VHA Innovators Network

Innovation Program Playbook

VHA's Model for Workplace Innovation

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Office of Healthcare Innovation and Learning

ie VHA Innovation Ecosystem

Aspen Labs

Promoting a Culture of Innovation

If you are reading this, you have most likely been told "no" one too many times. Perhaps you have hit a few roadblocks or noticed outdated practices in your workplace, leading you to frequently and exasperatedly exclaim "why?!". You are also a brave leader desperate to change the culture of your organization. Through this Playbook, the Veterans Health Administration (VHA) Innovators Network (iNET) can help guide you towards your future innovation program. The catalyst for the change? Innovation. Embracing your front-line power and passion to make a grassroots change.

VHA is America's largest integrated health care system, providing care at 1,321 health care facilities, including 172 medical centers and 1,138 outpatient organizations of care of varying complexity (VHA outpatient clinics), and serving 9 million enrolled Veterans each year. Within VHA, iNET was launched in 2015 in response to an annual employee survey, which found that some employees did not feel encouraged to try new things at work. To determine the root cause of the unsatisfactory survey results and brainstorm solutions, a team of VHA employees and Presidential Innovation Fellows conducted a large-scale, human-centered design (HCD) project across multiple VA medical centers (VAMCs). They determined that a top-down approach was not always the appropriate route to innovation. Employees were often in the best position to solve their day-to-day challenges, and what they needed were resources to frame the challenges and design solutions. Perhaps most importantly, they needed to be encouraged and recognized as individuals, uniquely important contributors to VA's mission. Since starting with eight sites in 2016, iNET has grown to include over 40 VA medical centers today.

In today's iNET much has changed, but the focus on front-line employees has not. The mission has grown beyond supporting innovative ideas from the front-line, to utilizing innovation as a cultural competency to change organizational culture.

Utilizing innovation as the catalyst for cultural change isn't just for healthcare. This Playbook can be used by any organization with a desire for change, looking for structure and a place to start.

Throughout this Playbook, you will be introduced to 18 core competencies, which when executed, stimulate a culture of innovation and construct a roadmap for facilitating change. This change does not have to be resource intensive, but it does require a leader. The competencies listed will primarily be done by an individual or team within your organization. At iNET, these boots-on-the-ground innovation program leaders are called Innovation Specialists. As the backbone of iNET, Innovation Specialists use the tenets of this Playbook to guide change through their lens and perspective.

Good luck on your innovation journey! Thank you for considering our program as a model for what you are trying to build at yours.

Sincerely,

Allison Amrhein, MPH
Director, VHA Innovators Network

New to iNET? Welcome!
Read a special welcome letter here

How to Use This Playbook

The Playbook is written from the perspective of the aforementioned Innovation Specialist. Again, within iNET, that is the front-line innovation program lead at each participating VA medical center. In your budding innovation program, this is simply an individual or team within your organization who is tasked with teaching, facilitating and disseminating innovation-related competencies. Within this Playbook, we will use the term "program lead" instead of Innovation Specialist specifically (we not so secretly wish we could trademark "Innovation Specialist" just for us). To review, the Playbook is written from the "second person" perspective; program lead = you.

Playbook competencies are grouped into three sections.

| **Level One** | These concepts are foundational, and the knowledge you will gain from each of them will inform your learnings in other areas. |

| **Level Two** | These are transitional competencies. They build upon the foundational knowledge gained in Level One. |

| **Level Three** | These are mastery level competencies. They represent the most challenging skills, and knowledge from Level One and Level Two is essential. |

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How to Use This Playbook

Every competency starts with an explanation of its relevance for you as program lead, followed by practical scenarios to help you grasp potential real-world applications of this knowledge. We then delve into each competency's implications when working with front-line employee innovators and collaborators before wrapping up with a list of learning objectives to help assess your current knowledge and understand what it would take to be an expert in each area.

While every journey is unique, you should rate yourself as "proficient" for all competencies in Levels One and Two within one year of joining an established innovation program. If you are launching an innovation program from scratch, the road map is the same; the timeline might stretch a few more months. The "tools and templates to support this skill" section contains a variety of resources to assist and enhance your learning. If you do not feel "proficient" within this time-frame it does not mean you're failing at your job! Work closely with a mentor and use the learning objectives at the end of each chapter as a guide for future discussions.

Generally, you should be "proficient":

Level One	Level Two	Level Three
Within 6 Months as program lead for Level One competencies	*Within 12 Months as program lead for Level Two competencies*	*Within 18 Months as program lead for Level Three competencies*

Playbook Key

Tools and Templates That Support Your Skills

Article

Organization

Book

Video

Skillsoft Book

Tools

Skill Levels

Novice

Proficient

Expert

Links and VA Specific Links

Link

VA Only Link

VA Specific Information

Information for VA Only

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What Do We Mean by "Competencies"?

A competency highlights the knowledge, skills and abilities required to be successful in an identified area. Collectively, the competencies in this Playbook reflect the skill set from our innovation program, skills that an experienced Innovation Specialist possesses and utilizes day-to-day (reminder: we will use "program lead" synonymously throughout). Each competency is written assuming that you are starting your innovation program at a beginner (novice) level of understanding and experience in that area. The stages of competency and skill development shared in this playbook are built on the research Dreyfus and Dreyfus (1980); Benner (1984); and Zuber (2016).

Next, we have outlined three stages of learning: novice, proficient, and expert. Tiered learning objectives are found at the end of every competency section to help you understand your individual starting point and track your program's growth over time. A stage of learning is considered complete once you have self-identified as acquiring all of the defined knowledge and skills at that level.

> *Disclaimer: Do not wait to become an expert in a competency before you take action. Successful program leads "learn by doing." Get started!*

*A number of competencies in this Playbook were co-created with **Aspen Labs**.*

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What Do We Mean by "Competencies"?

Novice

These learning objectives reflect the initial skills, knowledge and abilities needed for a given competency. You likely have limited or no experience in the identified competency if you identify as a Novice. You perform best with clear rules about what you do and when you do it. You require guidance, instruction and practice to develop your skills to the next level. You have gained enough experience to have discovered some approaches that work, as well as some that don't.

Proficient

You possess a higher level of competence and proficiency as demonstrated by your ability to work independently. These learning objectives reflect a solid foundation in the subject matter, and, through experience, you may have developed your own way of doing things. You feel comfortable beyond the core concepts and can confidently contribute to the advancement of others on the subject.

Expert

You are at the pinnacle of mastery within a specific competency. In addition to the other milestones you have achieved, the skill is now intuitive, meaning that you can find yourself in a "flow" that feels almost effortless. Experts have extensive knowledge, deep expertise and a vision of what could be ultimately possible on the subject. You may contribute to creating novel approaches, new research on the subject or the creation of new programs.

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Level One Competencies:

Foundational

1.1 Organizational Awareness

1.2 Innovation Strategy

1.3 Human-Centered Design

1.4 Facilitation

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1.1 Organizational Awareness

A strong level of organizational awareness will help you understand the relationship between different work groups, teams and individuals within your organization, and help you develop new connections. You'll use this knowledge frequently to help innovation project teams and employees succeed and gain acceptance of their innovative new ideas.

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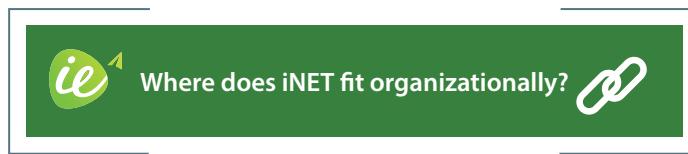
Organizational Awareness

What It Is

An organization is a collection of interconnected elements that share common values, rules, and norms and work together toward a particular purpose. Organizational awareness is understanding an organization's patterns and power structures and appreciating that a change to one element can provoke a change to the entire system.

Developing this knowledge will allow you to create connections between the people, teams and systems that support the discovery, implementation and spread of innovative new ideas and solutions. It will also help you anticipate how new initiatives align with your organization's strategic goals and values, drive internal change, introduce new ideas and increase the likelihood of implementation and adoption of new products and programs.

Where does iNET fit organizationally?

When and How This Shows Up at Work

You will draw upon your organizational knowledge every day as you seek to identify potential project investees and collaborators. You will leverage your connections to help projects progress through the discovery, design and implementation stages of HCD. Organizational awareness will help you predict how new projects will be received by internal teams and work groups and will guide employees toward ideas and solutions that align with your existing organizational culture and values.

To drive successful internal change, you must fully understand your organizational landscape, identify and engage informal networks and connect with internal stakeholders to solve complex problems and turn innovative ideas into reality.

Did You Know?

A research team at the University of Toronto's Rotman School of Management recently found that formal rank in a company's organizational chart was not the most important predictor of an employee's ability to carry out successful internal change. The most effective change agents understood and connected with their internal systems, regardless of official position. They could read, understand and engage the informal networks within their organization that were needed to make change happen; in other words, they had organizational awareness! The full article is included in the resources at the end of this section.

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Organizational Awareness

Three Scenarios in Which Organizational Awareness Might Help in Your Role

Developing a Pitch

An employee approaches you with a new idea and asks you to help create a pitch that resonates with the specific needs, interests and values of your leadership team.

Creating a Prototype

An employee is ready to develop a rough prototype of their idea and needs to understand the teams and departments that can help bring their idea to life.

Building an Innovative Culture

Your leadership wants to leverage innovation to establish a culture of "yes," increase employee engagement and overcome change resistance at your organization.

As a program lead supporting employee innovation, you show your value in this area by:

- **Making new connections between important stakeholders and project team members** and facilitating access to valuable resources to enable collaboration, knowledge sharing and leadership support.

- **Maintaining strong relationships** with key services. For example, a strong relationship with your public affairs and medical media teams can help investees market their initiatives and gain visibility.

- **Utilizing your understanding of different work schedules and communication preferences** to help a project team engage with shift workers and other employees who do not have frequent computer access, increasing the likelihood of project adoption and success.

- **Positioning yourself as a bridge** between innovation project team members and the resources, support and connections they need to thrive.

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Organizational Awareness

Skill Levels

Novice

- Understand the concept of an organization as a collection of interconnected elements working together toward a common purpose.

- Understand the role of organizational awareness in identifying opportunities, building coalitions and understanding stakeholder dynamics within your local facility.

- Appreciate the significance of organizational awareness for success in your innovation program.

- Know the key programs within the Office of Healthcare, Innovation and Learning (OHIL) and their respective goals within VHA's organizational structure.

- Begin navigating your local organization's structure to identify and engage relevant stakeholders, collaborate with different program offices and understand how innovation initiatives may align with strategic goals.

- Identify key stakeholders across your local site using the "Organizational Awareness Checklist."

Proficient

- Possess a comprehensive understanding of VHA's organizational structure including the roles of the Under Secretary for Health (USH); Assistant Under Secretary (AUSH) for Discovery, Education, and Affiliate Networks (DEAN); and the Office of Healthcare, Innovation and Learning (OHIL).

- Recognize the significance and role of the different work groups within the Innovation Ecosystem (IE) including Diffusion of Excellence (DOE), National Centers for Innovation to Impact (NCI2I) and the Innovators Network (iNET). Begin to establish a working relationship with someone from each work group.

- Easily able to navigate your local organization's structure to identify and engage relevant stakeholders, collaborate with different program offices and align innovation initiatives with strategic goals. You are aware of and have positive working relationships with key stakeholders across your organization.

Expert

- Utilize a comprehensive understanding of the Innovators Network (iNET) and its role within the Innovation Ecosystem (IE) to identify and engage in opportunities for cross collaboration and contribute to mission-driven health care innovation.

- Effortlessly leverage organizational awareness to navigate complex systems, collaborate with local and external stakeholders, frequently engage informal networks and manage multiple successful innovation projects simultaneously at your organization.

