



**WACMHC**  
Washington Association of  
Community & Migrant Health Centers

integrated  
**WORK**

# Leading People Through Transition: A 4D Approach to Transformation

WACMHC QI Roundtable

November 5, 2018





# WACMHC

Washington Association of  
Community & Migrant Health Centers

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Quality Improvement Roundtable

**Leading People Through Transition**

**A 4D Approach to Transformation**

November 5, 2018 | Yakima, WA

# Housekeeping

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- Building information
  - ✓ Restrooms
  - ✓ Exits
  - ✓ Wifi
  - ✓ Sign-in
  - ✓ Refreshments
- Folder overview
  - ✓ Agenda & Notes
  - ✓ WACMHC Directory
  - ✓ Participant List
  - ✓ Case Study
- Evaluation

# WACMHC ROUNDTABLE AGENDA

November 5, 2018

Yakima Area Arboretum

9:00 AM



## Welcome and Overview

Opening and Context for the Day



## Building Community: Our Change Challenges

Who we are and what we are facing



## Leading Change: Moving People to Action

Making a lasting difference



## BREAK



## Exploring the 4 Dimensions of Transformation

Design, Develop, Delegate, Do



## A Powerful Launch: Design for Impact

*Designing* effective change and clarifying your direction

12:00 PM



## LUNCH



## Partner Walk

Exploring change challenges



## A Powerful Launch: Developing Courage and Competence

*Developing* teams to take bold action and deliver lasting impact



## BREAK



## Moving to Action: Delegate and Do

Handing off commitment and shaping effective coordinated action



## Appreciative Close

For what are we grateful? To what are we committed?

4:00 PM



## End

# Our Objectives

- ✓ Understand the People Side of Change
- ✓ Master the Four Dimensions of Transformation: Design, Develop, Delegate, Do
- ✓ Design effective change and develop teams to deliver lasting impact
- ✓ Build a takeaway plan for change to implement at your own organization

# Building Community

## Surprises and Superpowers

### Choose 3 cards to introduce yourself:

- One thing that might **surprise** people about you
- Your **superpower** –what people can reliably count on you for
- Something that represents **the change you are facing**– your pressing challenge



# WHERE WE ARE HEADED

A silhouette of an elephant and a rider is shown against a bright yellow sunset sky. The elephant is walking towards the right, and the rider is seated on its back. The foreground shows the dark silhouette of a field with some small plants.

# To Change Behavior

**DIRECT THE RIDER**

**MOTIVATE THE ELEPHANT**

~Jonathan Haidt (2006)





## DIRECT THE RIDER

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Follow the  
Bright Spots

Script the  
Critical Moves

Point to the  
Destination



## MOTIVATE THE ELEPHANT

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Find the Feeling

Shrink the Change

Grow Your People



## SHAPE THE PATH

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Tweak the  
Environment

Build Habits

Rally the Herd

A topographic map with a compass and a ruler. The map shows contour lines, roads, and various geographical features. A compass is placed over the map, and a ruler is positioned vertically next to it. The text "EXPLORING THE 4 DIMENSIONS OF TRANSFORMATION" is overlaid on the left side of the map.

# EXPLORING THE 4 DIMENSIONS OF TRANSFORMATION



## A Blueprint for Applied Leadership and Transformation

Getting where you are going requires leadership clarity and knowing what is needed to bridge the gap between where you are today and where you are headed as well as a personal commitment to growing your leadership to meet the challenges ahead.

What is personally important to me about the change ahead?

What measurable difference am I committed to making?

How will I need to grow myself to deliver?

# Let's begin!

# The 4 Dimensions of Leading Transformation



## Design

- Determine where you are going
- Define the strategies, structures, and systems that support success & set you up to win



## Develop

- Figure out how you will get there
- Identify mental models & skillsets needed to grow courage and capability in others



## Delegate

- Give others confidence in their ability to find their way
- Generate commitment & clarify expectations



## Do

- Ensure role clarity
- Build feedback systems
- Get into coordinated action!

