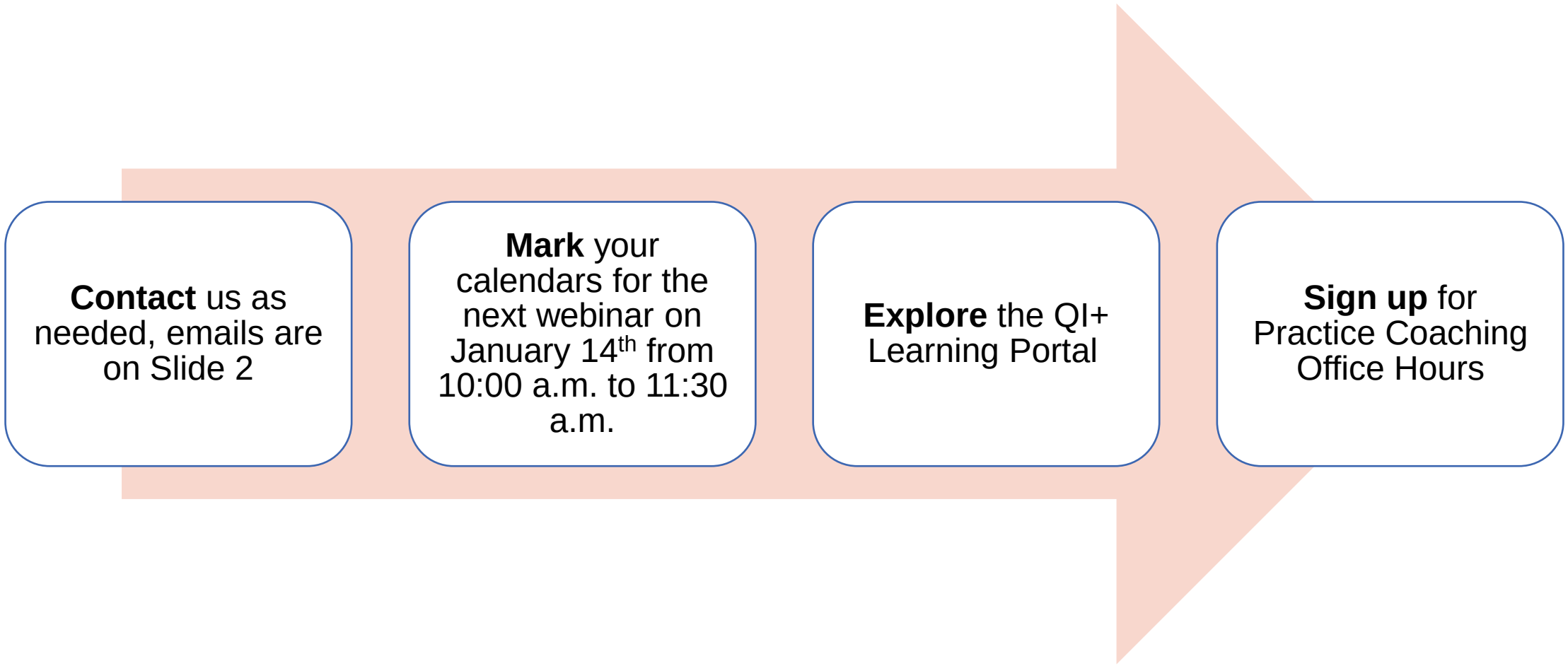
California Primary Care Association | In partnership with Community Health Solutions

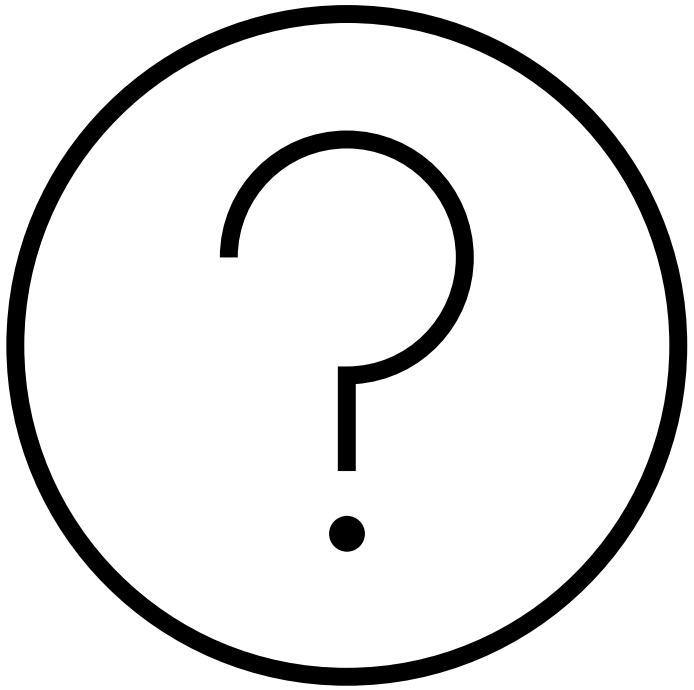
Share: Insights, ideas, and lessons learned

Please share one insight, idea, or lesson learned from the case discussion.



Housekeeping and Next Steps





Questions?
Suggestions?
Feedback?