Organizational Awareness

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Tools and Templates That Support This Skill

Articles

Books

Videos

ie⁴ Skillsoft Books

The Network Secret of Great Change Agents
by Julie Battilana and Tiziana Casciaro

The Importance of Workplace Awareness in Leadership
by Nabil Bouassaba

Organizational Awareness Can Lead to Greatness
by Lisa Lavendar and Jon Isaacson

Leadership and Self-Deception: Getting Out of the Box
by The Arbinger Institute

Leaders Eat Last: Why Some Teams Pull Together and Others Don't
by Simon Sinek

How to Build a Company Where the Best Ideas Win
by Ray Dalio

How Great Leaders Inspire Action
by Simon Sinek

The First 90 Days: Critical Success Strategies for New Leaders (Audio Book)
by Michael Watkins

The Courage to Take Command: Leadership Lessons from a Military Trailblazer
by Jill Morgenthaler

Chess not Checkers: Elevate your Leadership Game
by Mark Miller

ie⁴ Download the checklist for this competency here

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1.2 Innovation Strategy

iNET is all about innovation, employee engagement and creating the future of VHA health care. What is the overarching goal of your innovation program? The fundamental concept for an innovation program that encourages employees to push boundaries and embrace new thinking is to teach employees an easily digestible innovation strategy. Focus on what innovation is, how it is defined within your organization and how to build time for it within the constraints of the constant bustle of life.

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What It Is

Mature innovative organizations harbor a bustling community of employees who work hard to identify problems, embrace emerging possibilities and create the future. Building this community requires a comprehensive innovation strategy that effectively connects staff to these concepts in an approachable way. Before you can do that, however, you must define innovation for your organization.

iNET's curriculum for building your innovation strategy leverages principles from the book The Three-Box Solution by Vijay Govindarajan. Throughout this book, the author speaks through the literal lens of three boxes.

Box 1: *Manage the Present*

Goal:
• "Maintain current operations" at peak efficiency

Supporting Behaviors:
• Set challenging goals to achieve peak performance
• Analyze data to quickly spot and address performance gaps
• Simulate linear innovation

Mantra:
• Better, faster, cheaper

Box 2: *Selectively Abandon the Past*

Goal:
• Create space/supporting structure for non-linear ideas

Supporting Behaviors:
• Selectively abandon practices and models that are inefficient, outdated or can be improved

Mantra:
• Let it go!

Box 3: *Create the Future*

Goal:
• Generate breakthrough ideas and convert them into new opportunities

Supporting Behaviors:
• Intentionally building time to innovate into your day (daily built future)

Mantra:
• Think big, start small–fail small

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Innovation Strategy

Linear innovation is a staple of Box 1 and is essentially improving systems and processes that already exist. Non-linear innovation, as referenced above, is the creation of something new and novel. iNET is a Box 3 organization that focuses on exploring breakthrough ideas and bringing Veterans cutting edge health care. Our basic definition of innovation is "a new, novel method or model of providing health care to Veterans." What type of innovation does your new program want to support? It will be easier to build a plan and execute knowing what you're looking for.

When and How This Shows Up at Work

You will need to not only build your own innovation strategy for your organization's new program, but also support leaders and employees within your organization as they build their innovation strategy.

Three Scenarios in Which Building Your Innovation Strategy Might Help in Your Role

Define Innovation	Defining innovation within your organization is the first step. What type of innovation does your program support? You can introduce leadership and decision makers to the idea of linear and non-linear innovation to find your focus.
Teaching Front-Line Employees	You will teach the theory of The Three Box Solution to front-line employees, providing them tools and resources to develop their innovation strategy.
Engaging Leadership	Facilitate Box 2 and Box 3 activities with leadership and front-line staff, in order for them to build their innovation strategy and make space for innovation in their service.

As a program lead supporting employee innovators, you show your value in this area by:

- **Applying the principles of the appropriate box** to projects to create space for breakthrough ideas to emerge and allow for the exploration of new products, programs and business models in a safe and supportive environment.

- **Determining when Box 2 strategies might be needed** to help project teams and employees abandon ideas and attitudes that have lost relevance in a changing environment or that interfere with the process of inventing the future.

- **Balancing the application of the Box principles**—exploring the future in Box 3, selectively forgetting the past in Box 2, and collaborating with the System Redesign team in Box 1—is essential for driving successful innovation efforts and project outcomes.

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Innovation Strategy

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Skill Levels

Novice

- Understand the core concepts of The Three Box Solution and how to utilize them to facilitate building an innovation strategy.

- Are familiar with the definition of Box 1, Box 2 and Box 3 and their respective roles in driving and supporting innovation.

- Able to define linear and non-linear innovation.

- Able to co-teach iNET's Building Your Innovation Strategy class with your swim buddy or another Innovation Specialist. At this stage you likely rely on notes to effectively teach the class.

Proficient

- Lead leaders and front-line employees through Box 1, Box 2 and Box 3 exercises to deepen their understanding of where they can create space for innovation within their service.

- Easily identify ideas as linear or non-linear and determine who within your organization can support them moving forward.

- Able to independently teach Building Your Innovation Strategy. You can guide supervisors and leaders in creating psychological safety for staff and eliminating outdated practices to foster innovation using the Building Your Innovation Strategy class curriculum.

Expert

- Show mastery in utilizing the concepts and tools of The Three-Box Solution to drive transformative change and generate breakthrough ideas with services and individual employees at your organization by developing new and creative ways to connect employees with this content.

- Proficient in managing multiple Box 3 innovation projects while also selectively leveraging the skills of Box 2 when necessary. Able to seamlessly guide these discussions without needing to reference the Three Box Solution book or other materials.

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Innovation Strategy

Tools and Templates That Support This Skill

Article

Tool

Skillsoft Book

Managing Your Innovation
Portfolio
by Bansi Nagji and Geoff Tuff

iNET's Building Your Innovation
Strategy Class

The Three Box Solution
by Vijay Govindarajan

Download the checklist for this competency here

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1.3 Human-Centered Design

Businesses and health care organizations use many methods to define, understand and address problems and challenges in their work. When front-line employees in VA identify problems, iNET needs a proven methodology to help guide them to the appropriate solutions. iNET utilizes HCD to do this. HCD focuses on the people who experience the problems or challenges and the context around them, and solves problems with people, not just for them. We have had great success using HCD as our fundamental problem-solving approach; we highly recommend you do the same.

Human-Centered Design

What It Is

HCD grew from a combination of design, engineering and psychology and was formalized as a published practice in the 1950s and 1960s at Stanford University. The practice was then popularized by design firms such as IDEO in the San Francisco Bay Area. Currently it is used throughout industry, academia and health care, including (in addition to VHA) the Mayo Clinic, Kaiser Permanente and the United Kingdom's National Health Service.

Human-Centered Design is a methodology of thinking divergently and convergently that places people's needs and goals at the center of every decision, alongside business and technology concerns.

Human-Centered Design Includes the Following Steps:

1. Defining the root of a problem through primary and secondary research to ensure you're solving the right problem.

2. Understanding the complex systems, relationships and structures that influence and impact the problem.

3. Brainstorming ideas that have the potential to address the problem(s) defined.

4. Testing these ideas through small, iterative experiments and prototypes.

5. Applying lessons learned and refining ideas through each round of testing.

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Human-Centered Design

When and How This Shows Up at Work

As a program lead, you'll need to be familiar with the HCD framework in order to both teach the theory of HCD and facilitate it in practice. The HCD process is, at its core, inclusive in that it includes the voices, experiences and expertise of stakeholders from multiple disciplines, including the people for whom you're designing.

You will utilize HCD every day as you coach employees to solve problems. You will consistently guide them through each phase of HCD, from helping them find stakeholders to interviewing and synthesizing user experience testing feedback, to knowing when to start over and re-frame the problem.

Three Scenarios in Which the Principles of Human-Centered Design (HCD) Might Help in Your Role

Framing a Problem	An employee emails asking you to help them with a problem they see every day at work. Together you discuss and explore the problem and guide them through a problem framing exercise.
Solving Problems Not Implementing Solutions	An employee comes to you looking to implement an expensive solution. You introduce them to the HCD problem solving process and help them understand why further exploration of the problem is necessary.
Gaining Supervisor Support	An employee is worried their supervisor will not support their innovative idea. You guide them through early-stage discovery work to validate the problem and prove the need to obtain buy-in from their supervisor.

As a program lead supporting employee innovators, you show your value in this area by:

- **Sharing your own experiences** and/or case studies that illustrate concrete ways Human-Centered Design has been used to solve complex problems.

- **Communicating the HOW and WHY** of Human-Centered Design to keep work grounded and relevant. Teams may become overwhelmed by their problem or too fixated on a solution early in the process. Coach them so their project can provide real benefits for as many people as possible.

- **Connecting them with the right people and resources** in order to get the approvals, funds, tools and skills needed to kick-start and complete their project. The resources and connections they need for this work are different than those they may have accessed before.

- **Providing feedback throughout all stages** of their project. Iteration and feedback are key to success with HCD, but they can also be difficult to embrace and put into practice. That's where you come in.

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Human-Centered Design

Skill Levels

Novice

- Define HCD and describe its core principles.

- Explain the importance of involving stakeholders from diverse disciplines in the HCD process.

- Describe each of the five stages of the HCD process.

- Understand the HCD process such that you can work through a problem framing activity with an employee, help them identify stakeholders and prepare them to do discovery work. Able to do this while also reinforcing the need to focus on problems, not solutions.

- Explain the applicable steps and milestones that will be achieved during each of the five stages of the HCD.

- Able to co-facilitate HCD 101 workshops with your swim buddy or another Innovation Specialist. At this stage you likely rely on notes to effectively teach the class.

Proficient

- Facilitate HCD to a presented problem by outlining the steps involved, including problem definition, understanding complex systems, brainstorming, testing and refining ideas.

- Develop strategies for effectively applying HCD, including forming interdisciplinary teams, facilitating iterative experiments and sharing concrete case studies of organizations' HCD.

- Scope a project to define key outcomes, even when the solution is unknown.

- Comfortable coaching employees through each step of the HCD process in line with their monthly Spark-Seed-Spread milestones.

- Able to independently teach HCD 101 with minimal guidance and understand the desired outcome of the class is to generate interest from local staff who attend.

Expert

- Innovate new ways to incorporate HCD principles into a wide range of projects, including those with no clear or simple solutions.

- Facilitate long-term, large-scale HCD projects to solve your organization's systemic problems.

- Lead initiatives to introduce HCD and innovation throughout VHA and coach others through the HCD process, promoting its adoption within the organization. This may include volunteering to serve as HCD lead for iNET.

Human-Centered Design

Tools and Templates That Support This Skill

Videos

Course

Tool

What is Human-Centered Design?

The Changing Role of the Designer:
Practical Human-Centered Design

ABC Nightline – IDEO Shopping Cart

Luma Institute Training
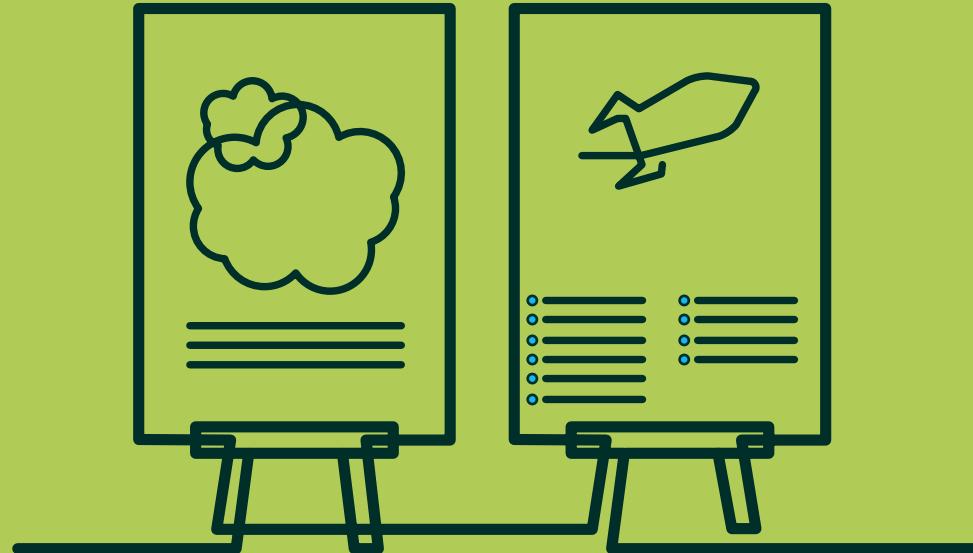
iNET Innovation Specialists - One Hour
Human-Centered Design 101

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1.4 Facilitation

We have all spent time in workshops that go around and around in circles, experienced the frustration of not being heard or even just been in meetings that only seem to yield yet another meeting on our already busy schedules.