# Case Study: Replicating a team-based care pilot across Primary Care

Martina works as a Nurse Practitioner at a Community Health Center that has chosen a team-based care model as part of their value-based reimbursement initiative. The pilot project has gone extremely well, early metrics are encouraging enough that leadership has decided to broaden the roll-out to include all Primary Care practices.


Martina has been handed the responsibility for the roll-out. While an exciting opportunity, it has its challenges:

- The pilot team was made up of top performers, their success is not surprising, and Martina is concerned that replicating the program may not produce the same results in the same timeframe.
- She heard the CFO make a presentation that shows financial benefits happening as soon as the program is in place and wonders if that is realistic.
- Medical Assistants in this organization have historically been underutilized, many of the good ones left once they saw that there was little room to stretch and grow. Those who are left are not known for taking initiative.
- Finally, for all of its benefits, team-based care will require clinicians to do things differently. This has been a challenge in the past and there are some providers who have so far been able to avoid participating in change initiatives due to their tenure and/or unwillingness to try something new.
- Her first task is to select her team, she has two weeks to pull together a plan to share with the CMO who is sponsoring this work.



Chart your Course...

# DESIGN THE FUTURE

A Newton's cradle with five silver balls and one red ball. The red ball is in motion, having just struck the other balls or about to. The background is dark blue.

*“All organizations are perfectly designed to get the results they are now getting. If we want different results, we must change the way we do things.”*

*~ Tom Northrup  
management expert and author*



# design

Determine where you are going and define the strategies, structures, and systems that will set you up to win



where we are going and what will support us on the way...

The Challenge

What success looks and feels like

Strategies, skills, and structures to achieve what is most important

## Define Martina's Challenge...



# Small Group Discussion: Design

- Using the **Design card** questions, reflect on a your design challenge.
- Break into **small groups** and share your thoughts with your peers.
- As a group, **choose one person's situation** to share with everyone in the room.



REFLECTION

REFLECTION

What is your design Challenge?

Name the gap

Explore it with a partner as you walk (3x5s)

Come back with a new insight!

# LUNCH AND PARTNER WALK

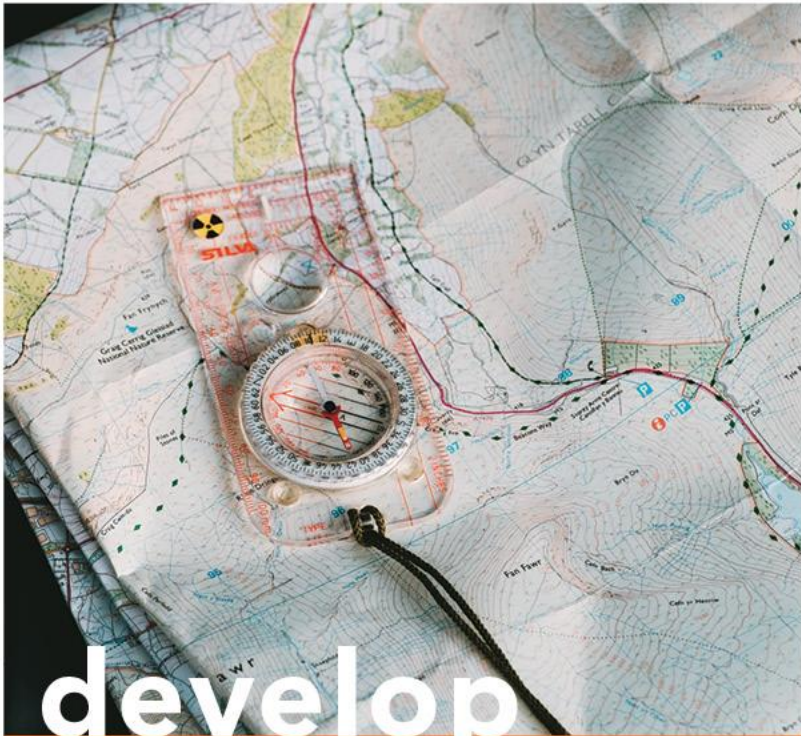
Show the Way...