Good facilitation can change this. The Innovation Strategy and HCD competencies focused on material you need to internalize and are expected to practice with others. Understanding the difference between presenting an educational session on these topics and facilitating one will be crucial as you engage with employees at your organization and work to teach them core innovation competencies.

Facilitation

What It Is

The base word of facilitation reveals one of its main goals: the Latin word *facilitas*, which roughly translates to "easiness." In this context, facilitation is a verb meaning "to make easy, to render less difficult" when we apply it to meetings or workshops. A facilitator is a person or group of people whose role is to utilize their experience, tools, activities and techniques to guide participants to reach a desired outcome more easily.

Your facilitation skills may need some fine-tuning if you find yourself needing to dictate the outcome of a session, quickly giving in or showing frustration when situations or people become challenging, "flying by the seat of your pants" as a go-to approach or talking more than you are listening.
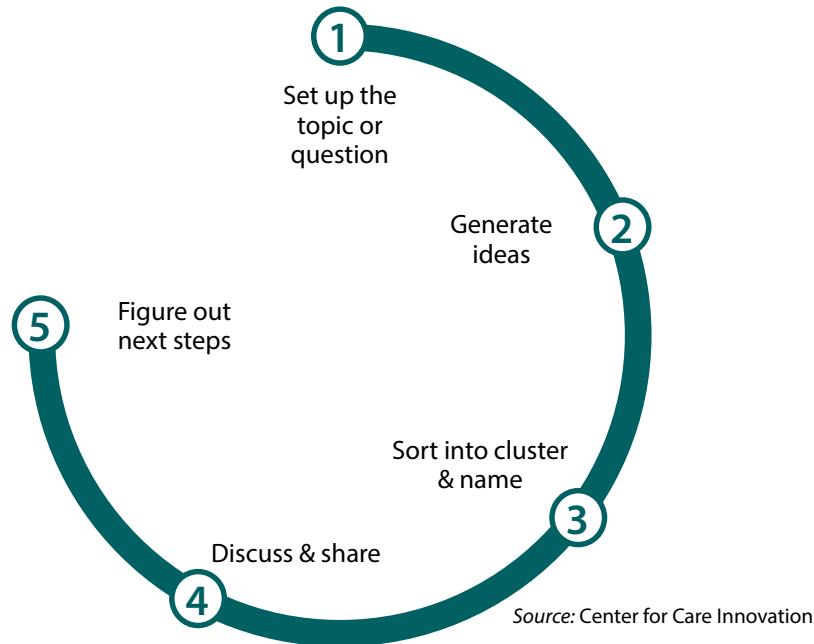
When and How This Shows Up at Work

Good facilitation techniques are one of the most important skill sets an innovation program lead can possess. Within iNET, Innovation Specialists are expected to facilitate iNET's fundamental teachings, including HCD and Building Your Innovation Strategy, on a regular basis. You may also facilitate meetings between external collaborators and employees within your organization, as well as numerous other meetings and workshops to engage and support your growing local innovation community.

You can consider your facilitation successful when it has created an equitable space (in-person or virtual) where people contribute fully and equally, and with as much ease (maybe even delight!) as possible. Successful facilitation should guide participants to reach the goal of the session/gathering in a way that the majority feels good about it.

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Facilitation

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1. Set up the topic or question
2. Generate ideas
3. Sort into cluster & name
4. Discuss & share
5. Figure out next steps

Source: Center for Care Innovation

A collaborative cycle is a basic but powerful process for a large variety of facilitator-led engagements. The activity might change, but the process is evergreen. Use the collaborative cycle as a guide to help develop your facilitation skills.

Three Scenarios in Which Facilitation Skills Might Help in Your Role

Creating a Strategic Direction	You are asked to lead a meeting with a group of stakeholders to determine a collectively agreed upon strategic direction for innovation efforts across your organization.
Planning a Greenhouse Project	You volunteer to lead a Greenhouse project, and during the kickoff call you engage participating stakeholders (e.g., employees and Veterans), obtain buy in and outline the project approach.
Teaching Innovation Curriculum	You offer an introductory HCD course to engage employees in a discussion about how and when HCD might benefit them and the audience they serve.

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Facilitation

As a program lead supporting employee innovators, you show your value in this by:

- **Sharing the work** of your innovation program, including HCD and innovation trainings, and guiding the reflections or activities that follow.

- **Guiding discussions** with stakeholders to make decisions about participation in the program, project direction or required course corrections.

- **Moving a group** through difficult conversations on topics such as staffing, funding and idea spread or acceptance as they pertain to the local programs you are leading.

- **Interfacing with people** internally and externally to your program, perhaps with start-up companies, to ensure voices are heard and decisions are made collaboratively.

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Facilitation

Skill Levels

Novice

- Identify situations when facilitation is needed and compare outcomes when facilitating vs. presenting material.

- Able to identify the foundational skills needed to guide discussions and manage group dynamics.

- Utilize established rules and guidelines for facilitating and begin to adapt approaches to move away from purely presenting material to an audience.

- Identify situations where more complex or nuanced facilitating approaches are required (i.e., changing group dynamics, difficult participants, quiet or overly talkative groups).

- Able to determine whom to include in the facilitated session and what their role could/should be.

Proficient

- Successfully and independently facilitate an educational class or meeting that creates a memorable experience (e.g., because it's fun, creates a space for vulnerability, new common ground was reached).

- Comfortable developing activities to best fit the size and knowledge of the participants, and able to adapt to in-person, virtual or hybrid settings.

- Able to adjust session approaches "on the fly" when it's determined that the group needs have changed during the course of the activity or event.

- Create follow-up assets that remind people of the work that was done and what is next to do.

Expert

- Recognize the difference between a disruptive attendee(s) and healthy conflict between participants and adjust in the moment to address and alleviate concerns.

- Lead a reflection/debrief of the session outcomes that deepens participants' understanding and clarity.

- Comfortable teaching others the skill of facilitation and the difference between presenting and facilitating.

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Facilitation

Tools and Templates That Support This Skill
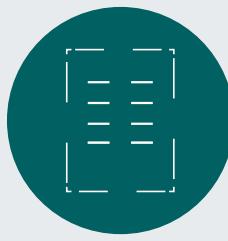
Tools	Book	Videos	Template

Tools

Liberating Structures

Ice Breakers

Book

The Art of Gathering
by Priya Parker

Videos

10 Tips to Facilitate the Perfect Meeting

Explaining an Exercise

Talk About Re-Gathering
by Priya Parker

Template

Agenda

Level Two Competencies:

Transitional

2.1 Storytelling

2.2 Relationship Building

2.3 Coaching

2.4 Finance

2.5 Purchasing

2.6 Public Speaking

2.7 Rapid Prototyping

2.8 Community Engagement

2.1 Storytelling

We've all told stories before. In social settings, a story is often for entertainment; however, storytelling at work may be more about educating or delivering an important strategy, engaging or influencing people toward a common goal, or creating empathy for another person or group of people. Storytelling may even be for creating empathy or establishing a strong connection to YOU.

Most highly effective leaders have storytelling superpowers and it is a highly useful skill for you and your employees to grasp.

Storytelling

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What It Is

"No data without stories, and no stories without data." As organizational leaders, we often believe that when we are trying to inspire action, we can do so by relaying a convincing argument based on data, facts and figures; however, research by cognitive psychologist Jerome Bruner suggests that stories are remembered up to 22 times more than facts alone. To be stronger, more impactful leaders, therefore, we need to grow our skills in crafting and delivering good stories.
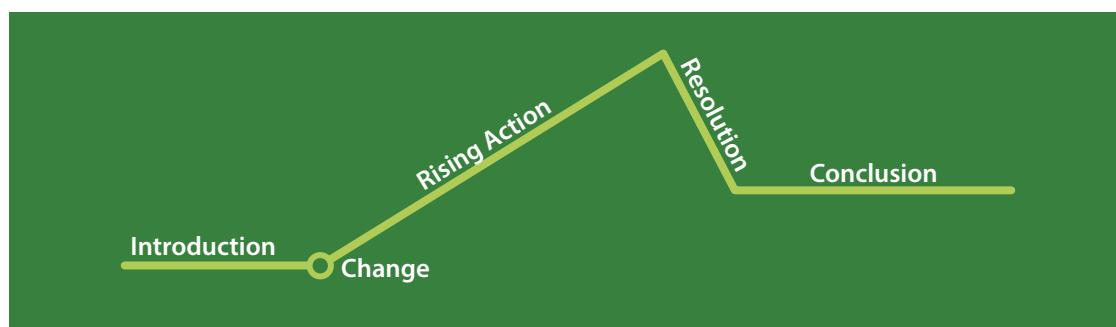
Storytelling is successful when it helps to create a deeper, more human connection between you and your team, stakeholders or other audiences. It encourages others to listen closely to the content, develop a deeper understanding, better retain a message and/or drive them to a desired action.

When and How This Shows Up at Work

It's important to understand the difference between storytelling and pitching. These are interrelated but ultimately different skill sets, and the decision on which skill to use depends on the desired outcome of an interaction.

As a program lead, you and your employees will use storytelling when the goal is to engage and create connection with an audience. For example, you might tell a short story at the start of a HCD class to connect with the class before you begin teaching.

A great pitch on the other hand will start with a short story to engage an audience; however, the end goal is different. A pitch ends with a specific ask and call to action, for example, an employee might ask local organization leadership to support a new innovation project and provide resources to do so.

Concept created by Gustav Fretag.

Storytelling often follows a construct called the "Storytelling Arc," or "Narrative Arc." When learning to use this, follow the steps in order. As you become more familiar with the process, try using the actions in a different order (e.g., begin with the climax or main action point and then rewind the story for more context) and note the impact on your audience.

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Here is a list of seven different narrative patterns to help define the array of story objectives, content and reactions each could inspire:

If your objective is:	You will need a story that:	In telling it, you will need to:	Your story will inspire such phrases as:
Sparking action (springboard stories)	Describes how a successful change was implemented in the past, but allows listeners to imagine how it might work in their situation.	Avoid excessive detail that will take the audience's mind off its own challenge.	"Just imagine…" "What if…"
Communicating who you are	Provides audience-engaging drama and reveals some strength or vulnerability from your past.	Provide meaningful details but also make sure the audience has the time and inclination to hear your story.	"I didn't know that about him!" "Now I see what she's driving at"
Transmitting values	Feels familiar to the audience and will prompt discussion about the issues raised by the value being promoted.	Use believable (through perhaps hypothetical) characters and situations, and never forget that the story must be consistent with your own actions.	"That's so right!" "Why don't we do that all the time!"
Fostering collaboration	Movingly recounts a situation that listeners have also experienced and that prompts them to share their own stories about the topic.	Ensure that a set agenda doesn't squelch this swapping of stories – and that you have an action plan ready to tap the energy unleashed by this narrative chain reaction.	"That reminds me of the time that I…" "Hey, I've got a story like that."
Taming the grapevine	Highlights, often through the use of gentle humor, some aspect of a rumor that reveals it to be untrue or unreasonable.	Avoid the temptation to be mean-spirited–and be sure that the rumor is indeed false!	"No kidding!" "I'd never thought about it like that before!"
Sharing the knowledge	Focuses on mistakes made and shows, in some detail, how they were corrected, with an explanation of why the solution worked.	Solicit alternative–and possibly better solutions.	"There but for the grace of god…" "Gosh! We'd better watch out for that in the future!"
Leading people into the future	Evokes the future you want to create without providing excessive detail that will only turn out to be wrong.	Be sure of your storytelling skills. (Otherwise, use a story in which the past can serve as a springboard to the future.)	"When do we start?" "Let's do it!"

Source: S. Denning, "Mastering the discipline of business narrative"

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Storytelling

Three Scenarios in Which Storytelling Skills Might Help in Your Role:

| **Connecting with Stakeholders** | At a department's morning huddle you share stories of past successful innovation projects at your organization, allowing others to know you better as a leader, a resource and a colleague. |

| **Creating a Shared Purpose for Change** | While meeting with a new local team you share a personal story about an end user's experience to demonstrate how empathy helped to create an impactful user-centered solution. |

| **Recruiting People into Your Program** | During a quick presentation as part of your organization's monthly town hall you share stories about your organization's programming to encourage staff to get more involved. |

As a program lead supporting employee innovators, you show your value in this area by:

- **Sharing the work of other innovators** through stories and examples that are relatable.

- **Teaching HCD principles and concepts** and utilizing project stories to bring them to life.

- **Recruiting participants by sharing stories** of other innovators or organizations, including their experiences, growth and relationships developed with others, as well as a deeper understanding of how to best make an impact in the lives those you wish to help.

- **(Re)Shaping your organization's perspective** of what might be possible by sharing stories of past and current successes.

- **Creating aspirations for the future** through "imagine if" stories about possibilities for the organization, department or team.

- **Helping team members shape their project stories** from qualitative research, ideas or lessons learned for other strategic collaborators.

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This excerpt from Stephen Denning's 2006 article in Strategy & Leadership "Effective storytelling: Strategic business narrative techniques" illustrates the power of storytelling in health care.

> " Strategic storytelling has also been enlisted to change attitudes and behaviors. Two studies from the health care industry show its power: Penn State College of Medicine researchers found that medical students' attitudes about dementia patients, who are perceived as difficult to treat, improved substantially after students participated in storytelling exercises that made them more sympathetic to their patients' conditions. And a University of Massachusetts Medical School study found that a storytelling approach has also been effective in convincing populations at risk for hypertension to change their behavior and reduce their blood pressure. "

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Storytelling

Skill Levels

Novice

- Identify when storytelling is needed and recognize when it is being used.

- Able to differentiate between a story and a pitch. Understand the need for and desired outcome of each skill.

- Able to refine a story to be told in numerous ways by adjusting elements such as length, details and audience takeaway messages.

- Craft and deliver a memorable story that clearly relays the message you want to share.

- Integrate storytelling into discussions and presentations.

- Able to co-facilitate storytelling workshops with your swim buddy or another Innovation Specialist. At this stage you likely rely on notes to effectively teach the class.

Proficient

- Comfortable adjusting a story to be delivered effectively in in-person, virtual or hybrid settings.

- Bring your story to life by enhancing it with assets or artifacts.

- Able to independently teach Storytelling and Pitching with minimal guidance and understand the desired outcome of the class is to generate interest from local staff who attend this class.

- Possess a "story garden" with a handful of go-to, well-crafted stories that can be used to effectively convey a desired message to an audience.

Expert

- Adjust or create a story "on the fly" adhering to the story spine outline when you believe that a story is needed for an individual or group.

- Confidently able to guide others in the creation of personal stories that can be used for professional or personal development.

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Storytelling

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Tools and Templates That Support This Skill

Articles	Videos	ie⁴ Tool

Articles

The Six Main Arcs in Storytelling Article
by Kurt Vonnegut

Storytelling Is A Must
by Ester Choy

The Power of Storytelling as a Skill in the Health Promotion Field
by Brian Passon

Videos

How to Present Properly
by Simon Sinek

Concise Storytelling for Leaders Workshop
from the Stanford Graduate School of Business

A Life Lesson from a Volunteer Firefighter
by Mark Bezos

Spark Challenge Sessions
about Storytelling in HCD

Tool

iNET's Storytelling for Change Class

2.2 Relationship Building

Relationship building and organizational awareness are closely related skills. Once you have developed a strong understanding of your organization structure and identified the key players who can help your innovation program succeed (organizational awareness), you will need to connect with these individuals, develop lasting professional relationships and know how to leverage connections to get things done.

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Relationship Building

What It Is

Relationship building refers to the skill of actively seeking out and nurturing connections with important stakeholders to build trust and rapport. It involves effective communication, active listening and empathy. Taking the time to understand the needs, motivations and perspectives of others will allow you to tap into a network of valuable resources, insights and support and help drive the success of your innovation projects.

In contrast to organizational awareness, which focuses on understanding internal power structures and dynamics, relationship building specifically addresses the skills needed to develop connections and deeper relationships with these important individuals and teams once they have been identified. By prioritizing relationship building alongside organizational awareness, you will foster an environment conducive to innovation, collaboration and positive transformation.

When and How This Shows Up at Work

When employees approach you with a new idea or a problem, fostering open dialogue and creating a trusting environment promotes effective communication and collaborative problem solving. You will also use these skills when connecting with individuals and work groups during the HCD problem solving process, and when interacting with leadership and key decision-makers to influence and garner support.

Staying aware of evolving internal and external dynamics and consistently building new relationships will be crucial to your success in this role.

> **Relationship building also can help you engage with external partners such as Veteran Service Organizations (VSOs) to align project outcomes with Veteran needs and elicit valuable feedback.**

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Relationship Building

Three Scenarios in Which Relationship Building Skills Might Help in Your Role

Moving Projects Forward	A project team has been unable to secure support from a key department at your organization. You are asked to identify a contact and understand the obstacles to help this project move forward.
Greenhouse Project Support	You hear an exciting Greenhouse pitch on iNET's team call. You reach out to the relevant local service chief, explain the opportunity and obtain support to participate in this project.
Securing Local Funding	After several months of building your organization, you are ready to approach your organization leader and ask for funding to support a local program.

As a program lead supporting employee innovators, you show your value in this area by:

- **Actively cultivating and managing professional relationships** within your organization. Over time, this will create an environment that is conducive to effective communication, idea sharing and collective problem-solving.

- **Establishing trust and creating psychological safety** by building a relationship with each employee to allow them to feel heard, encourage the sharing of ideas and connect with the principles of the HCD process.

- **Developing strong relationships with key stakeholders** and decision makers helps keep projects moving forward. It also will allow you to navigate potential obstacles, increasing the likelihood of obtaining necessary approvals and resources for ongoing innovation projects.

- **Nurturing relationships with teams** and stakeholders to foster an environment that supports creativity, encourages risk-taking and aligns project goals with the broader organizational objectives of an established innovation program.

Relationship Building

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Skill Levels

Novice

- Identify basic stakeholders involved in a given context or project and understand the importance of building relationships with them.

- Build trust and credibility with identified stakeholders through reliability and consistency, honoring commitments and maintaining confidentiality. Seen as trustworthy and dependable by others.

- Communicate effectively, adapting to different stakeholders and situations while demonstrating understanding and empathy.

- Actively engage in collaborative efforts with stakeholders and key members of your organization to achieve common goals and encourage contributions from all team members.

Proficient

- Proactively cultivate relationships with key stakeholders to drive mutual value and achieve shared objectives, demonstrating a deep understanding of stakeholder needs, motivations and goals.

- Employ mediation and negotiation techniques to promote consensus and collaboration, facilitating constructive discussions to find mutually beneficial resolutions when conflicts arise between professional connections.

- Leverage relationships to drive positive change and adoption of innovative solutions, using influence and persuasion strategies to gain support.

Expert

- Maintain an extensive network of relationships with key stakeholders across the organization and easily facilitate connections and synergies among stakeholders for broader impact.

- Continually conduct stakeholder analysis to identify new key stakeholders and understand their role in the system, demonstrating a comprehensive understanding of the broader system in which stakeholders operate.

- Navigate cultural differences and engage in global collaboration, leveraging the strengths of stakeholders from different backgrounds.

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Tools and Templates That Support This Skill

Articles

Building Good Work Relationships
by Mind Tools

How Can You Build Relationships
with People Outside Your
Department More Effectively

How To Build Professional
Relationships: A Step by
Step Guide
by Lenny LaCour

Download the checklist for this competency here

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2.3 Coaching

Program leads with mature innovation programs often manage multiple innovation projects at the same time. To maximize the learning potential for employees, program leads take on the role of a coach. It's important to clarify that as a program lead your role isn't that of a team member on projects. Instead, as a coach, you provide valuable wisdom and guidance to nurture the growth of individuals and teams. You will serve as a developer of these teams, helping them harness their relationships, shared experiences and interpersonal awareness to support their goals and manage their projects effectively.

Coaching

What It Is

Coaching is a means of training, instructing or counseling with the goal of helping an individual or group improve their performance, achieve success and overcome challenges. Coaching is not a series of tasks; rather, it is a partnership between a coach and an individual or team that is centered around articulated goals, actions or needs.

You might be wondering how coaching is different than mentoring. Coaching relates more directly to an individual's or team's work on a specific project instead of on their own personal or professional goals. While a mentor might spend time during regular meetings getting to know a mentee's own goals and needs and how to address them, a coach's work is focused more on the team's or individual's progress on their project work. Mentoring is a more advanced skill and shows up later in this Playbook.

When and How This Shows Up at Work

Coaching in this role will be centered primarily on helping innovation project teams achieve their project goals and reach their full potential. There are many times teams and individuals will be told "no" or won't see a clear pathway for their progress. That's when coaching and many of the other skills covered in this Playbook become valuable in helping employees stay motivated while they tackle these roadblocks and turn a "no" into a "yes."

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Coaching

Three Scenarios in Which Coaching Skills Might Help in Your Role

Overcoming Obstacles	An employee becomes discouraged when they are told "no" due to a lack support for what they want to do. You help coach them through a meeting to overcome this challenge.
Applying New Knowledge	An employee tells you they feel overwhelmed after attending a recent planning session. You help them balance competing demands and on-the-job priorities with their innovation project work.
Leading Greenhouse Projects	A Greenhouse project entrepreneur has never used HCD prior to engaging with iNET. You help them see the value of VA employee and Veteran feedback and coach them through iterative project improvements.

As a program lead supporting employee innovators, you show your value in this area by:

- **Helping them apply innovation competencies.** Employees might learn the theory of HCD, but the lessons they learn may not feel real until they start to apply them in their work. As they gain this real-world experience, you will help them translate what they hear and see into what they do.

- **Turning a "No" into a "Yes."** This can feel daunting since teams will likely be denied many times as they try to do things differently. As a coach, you'll help them figure out different or new ways to do things and educate the nay-sayers to bring them on board, too.

- **Forging relationships between teams and potential supporters and stakeholders.** "Getting stuff done" is not just about checking off to-dos. Relationships make the world go round and help the work get done. You will be invaluable in forging the right relationships for employees and their innovative teams to accomplish their goals whether with experts, influencers, decision makers or funders.

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Coaching

Skill Levels

Novice

- Explain the difference between coaching and mentoring.

- Apply coaching principles to help innovation project teams achieve their project goals and overcome challenges, effectively guiding them through obstacles.

- Analyze specific scenarios that might be encountered as a program lead and assess when coaching skills should be applied.

Proficient

- Demonstrate the ability to adapt coaching techniques to various situations within the field of innovation, including with iNET teams and Greenhouse projects.

- Successfully coach employees working on diverse innovation projects at the same time. Able to guide them to desired outcomes and ensure milestones are met.

Expert

- Independently develop and continually refine your own advanced coaching strategies and apply them with employees.

- Successfully lead Greenhouse projects, ensuring that employee and Veteran feedback are incorporated into subsequent prototype iterations and helping entrepreneurs see and appreciate the value of feedback provided. Doing so within established timelines as outlined in the Cooperative Research and Development Agreement (CRADA).

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Coaching

Tools and Templates That Support This Skill

Articles

Videos

Forbes: Why (Most) Business Coaching is a
Waste of Time
by Clay Clark

HBR: Most Managers Don't Know How to
Coach People. But They Can Learn
by Julia Milner and Trenton Milner

CMOE: 10 Effective Coaching Strategies to
Drive Team Success

Elizabeth Lyle: TED Video

Atul Gawande: Want to Get Great at
Something? Get a Coach

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2.4 Finance

One of the first things people assume when they think about innovation is access to money: innovation requires a large budget. This is not true. While implementing innovative programs, changing system-wide processes and purchasing new innovative products requires a financial investment; innovating does not.

iNET is built to be low cost, so we can support risk. Early-stage innovation should be about learning and iterating, so that mistakes can be made and failure can be easily digested. However, you will still need funding to support your innovation program.

The VA receives money every year from the United States Congress, some of which makes its way to iNET to fund projects and team trainings. Spending government money can be challenging; however, as an Innovation Specialist, your project teams will rely on your financial expertise to pay for what they need to keep their projects moving forward.

Learning the ins and outs of government finance takes time and draws upon many other skills covered in this Playbook. Be patient, ask questions and review this section often. In time you'll find you can confidently navigate this nuanced area of knowledge.

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Finance

What It Is

Your program will need to fund the project, or prototype, needs of your employee innovators. In addition, you will spend significant resources on culture building activities, such as travel and events. Every organization's financial system and funding mechanisms are unique. Your Chief Financial Officer (CFO) should be consulted and collaborated with as you develop your program to align financial processes and goals with that of the organization.