# DEVELOP YOUR PEOPLE

A photograph of a rugged coastline at night. A lighthouse is visible on a cliff in the distance, and a large rock formation stands in the ocean. The sky is dark with some stars visible.

*“Great Necessities Call  
forth Great Leaders.”*

*~ Abigail Adams*



# develop

Figure out how you will get there and identify the mental models and skillsets needed to grow courage and capability in ourselves and others



what is needed to get us from here to there...

Strengths to build on

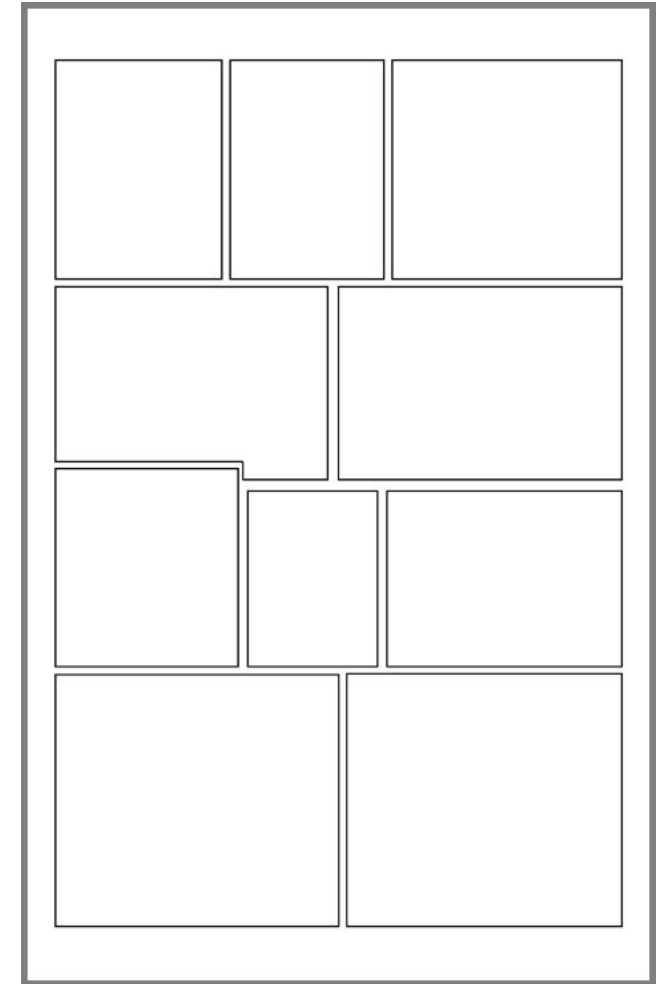
Things we need to let go of

New skills to develop in ourselves and others

What must  
Martina grow in  
others to get  
where she is  
going?

# Develop your team to deliver

- Find a table of folks with projects somewhat similar to yours
- Discuss the skills and attributes that will need to be developed in the team to deliver the desired results.
- Draw a representation of the person with those attributes (big heart, keen eyes, careful hands...) on one piece of paper.
- Now, discuss what you will need to do as leaders to develop those skills.
- Build a “comic strip” that shows the steps you would take to move someone from where they are today to this “high-performer” you need them to be.



Generate Commitment...

# DELEGATE THE WORK







*“Promises are the  
uniquely human way of  
ordering the future”*

*~ Hannah Arendt*



# delegate

Give others confidence in their ability to find their way, generate commitment, and clarify expectations



what will generate true commitment...

My expectations

What will motivate commitment

How I will assess and appreciate success

What must  
Martina do to  
delegate  
commitment...?

# Delegation Role Play

Break into groups of two and choose your role:

- **The Delegator:** Choose a situation in your life that you'd like to delegate to someone else (professional, personal, etc.)
- **The Delegatee:** Listen to the assignment and ask questions to improve clarity and reduce confusion.
- Provide coaching to your partner.