Check with the finance experts at your organization for tools, templates, and references to support this skill.

What's important for you to know is that VHA funding comes from different sources and different type of funds exist for different needs. Our budget allocation changes each year and funds do not carry over from one year to the next. The government's funding cycle runs from October 1st to September 30th and does not follow a normal calendar year.

VA teammates, learn more about how this shows up at work, and how this knowledge may be useful in your role

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Finance

Skill Levels

Novice

- Establish a working relationship with your local finance team, understand the roles and responsibilities of different members of the team and know how to seek assistance when needed.

- Effectively manage funds allocated for specific projects. This includes working closely with the finance team to ensure funds are placed in the appropriate accounts, overseeing access for team members and making sure the funds are utilized in a cost-effective manner.

- Able to meet deadlines and create spend plans to ensure funds remain available until they are needed. This includes promptly providing spend plans to the finance team, listing required items and associated time frames and ensuring the allocated funds are utilized as intended.

- Demonstrate an understanding of the different purposes and uses of FCPs, including knowledge of specific FCPs for Spark-Seed-Spread project support and allocated travel funding.

Proficient

- Independently oversee the allocation and management of funds received for projects, ensuring proper placement into designated fund control points (FCPs) and granting access to team members for making project-related purchases.

- Regularly interact with the finance team to understand spending deadlines, coordinating with them for project fund management and seeking their guidance and support when required.

Expert

- Able to make informed decisions about project funding, prioritize projects based on potential impact, optimize resource allocation and ensure funds are utilized effectively and efficiently.

- Mentor and assist colleagues or team members in understanding and navigating VHA finance processes, provide expert advice on financial matters and ensure compliance with finance regulations and policies.

Download the checklist for this competency here

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2.5 Purchasing

Similarly to the previous finance competency, purchasing and ordering supplies, materials and services within every organization is different. Unable to provide details into how your organization makes purchases, this Playbook will outline when and what purchases you might need to make to support the mission of your innovation program.

Making purchases in VHA can feel overwhelming. You will have to use many of your other skills to be successful in this area, and even then things may move slowly at times. This competency provides the knowledge and tools you will need to succeed and ensure you are able to help each investee move forward with their innovation projects in a timely manner.

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Purchasing

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What It Is

Purchasing is the acquisition of the goods and services necessary to support your innovation program. You may also hear the purchasing department referred to as logistics, acquisitions or supply chain management.

When and How This Shows Up at Work

Program leads will follow organizational guidelines to secure the necessary materials required to build prototypes and obtain other items to support project and programmatic needs. Occasionally, you may need help creating contracts for larger purchases or need to engage experts that can assist with complex prototype development. The timely arrival of the needed materials is essential and requires a strong working relationship with stakeholders adept at purchasing these materials.

Scenarios in Which Knowledge of Your Organization's Purchasing Process Might Help in Your Role

Prototype Creation	A project requires the creation of a physical prototype, and the employee needs your help procuring the necessary materials and resources to build a rough mock-up of their idea.
Purchasing Promotional Materials	You would like to give away promotional items at an upcoming innovation fair and need help identifying an appropriate vendor to complete this request.

Check with the purchasing experts at your organization for tools, templates, and references to support this skill.

VA teammates, learn more about purchasing, how this shows up at work, and how this knowledge may be useful in your role

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Purchasing

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Skill Levels

Novice

- Recognize the different financial and purchasing documentation, such as invoices, purchase orders and 2237s, and understand their basic functions and importance.

- Identify key points of contact in your organization's purchasing process and understand their roles in the procuring what you will need for your program.

- Effectively manage and monitor FCP balances, including checking available funds, understanding spending time frames and initiating purchases in a timely manner to avoid fund transfers or "sweeps."

- Recognize the roles and responsibilities of a purchase card holder and establish effective working relationships with them, ensuring the ability to make purchases for innovation programs.

Proficient

- Demonstrate proficiency in managing FCP ownership, including understanding the process of assigning purchase card holders and purchasing team members to specific roles and successfully navigating FCP ownership changes.

- Effectively utilize relevant purchasing tools and systems, such as Strategic Equipment Planning Guide (SEPG) and Enterprise Equipment Request (EER), for initiating equipment purchases, tracking requests and facilitating the review and approval process.

- Complete purchases for your innovation program per your organizational process with little assistance.

Expert

- Demonstrate advanced proficiency in managing FCP ownership, including independently executing designation of authority processes and effectively working with local points of contact for necessary forms and approvals.

- Complete purchases for your innovation program, per your organizational process and be a mentor for others within your organization as they navigate procurements and purchasing.

- Exhibit expertise in using purchase cards, including understanding spending thresholds and limitations, creating purchase orders, reconciling invoices and coordinating with the contracting team for high-value purchases.

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2.6 Public Speaking

Public speaking is speaking in front of a live audience of varying sizes, whether that audience is in-person, virtual, or hybrid, and is a cornerstone of leadership. However, if the thought of public speaking makes you a little uneasy, you are not alone. Mark Twain said it well: "There are two types of speakers; those that are nervous, and those that are liars."

This module will address several techniques to help you embrace public speaking and build the skills to make you a more competent, confident and impactful public speaker.

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Public Speaking

What It Is

Public speaking is a skill aimed at conveying information or messages to a passive audience. It is one-way communication where the speaker, often well-prepared and focused on their message, delivers information to a group of listeners. The primary goal is to inform, persuade, motivate, entertain or inspire. The audience is meant to absorb the content as the speaker takes center stage.

Public speaking is a distinctly different skill from facilitation. A facilitator is neither in the spotlight nor the center of attention. Instead, they guide the discussion, encourage interaction and foster collaboration. Facilitation is about two-way communication with participants actively engaging in the conversation. A facilitated interaction is a participant-centered approach where the facilitator adapts to the group's needs, making real time adjustments to ensure predetermined objectives are met. If you are on stage in front of a large group of people, you are using public speaking skills.

When and How This Shows Up at Work

Public speaking is a critical skill for those looking to effect change. You may be surprised at the diversity of audiences you will connect with in this role: community partners, large and small business leaders, local citizens, prospective innovation end users, members of Congress and more. Public speaking skills will be needed when you present at town halls, staff meetings, innovation conferences and in other public settings across your organization.

You will have to assess the purpose and desired outcome of the many meetings you'll host and decide whether a public speaking or facilitating skill set is best suited for the situation.

Both public speaking and facilitation skills are essential to your success as a program leader.

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Public Speaking

FEELING NERVOUS?

Here are some basic steps you can take to begin to calm your fear and beef up your public speaking skills:

- Know your topic. The better you understand your topic, the less likely you will be to get off track. This will also help you recover more quickly if or when surprises come up.

- Get organized. Plan out what you want to present, including visuals, audio, props and even your body placement—think about how and where you might walk, stand or sit.

- Practice, practice, practice. We don't mean just think through it—actually practice it out loud. Consider recording an audio clip or video of yourself, depending on the format of presentation, to play back and listen/watch as you prepare. Trying it out in front of family, friends or colleagues is also a great way to practice.

- Do some deep breathing. Box breathing is a technique that is very helpful to relax and calm the mind.

- Visualize and celebrate your success. Imagine it going well; see it in your mind. After your presentation is complete, celebrate that you did it! Each delivery of your presentation builds up your skills even more.

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Public Speaking

Three Scenarios in Which Public Speaking Skills Might Help in Your Role

Selling Your Innovation Program	You are invited to an employee team meeting to share information about the need for and impact of a new innovation program with a goal of recruiting new participants and supporters.
Speaking to a Large Audience	A national program office reaches out asking you to speak to their team about HCD and other innovation programs to expose their staff to new ways of creating and interest them in the learning journey.
Representing VHA to Outside Audiences	You are asked to speak at a local Veteran Service Organization (VSO) meeting. Attendees want to learn about VHA's innovation efforts and the exciting new products and programs available to them.

As a program lead supporting employees, you show your value in this area by:

- **Speaking at various events** to recruit people and teach them about your program.

- **Training and teaching** a wide array of topics. When we teach others about our skills, we are inviting them to engage and consider what might be possible for their own development.

- **Delivering presentations about the program** to other leaders or external audiences to give them a sense of what it is and what's possible.

- **Being able to communicate your passion and enthusiasm** about your program or organization. This is just as important as sharing your book knowledge. An Innovation Specialist from Orlando once called it, "selling the sizzle."

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Public Speaking

Skill Levels

Novice

- Recognize the differences between a good public speaker and a good facilitator.

- Maintain eye contact with members of your audience when speaking.

- Speak without reading or an over-reliance on notes.

- Speak at a moderate pace and avoid "filler words" (e.g., and, umm, so).

- Deliver a meaningful and memorable presentation that clearly gets across the main points and objectives you set out to share.

- Engage effective storytelling as a part of your presentation.

- Comfortable receiving and incorporating feedback as you work to develop your own speaking style.

Proficient

- Create strong presentations or other visual assets that support your desired message. Able to do this independently but also see the value in asking other subject matter experts for their input and feedback.

- Use silence to create drama, focus or excitement in public speaking.

- Tailor the content of presentations to fit different audiences.

- Create genuine rapport between you and the audience that helps you stand out from other speakers.

- Maintain an engaging and calm demeanor in front of large audiences.

Expert

- Incorporate humor into your speaking engagement.

- Use body placement and motions to engage and communicate, even in virtual settings.

- Handle difficult questions in front of a live audience.

- Deliver impromptu speeches effectively and with ease.

- Speak confidently as a keynote at external conferences.

Public Speaking

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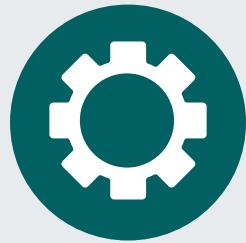
Tools and Templates That Support This Skill

Articles	Tool	Organization	Videos

Articles

How to Nail a Hybrid Presentation
by Sarah Gershman and Rae Ringel

Fear of Public Speaking: How Can I Overcome It?
by Craig N. Sawchuk

Tool

Activities for Public Speaking

Organization

Toastmasters

Videos

TED Talk: Chris Anderson

How to Work the Stage Like a Pro
with Vanessa Van Edwards

4 Tips to Improve Your Public Speaking
with Simon Sinek and Isaac Serwanga

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2.7 Rapid Prototyping

Rapid prototyping is a strategy that involves quickly making and tweaking models to explore different design ideas. iNET embraces this methodology because it saves time and money and can help avoid huge design mistakes later in the HCD process. Most employees who reach out to you will expect perfect results right away or will propose solutions that do not necessarily solve an identified problem.

It will be your job as a program lead to help them see the value of starting slowly, talking to stakeholders, incorporating feedback into their design ideas and creating basic prototypes to physically demonstrate their idea. iNET's mantra reflects these mindsets: Start small, fail small, learn fast.

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Rapid Prototyping

What It Is

A prototype is the connection between the abstract ideas generated during the discovery phase of an HCD project and the creation of a physical artifact end users can interact with. Rapid prototyping refers to the process of quickly creating and iterating on a prototype with an emphasis on speed and efficiency, allowing for the exploration of multiple design possibilities and variations in a relatively short amount of time.

iNET practices rapid prototyping because it allows for the quick refinement and improvement of designs, avoiding costly mistakes and reducing time spent developing solutions that may not meet end user needs. It is accomplished using materials such as paper, cardboard, pipe cleaners and Play-Doh and allows project teams to quickly create low-cost prototypes with low fidelity. It will be important that employees who participate in your innovation program have access to the skills, resources and knowledge needed to build a prototype.

When and How This Shows Up at Work

Utilizing HCD in your innovation program's projects inevitably will require the creation and refinement of a prototype.

Creating a culture of learning based on the experience of rapid prototyping encourages investees to embrace end user feedback, value iterative improvements and identify and refine innovative solutions that better serve the needs of the people in your organization.

Rapid prototyping in HCD faces challenges as it conflicts with the desire expressed by many employees for a fully finalized solution from the start. Perfectionism, time and resource constraints, risk aversion and unrealistic expectations are common hurdles you will face as a program lead. Overcoming these challenges involves educating your employees about the value of receiving feedback and helping them learn to accept imperfections and embrace iterations to create solutions that truly meet your organization's needs.

> **Projects at the Spark investment level will create a prototype near the end of the Accelerator cycle. A prototype is required to advance to the Seed level of support. Project prototypes at the Seed investment level often undergo multiple iterations as the goal of this phase is end user feedback and continued prototype modification.**

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Rapid Prototyping

Three Scenarios in Which Rapid Prototyping Skills Might Help in Your Role

Developing an Innovative New Idea	An employee reaches out seeking to build an expensive new device. You explain the concept of rapid prototyping and help them create a low-fidelity representation of their idea.
Obtaining Stakeholder Engagement	An employee has completed their first low-fidelity prototype. The team hopes to meet with several end users and receive valuable feedback on the first iteration of their idea.
Creating User-Centered Solutions	An employee creates multiple iterations of a prototype. Feedback allows them to quickly refine their product's features and overall effectiveness, resulting in a more user-centered design.

As a program lead supporting innovation, you show your value in this area by:

- **Guiding employees through the rapid prototyping process,** educating them about the importance of prototyping and iteration and teaching them the skills needed to create their prototype.

- **Addressing common concerns,** including the desire for a fully finalized product and the fear that they may lack the creative skills needed to create a prototype. Doing so will encourage employees to value end user feedback and embrace iterative improvements as they move further into the HCD process.

- **Encouraging employees to use rapid prototyping techniques** will help them gather feedback and quickly iterate on their designs. Innovation projects typically require multiple prototype iterations as they incorporate feedback from end users.

- **Creating a culture of learning** that embraces imperfections to encourage employees to value end user input and create programs and products that ultimately meet the needs and preferences of your organization's end users.

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Skill Levels

Novice

- Demonstrate a basic understanding of rapid prototyping principles and their importance in the innovation process.
- Assist investees in creating simple prototypes as part of iNET's "Playing with Prototypes" class.
- Explain the concept of iteration and guide individuals through the initial stages of prototype development.
- Possess a solid grasp of rapid prototyping techniques and their application in HCD.
- Guide employees in creating prototypes with medium fidelity, facilitating feedback sessions and encouraging iterative improvements.
- Address common challenges, such as managing expectations and promoting the value of end user feedback.
- Scope and build low-fidelity prototypes for testing.

Proficient

- Demonstrate advanced knowledge and expertise in rapid prototyping methodologies.
- Be adept at assisting employees in multiple iterations of their prototypes, managing stakeholder engagement and facilitating user-centered design processes.
- Identify areas for improvement and guide employees through complex prototyping challenges to refine their designs effectively.
- Conduct rapid prototype tests to gauge the value and viability of multiple ideas. Able to guide employees to refine prototype ideas through testing.

Expert

- Demonstrate mastery in rapid prototyping and possess an in-depth understanding of various prototyping techniques, materials and tools.
- Provide nuanced guidance, foster a culture of learning and iteration and empower employees to create high-fidelity prototypes that effectively incorporate end user feedback.
- Possess the expertise to address advanced prototyping challenges, drive innovation and ensure the final solutions meet the needs of your end users.

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Tools and Templates That Support This Skill

Articles

Tools

Video

Book

Articles

The Secret Power of
Prototyping
*by Steve Schwall and
Alicia Duvall*

What Cooking Dinner for
Friends Taught Me About
Prototyping
*by Nicki Schäfer and
Khyati Trehan*

LEGO – Design Sprints at Scale
by Jonathan Courtney

Prototyping: A Guide to the 4th
Stage of Design Thinking
by Bryan Kitch

Tools

4 Warm-Ups to Prime Your Team
for Decision-Making

Practice Your Prototyping Skills
With These 4 Resources

ie⁴ Playing with Prototypes

Video

Make Your Ideas Tangible
Through Prototypes
with David Kelley

Book

The Sprint Book
by Jake Knapp

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2.8 Community Engagement

A community, in the simplest terms, is a group of people who have similar interests and team up to work towards a common goal. iNET's community is made up of passionate employees united in their goal to solve problems and create the best possible health care experience for the Veterans we serve.

A strong innovation community provides a pipeline for new potential projects. It helps you find and connect with engaged employees at your organization and build a grassroots network of motivated and excited staff who advocate for your program, further enhancing your opportunities for success.

Community Engagement

What It Is

An innovation community is a cohesive and collaborative group of individuals within an organization who share a common interest in innovating and driving positive change. This community serves as a platform for employees to come together, exchange ideas and contribute to the organization's innovation efforts to achieve shared goals and objectives.

In the context of your innovation program, you will play a vital role in creating and nurturing a community of engaged employees at your organization and beyond. To build their community, iNET's Innovation Specialists host a variety of activities and initiatives that encourage involvement and participation in innovation programming. These activities may involve both internal and external stakeholders. Over time, these efforts create an environment where employees feel empowered to identify problems, experiment with different approaches and take risks without fear of judgment as they work to solve our biggest challenges.

When and How This Shows Up at Work

As a program lead, constructing an internal innovation community will be an important part of your daily work that builds upon earlier competencies covered in this Playbook. Your goal should be to create a thriving community where employees engage and contribute during regular events, workshops and educational classes. To do so you will apply your knowledge of innovation fundamental teachings, use your facilitation skills to engage and inspire, and draw upon your knowledge of innovation microclimates (covered in the Leadership competency) to build your community one employee at a time.

Creating an innovation community will foster a culture of open communication and creativity and create a pathway for employees to share problems directly with you to discuss and explore. In turn, you will provide access to resources, support and connections with internal stakeholders and external networks, acting as a catalyst for Box 3 thinking. With your guidance, your local innovation community will become a thriving hub of ideas and collaboration, driving your program's success.

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Community Engagement

In addition to building a thriving internal community, you will want to recruit external collaborators into your innovation program as well. iNET does this primarily through the Greenhouse Initiative. The Greenhouse is an opportunity for the health care innovation community to work with iNET sites throughout the country at the earliest stages of innovation. Entrepreneurs, industry, and academia can collaborate with VA employees and Veterans to frame problems, discover more about end users and test innovative solutions.

Who might your organization collaborate with to meet your program's needs and build a community?

As a program lead supporting external community, you show your value in this area by:

- **Engaging effectively with external stakeholders** to potentially realize several key benefits, including access to end users and successful collaborations with participants.

- **Tapping into a larger network of experience** to ensure that unique perspectives, needs and experiences are incorporated into innovation projects by actively engaging with external stakeholders beyond the walls of your organization.

- **Looking to your internal innovation community stakeholders** to identify potential project participants who can contribute to and help shape innovations being developed by the external health care innovation community. Engaging both internal and external stakeholders in your community building efforts ensures a diverse range of perspectives and expertise.

> **Engaging with VSOs and sharing information regarding new innovations helps connect Veterans with the cutting-edge products and programs we are developing in iNET. Use the VSO toolkit in the Tools, Templates, and References section of this competency to learn more about how you can reach out and begin developing relationships with your local VSOs.**

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Community Engagement

Skill Levels

Novice

- Demonstrate an understanding of the principles and benefits of community engagement for innovation.

- Facilitate community-building initiatives, such as workshops and innovation challenges, seek feedback from stakeholders and incorporate suggestions into engagement strategies.

- Actively seek out opportunities to engage with external stakeholders and involve them in innovation projects to gather valuable input and feedback.

Proficient

- Successfully foster a collaborative and inclusive environment within the innovation community at your local organization and take the initiative to organize and lead community-building events and workshops.

- Cultivate strong relationships with external partners to enhance collaboration and knowledge-sharing, and lead efforts to involve external stakeholders in the innovation process, tailoring solutions to meet their unique needs.

Expert

- Nurture a thriving internal innovation community, fostering a culture of creativity and risk-taking.

- Demonstrate exceptional skills in leveraging relationships with internal and external stakeholders to support innovators and projects.

- Guide others in effectively engaging with external stakeholders and understanding their importance in innovation initiatives.

Community Engagement

Tools That Support This Skill

ie⁴ **Tools**

Community Engagement Checklist

VSO Toolkit

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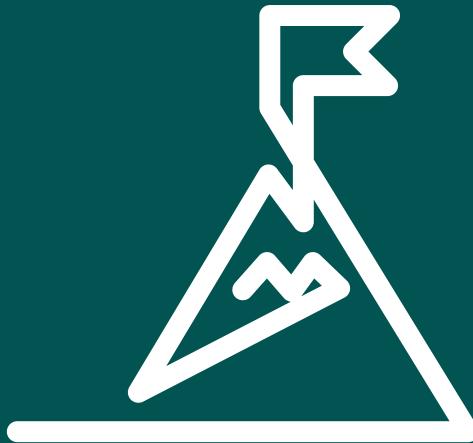
Level Three Competencies:

Mastery

3.1 Leadership

3.2 Intellectual Property

3.3 Change Agency

3.4 Contracting

3.5 UX Testing

3.6 Mentorship

3.1 Leadership

We lead in many areas of our lives: our children's upbringing, community and volunteer efforts, faith-based programs, end of life experiences and many more. Grace, love and bravery are a part of all of these. That is no different in VHA. Leadership focuses on motivating the workforce toward a common purpose and boldly clearing the path for innovative changes that better serve our Veterans, their families, caregivers and VHA employees.

> " Not everybody can be famous, but everybody can be great because greatness is determined by service…You only need a heart full of grace and a soul generated by love. "
>
> —*Martin Luther King Jr.*

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What It Is

Leadership is the ability to guide others toward the achievement of a common goal. Leadership strategies provide a foundation and a few key frameworks for program leads to ground their thinking and create a shared language. These frameworks are research-based and allow some flexibility both for situational context, as well as for your own authentic leadership voice. This competency will provide a high-level view of three important frameworks, and the resource links provided will enable you to go deeper into these concepts as well as other related leadership topics.

When and How This Shows Up at Work

Innovation does not happen in a silo. It is a team effort involving multiple stakeholders at both the local and national level. As you grow and develop as a program lead, you will use the leadership skills identified in this section to enable collaboration between these stakeholders and drive innovation projects forward. Understanding the different leadership styles and knowing which is necessary in a given situation will put you in the best position to succeed.

As you read through this competency, think especially about the power dynamics you have experienced so far with employees and which type of power will help them grow, develop professionally and thrive with their innovation goals. Notice that almost every competency identified thus far, including teaching and facilitating classes, identifying and connecting with key stakeholders, and supporting staff with innovative ideas, help accomplish the goal of developing and supporting an innovation microclimate.

Leadership skills take time and effort to develop. As you grow into a program leader at your organization, you'll find there is no skill more important than that of being an effective leader.

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Leadership

We Will Explore Three Key Areas of Leadership:

Power	Power dynamics, including power over, power to/with, and power within. (VeneKlasen and Miller, 2002)
Leadership Styles	Six leadership styles to help you frame how you or others are leading, and to determine when certain types of leadership may be most effective. (Goleman, 2000)
Microclimates for Innovation	How informal or formal leaders can create Microclimates for Innovation even when the overall organizational culture may be more calcified or risk averse. (Zuber, 2016)

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Power

Power is not fundamentally good or bad; the important aspect about power is how it is used. Four specific types of power are highlighted from the research of VeneKlasen and Miller (2007):

Power over: This is what our minds often go to when we think about power. It implies that one person/entity has power, and most likely the other does not—or at least does not have a good ability or understanding of how to enact their power. The motivation for action is largely accomplished through fear and, for those without the power, often elicits the instinct to resist or rebel.

Power to: When individuals or teams take their power and move to create an impact, they are using their "power to…" make a difference, make a change, etc.

Power with: This is shared power that springs from collaboration and connection. "Empowerment" is a term that embodies this type of power and can lead to strong teams who trust each other and can do more together than any one of them could do alone.

Power within: This power is most closely aligned with self-confidence and a belief that you can make a difference. It is a person's own sense of agency and capability.

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It is important for you as a program lead to recognize and understand these types of power as you work across teams and situations in your organizational system. What type of power do you have? What type of power do you want to create? Here are some specific attributes of each power type. Circle those you feel you most closely align with.