Accomplish Your Goals...

# DO WHAT IT TAKES



*"So often people are working hard at the wrong thing. Working on the right thing is probably more important than working hard."*

*~ Caterina Fake*





do

Ensure role clarity, build feedback systems,  
and get into coordinated action!



what coordinated action looks like...

What is our role?

What is my role?

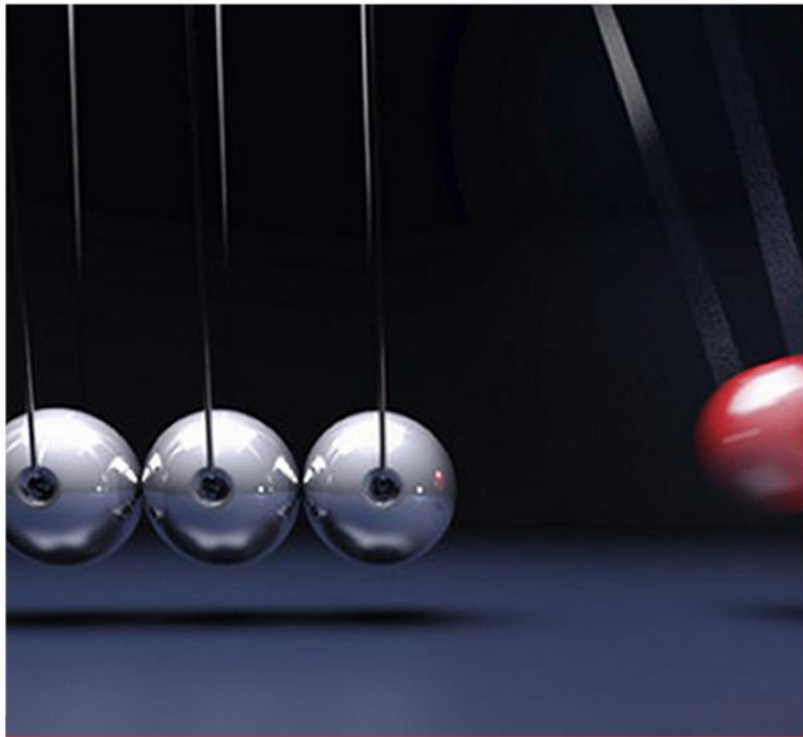
How can I be most effective?

What roles must  
be clearly  
defined?

# Rhythms of Alignment and Connection

What routines and forums currently exist that could be repurposed – in whole or in part – to ensure that the people you are counting on:

- Are aligned and connected about this work
- Have a venue to share progress and get coaching/answers as needed
- Have a way see early warning signals and course correct early



## Assessing Impact

Setting up feedback loops and learning systems helps you track progress and true-up your efforts along the way to amplify your impact and make a bigger difference. Take a moment to reflect on how you will measure success...

What specific outcomes will serve as indicators of success?

How will I assess return on my effort?

What valuable difference will I have made when I am successful?

How will I seek feedback on my contribution?



# Table Discussion: Metrics

With the other people at your table, discuss key metrics for the project you've been discussing.

Share feedback and ideas to make them even better.



## Leadership Reflection and Next Steps

Moving an organization or group forward requires leaders to find their edge and stretch beyond it to grow the people and systems around them. Reflect on what you are learning about yourself and your own leadership through this work.

What I am finding gives me energy and joy...

What I am finding gives me stress and worry...

My personal commitment to growing myself...

*Final comments & questions and  
Where would you like to be by our first check-in call?*

# DISCUSSION

# Keep the conversation going!

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Virtual check in sessions will provide support as you implement your action plan and allow you to continue learning from the experiences of your peers.

You will receive reminders from GoToWebinar to attend these sessions.

**Join us on December 6<sup>th</sup> and January 9<sup>th</sup>  
from 12:00 – 1:00 pm**

Contact WACMHC at [QualityImprove@wacmhc.org](mailto:QualityImprove@wacmhc.org)