POWER OVER	POWER TO/POWER WITH	POWER WITHIN
Use coercion to drive performance	You share power by trusting and empowering	Feel comfortable sharing power
Perfectionism (what and how you ensure your perfectionism needs are met by the team)	You foster an environment of trust and accountability	Pursuit of excellence — you know when things are good enough
You are a knower: Owner of the truth —"I am right you are wrong. Period."	You give positive and constructive feedback	Accepts mistakes and corrects them
Blaming others	Let's find the solution mindset	Voices questions and concerns
Using shame and fear to manage performance	You foster a climate of respect, trust and openness	Asks for positive and constructive feedback
Criticizing publicly	People feel safe and free to voice questions and concerns	Being a learner and a work in progress
Uses KPI to compare and punish	Uses KPI to improve performance	You are accountable to your commitments
Tone and volume can be laced with anger and frustration	Clarifies and validates alignment	Source of calm in stormy weather
Fighting every fight	Stays grounded and listens effectively to opposing views	Confident in capabilities
Punishes others for mistakes or failures	Recognizes and praises good performance	Asks for help

VeneKlasen, L. and Miller, V., 2002. Power and empowerment. PLA notes, 43, pp. 39–41.

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Use this area to map out how each of the four power dynamics might show up during your work efforts in your role as a program lead. Come back to this often as you progress and learn. Continue to look for ways to shift away from a 'power over' mentality.

How do these show up...	Power Over Power is a one way relationship. One side has power and acts in ways to maintain that power.	Power To Every person or group has the potential to make change. This can open up possibilities for individuals and groups to unite.	Power With A group of people with a common goal. All support and work together to make it happen.	Power Within A person's belief in themselves to imagine that change can happen, and seeing yourself as part of the solution.
in my organization				

VeneKlasen and Miller (2002); Just Associates (2007).

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Leadership Styles

While we each may have our own dominant leadership style, most people find they can change or adjust based on the situation at hand. This requires some awareness and practice, but as a program lead, you will find that the breadth of situations and people you will be working with will contribute to your ability to continue to grow and evolve your leadership styles. The leadership styles in Daniel Goleman's work provide useful examples as a framework for your own reflection and development. Which do you feel you align with now based on your past career experience? Which do you feel would be the most beneficial to your success?

	Commanding	Visionary	Affiliative	Democratic	Pacesetting	Coaching
The Leader's Modus Operandi	Demands immediate compliance	Mobilizes people toward a vision	Creates harmony and builds emotional bonds	Forges consensus through participation	Sets high standards for performance	Develops people for the future
The Style in a Phrase	"Do what I tell you"	"Come with me"	"People come first"	"What do you think?"	"Do as I do, now"	"Try this"
Underlying Emotional Intelligence Competencies	Drive to achieve, initiative, self-control	Self-confidence, empathy, change, catalyst	Empathy, building relationships, communication	Collaboration, team leadership, communication	Conscientiousness, drive to achieve, initiative	Developing others, empathy, self-awareness
When the Style Works Best	In a crisis, to kick start a turnaround, or with problem employees	When changes require a new vision, or when a clear direction is needed	To heal rifts in a team or to motivate people during stressful circumstances	To build buy-in or consensus, or to get input from valuable employees	To get quick results from a highly motivated and competent team	To help an employee improve performance or develop long-term strengths
Overall Impact on Climate	Negative	Most strongly positive	Positive	Positive	Negative	Positive

Goleman, Daniel, Leadership that Gets Results, Harvard Business Review, March–April 2000, pp. 82–83.

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Microclimates for Innovation

Most of us do not, and likely will never, work in an organization that has a pervasive culture of innovation uniformly represented across all areas and functions. It is more likely that we will need to learn how to create conditions for innovation to exist in the part of the organization where we have some influence and the ability to do so. The model for Microclimates for Innovation (Zuber, 2016) was based on research about how organization leaders, both formal and informal, created pockets of innovative conditions referred to as "climates" within a larger culture that was more calcified or risk averse.

Key Attributes of Microclimates for Innovation:

- Innovation was always led and nurtured by a change agent who didn't act alone. They had one or many partners in crime. It was found that working alone led to burnout, and there was a strength and renewal in working with others within the organization.

- They had been afforded some protection, or "air cover," by one or more people in their organization who provided one or more of the following: time to be more innovative, the permission or grace to behave differently, resources such as time or people support, connections to others, or skill building. The supportive person could be their direct supervisor/manager but did not need to be. It just needed to be someone who had more substantial authority or power in their work environment to be able to provide protection from the pervasive culture.

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In addition, successful leaders/change agents for innovation demonstrate a few key behaviors and conditions that are hallmarks of a thriving Microclimate for Innovation. They can be seen in the model below:

Microclimate Model

Overarching combination of advocate support and protection along with enabling conditions and change agent behaviors. Together they create the ability for HCD to flourish in a group of people, despite it not being a predominant culture of the broader organization.

Advocate Support and Protection

Conditions

PARTNER   CHANGE AGENT

Behaviors

Conditions

ADVOCATE
Leverage support for time, resources and protection to work differently than predominant organizational culture.

PARTNER
Have a partner for emotional support and to work with.

PLAY
Create a playful and trusting workplace for contributors.

CAPACITY BUILDING
Begin with small low-risk projects and build up as desired skills, mindsets and behaviors increase.

Behaviors

CONNECTING
Display deep curiosity and commitment to people.

IMPROVISING
Mix together methods of design with methods for change, lean and others when needed.

STORYTELLING
Share experiences and work verbally and visually.

SCAFFOLDING
Offer up ideas and examples to start and refine the work.

Zuber, C. & Moody, L. 2016, "Learning from the Best: Unpacking the Journey of Organizational Design Thinking Leaders," Paper presented at 20th International Design Management Research Conference, Boston, United States.

As an innovation catalyst, you may be the "change agent" in some instances, and in other instances you may serve as the advocate providing support and protection for other change agents. Understanding this model and its components can provide a better understanding about how to create pockets of innovation in a larger system for yourself and for others instead of waiting for the widespread culture to change. Lead the change from where you stand in the existing system. Over time, these Microclimates can become more numerous and pervasive, and even shift the culture more broadly for everyone.

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Three Scenarios in Which Leadership Skills Might Help in Your Role

Supporting an Employee	A new employee comes to you confused and frustrated about how hard it is to get their peers to support their work in their innovation program and asks for your help.
Leading an Innovation Strategy	You have helped develop an innovation strategy in your organization, but it seems to be stalling. You think about which Leadership Style can help you shape your approach to leading those around you.
Increasing Diversity and Involvement	You notice that the same people are always being recognized, rewarded and celebrated for their innovation work locally. How can you create approaches to shift or shape the power where needed?

As a program lead supporting employee innovators, you show your value in this area by:

- **Creating an innovation strategy** at your local organization and using influence and relationships to bring it to life.

- **Modeling a human-centered approach** to the development of new programs.

- **Supporting the team** through the emotional roller coaster of failure. Coach people about the necessity of failure as a path to innovation and to continuous learning.

- **Creating a Microclimate for Innovation** where employees can learn and take risks as they apply the skill sets and mindsets taught in the program.

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Skill Levels

Novice

- Develop a point of view and your own definition of what makes a good vs. a bad leader.
- Listen actively, practice curiosity, and ask good questions.
- Delegate activities and responsibilities to others; do not micromanage.
- Know how to use the tools in this competency to create a shared purpose.
- Guide and develop other team members through active mentoring and/or coaching.

Proficient

- Understand and practice what it means to be a vulnerable and empathetic leader.
- Develop shared accountability as a way of working.
- Develop high performing teams as well as a "teams of teams."
- Create one or many Microclimates for Innovation.
- Develop and maintain trust as a leader.

Expert

- Exhibit emotional intelligence even when times are difficult.
- Initiate bold/fierce/difficult conversations and skillfully hold the space for those discussions when initiated by others.
- Guide other team members on how to create Microclimates for Innovation within their area of influence.

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Tools and Templates That Support This Skill

Articles

Tool

Videos

Book

Articles

Parenting Manifesto
by Brene Brown

Seven Powerful Lessons for Building a Thriving Team of Innovators
by Christi Zuber

Leadership That Gets Results
by Daniel Goleman

Frameworks for Leading Front-line Innovation in Health Care: Failure Microclimates and Leadership
by Christi Zuber and Dan Weberg

Tool

Network Secrets of Great Change Agents

Videos

Leadership Lessons
from Simon Sinek

Creating a Millennial Training Program
from Simon Sinek

What Makes a Great Leader
with Linda A. Hill

Book

Fierce Conversations: Achieving Success at Work and Life in One Conversation
by Susan Scott

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3.2 Intellectual Property

Intellectual property (IP) is an important component of innovation. A patent is a legal tool that helps protect an inventor's idea. Knowing the landscape of your organization's legal system and who can help you in this area is critically important to your program.

Obtaining a patent is both time consuming and expensive, but VA has a program dedicated to helping employees with innovative new ideas navigate the patenting process: the Tech Transfer Program (TTP). VA even shares some of the money generated from sales in the form of royalty payments to the inventor if an idea is patented and reaches the commercial market.

It is critical to protect intellectual property early in the process. It's never too early to learn if a new idea might be patentable.

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Intellectual Property
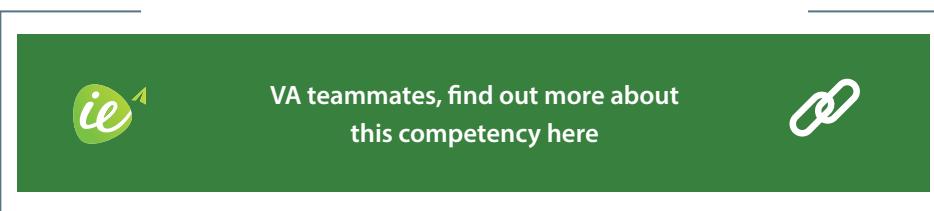
What It Is

Intellectual property (IP) refers to creations of the mind, such as inventions; literary and artistic works; designs; and symbols, names, and images used in commerce. IP is protected by law through patents, copyrights, and trademarks, which enable people to earn recognition or financial benefit from what they invent or create. By striking the right balance between the interests of innovators and the wider public interest, the IP system aims to foster an environment in which creativity and innovation can flourish.

A patent is an exclusive right granted for an invention. A patent provides the patent owner with the right to decide how—or whether—the invention can be used by others. In exchange for this right, the patent owner makes technical information about the invention publicly available in the published patent document.

Every organization's legal and IP system and patent mechanisms are unique. Your legal department should be consulted and be collaborated with, as you develop your program to align patent processes and goals with that of the organization.

Check with the intellectual property experts at your organization for tools, templates, and references to support this skill.

> **VA teammates, find out more about this competency here**

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Intellectual Property

Skill Levels

Novice

- Understand the basics of technology transfer and the importance of early disclosure to protect IP rights.

- Able to initiate the disclosure process with your organization's legal department and gather the necessary information from employees, such as a detailed description of the invention, employee' affiliations, funding sources and resources used.

- Able to advise employees about the benefits of disclosing their ideas to TTP, addressing concerns about rights and explaining the potential advantages of working with them.

- Maintain a strong working relationship with TTP specialists, initiate meetings with inventors and TTP representatives to discuss new ideas and inventions, and skillfully ask relevant questions about timelines, required forms and any limitations during the disclosure process.

Proficient

- Proactive in engaging with employees and TTP specialists, ensuring timely and appropriate disclosure of inventions. Understand the long-term benefits of licensing agreements and royalty revenue sharing.

- Able to anticipate challenges and help employees navigate complex intellectual property issues.

- Actively seek solutions and facilitate productive collaborations between employees, legal and other stakeholders.

Expert

- Deep understanding of the legal and administrative aspects of IP, including patenting, licensing and royalty revenue sharing.

- Provide leadership and guidance to other Innovation Specialists and investees and help staff members understand the potential impact of their ideas and inventions.

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Intellectual Property

Tools and Templates That Support This Skill

Tools

Articles

Invention Certification Form

VA Technology Transfer Program Training in TMS
Search TMS ID 131008977

Tech Transfer Policy
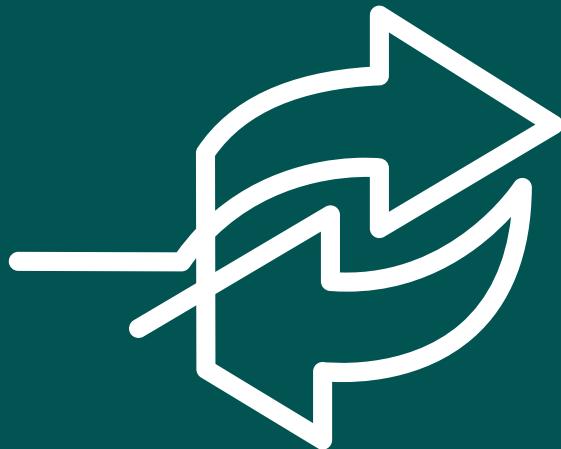
Technology Transfer at VA

Intervention Disclosure and Verification (VA.gov)

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3.3 Change Agency

For this competency, we will focus less on the theory of change management; instead, we will focus on how to prepare people for change, ways to obtain buy-in and the most up-to-date thinking on being a change agent.

Change Agency

What It Is

Top-down proclamations and leadership-driven efforts have been the predominant approach to "change management" for years. Within the last few decades, research and practical experience have told us that most change is actually managed through people with "change agency." A change agent is someone who is actively developing the skills, confidence, power, relationships and courage to make a positive difference.

> **A change agent could come from any department at any level. They could be a Veteran, a caretaker, a clerk or a physician. A change agent does not hold a particular job; rather, their role is defined as a person who has created a shared purpose and is leveraging their skills and connections (or the connections of others) to positively effect change in an organization or community.**

One of the core responsibilities of a program lead is to create and lead change by acting as a change agent.

When and How This Shows Up at Work

The competencies in this Playbook provide you with the tools and mindsets necessary to function as a change agent at work. When you facilitate a class, coach an employee or advocate for protected time, you are acting as a change agent. Beyond nurturing a culture of innovation, these actions build your innovation community, create psychological safety and empower other change agents to step forward, expanding your network and making change.

Change agency and change management skills also show up during innovation project work. Employees and other team members at an advanced level often expect enthusiastic support of their ideas; the truth is that these projects are at the start of the innovation adoption curve, not the end. Your job as a change agent will be to use your expertise and knowledge to create excitement and support for the innovative new products and programs being developed to help identify and engage the early adopters.
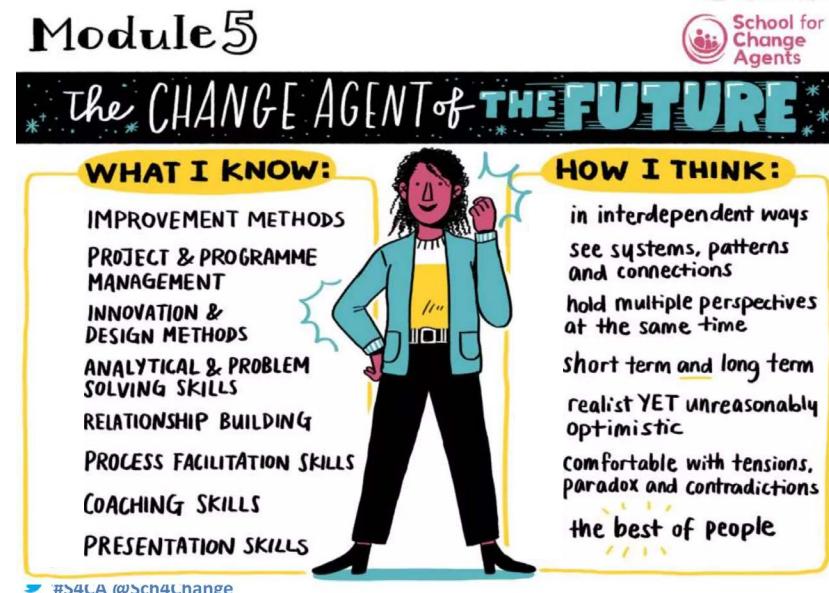
> VA teammates, read about Spread vs Diffusion by clicking here

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Change Agency

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Change agents come in many forms and are not limited to those who are high up in the organizational hierarchy. The National Health Service in Great Britain has outstanding resources and perspectives on the value and development of change agents. Below is a sketch of their perspective on what an organizational change agent should know and think.

Source: https://www.slideshare.net/HorizonsCIC/school-for-change-agents-2018-the-change-agent-of-the-future

> **VA teammates, read about three scenarios in which Change Agency might help in your role**

As a program lead supporting an organizational team, you show your value in this area by:

- **Thoughtfully building yourself up** as a change agent so you can best support your team and employees.

- **Being a good listener, developing trust and creating a psychologically safe environment** for teams to be creative and to fail.

- **Using the framework for Microclimates of Innovation** to foster a fun and creative environment for innovations and innovators.

- **Being aware** of where the chasm occurs between testing and diffusing an innovation, and guiding teams as they adapt, adopt or abandon new solutions.

Change Agency

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Skill Levels

Novice

- Understand the need to demonstrate curiosity and empathy during change initiatives using a variety of HCD tools (e.g., qualitative interviewing, empathy mapping, journey mapping).

- Lead others through influence and engagement (not an over-reliance on formal reporting structure).

- Create a statement outlining "Our Shared Purpose" with others that unites people and supports more cohesive and focused action.

- Demonstrate curiosity and empathy during change initiatives using a variety of HCD tools (e.g., qualitative interviewing, empathy mapping, journey mapping).

Proficient

- Understand the change being sought for different iNET projects and use strategic approaches about who to involve (and how) based on the level of risk and uncertainty.

- Identify social influencers through various channels, including social medial platforms, network mapping and in-the-field discussions/observations.

- Stay up to date on organizational change agency and leadership and integrate them into your practice.

Expert

- Guide and teach others how to be successful change agents with confidence.

- Use your program lead experiences to contribute to the growing body of knowledge on change leadership and agency in large organizations.

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Change Agency

Tools and Templates That Support This Skill

Articles

Tools

Video

Book

Articles

Psychological Safety
by Amy Edmondson

Organizational Change
by Suzanne Gibbs Howard and Mathew Chow

Change is Hard. Here's How to Make it Less Painful
by Erika Andersen

The Network Secrets of Great Change Agents
by Julie Battilana and Tiziana Casciaro

Tools

School for Change Agents

The Change Model Guide

Video
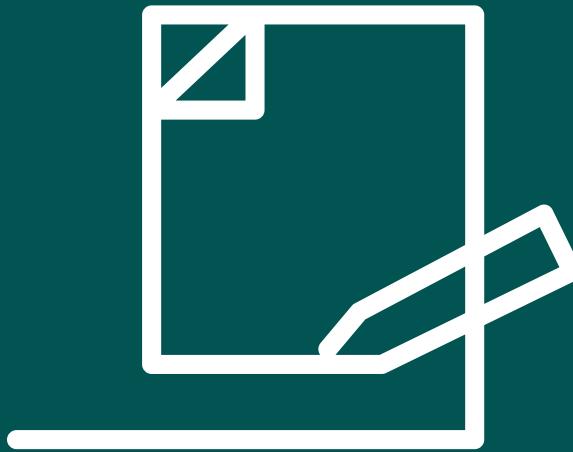
School for Change Agents
with Helen Bevan

Book

Old Power, New Power
by Jeremy Heimans and Henry Timms

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3.4 Contracting

Contracting is a part of the purchasing process. Within the government, contracts are required when the total dollar value of a purchase request exceeds a certain level set at the national level. iNET contracts are created and managed by a national group called the Strategic Acquisitions Center (SAC). Your job as a program lead is to understand your organization's procurement mechanisms, create and update the required documentation, and assist in procuring what your employees need to innovate.

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Contracting

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What It Is

Every organization's procurement system and contracting mechanisms are unique. Your procurement, logistics or contracting department should be consulted and collaborated with as you develop your program to align processes and goals with that of the organization.

Check with the contracting agents at your organization for tools to support this skill.

VA teammates, find out more about this competency here

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Contracting

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Skill Levels

Novice

- Able to determine what type of procurement methodology will be needed to meet program needs.
- Describe the basic responsibilities of an Innovation Specialist related to contracting.
- Understand and recall the threshold values for contract requirements.
- Recognize the significance of and obtain COR certification.

Proficient

- Apply knowledge of contracting in scenarios like prototype creation, specialized expertise and local project support when required.
- Able to complete all required contracting documents with assistance and review.
- Evaluate the efficiency and effectiveness of the contracting process in various scenarios, suggesting improvements when necessary.

Expert

- Independently drive the creation, execution and management of contracts, act as a key liaison between multiple stakeholders, and correctly fill out required contract documentation without assistance.
- Be a mentor to less experienced Innovation Specialists, guiding them through the complexities of contracting.

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3.5 UX Testing

Ideas are easy, implementation is hard. In between those two things, we have User Experience (UX) Testing. UX testing is a hands-on way to refine and evolve an idea, make it real and make it relevant. You don't need to be an expert in innovation and design to do it, you just must be open to learning and collaboration, and it doesn't hurt to be a bit scrappy.

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UX Testing

What It Is

UX testing is also known by other names, including prototyping and concept testing. These terms refer to the process of having someone test your idea or design to learn about its desirability, feasibility or viability. UX testing is successful when it helps you identify problems with your product or service, discover opportunities for improvement or enhancement, and learn more about people's behaviors, needs, preferences and goals.

UX testing comes after rapid prototyping. It's the best way to get feedback on an early-stage design before too much time or too many resources have been invested in an idea. It's easy in theory but difficult in practice. Receiving constructive feedback is a skill that many people struggle with; it's your job as a program lead to create the environment for feedback to be openly given and received.

When and How This Shows Up at Work

The need for UX testing will show up at various points of your innovation journey. A project or program prototype will have to undergo multiple rounds of UX testing, making iterative improvements on the prototype as you go. UX testing will then expand to multiple organizations to test its viability in other environments with new groups of people. You will help guide employees through the process of UX testing, gathering feedback and ensuring that iterative changes and improvements are made to truly create human-centered solutions.

While you may not be engaging in UX testing as a new program lead, the skill set will be crucial as you seek to move innovation projects through the later stages of their development.

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UX Testing

Three Scenarios in Which UX Testing Might Help in Your Role

Explore a New Product	An employee has developed the first prototype of their new product or service idea, and they want to understand if, and how, people will use it before putting resources into creating something more complex.
Rough Prototype Feedback	An innovation project has a rough prototype drawing of a new product, and the employee wants to learn how/if to move forward with their design to ensure they have correctly grasped the cause of the identified problem.
Iterative Design	An employee emails you about an existing, functional product they have developed. They are open to improving how it works and would like assistance with bringing their idea to a larger audience.

As a program lead, you support your employees through UX testing by:

- **Recognizing when it's time to test an idea** in both its rough and refined forms.

- **Determining the right level of fidelity** (detail and technicality) of a project prototype.

- **Gathering the right resources** to create low- through high-tech prototypes.

- **Determining the budget** and means for recruiting and/or compensating participants.

- **Determining which qualitative and quantitative metrics are appropriate** for employees to gather.

- **Adapting, adopting or abandoning concepts and designs based on feedback.** Guide difficult discussions with employees who can be very emotionally invested in their initial idea.

- **Determining the appropriate individuals** or groups with whom they should share their progress.

- **Recognizing when the UX testing process is going well** for all involved and course correcting when/if it's not.

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UX Testing

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Skill Levels

Novice

- Determine how to scope an idea appropriately for UX testing.

- Brainstorm ways to test an idea at various levels of fidelity.

- Create a simple, yet specific, list of questions to investigate during UX testing.

- Observe, take notes and record relevant qualitative and quantitative data during testing.

- Share insights from testing with stakeholders with various levels of understanding.

Proficient

- Define qualitative and quantitative metrics to measure success and impact of UX testing.

- Establish a testing plan, articulating how to introduce and facilitate the test.

- Identify the right people and context for testing.

- Facilitate testing in an approachable way without biasing results.

- Ask follow-up questions for feedback and insights during and after testing.

Expert

- Translate raw data and insights into design requirements and revisions.

- Lead a team of less-experienced team members through the process.

- Recognize when things are going well for all involved and course correcting in the moment when/if they're not.

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UX Testing

Tools and Templates That Support This Skill

Tools

Prototype Canvas

What and Why of Usability

Usability Test Plan Dashboard

Usability Testing 101

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3.6 Mentorship

Think of how you got to where you are today in your professional and personal life. Who are the people along the way who have helped you, provided guidance and looked out for you? Now think of what you'd like your next steps to be, professionally and personally. Who are the people who can help you get there? Those people are your mentors.

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Mentorship

What It Is

Mentors are people—often with more experience or expertise than we have—who actively help others achieve their personal goals. They are trusted advisors who listen and provide guidance and support. Often, they have more experience than their mentees in a certain area, but that doesn't mean they need to be older or more senior professionally. What's most important to mentees is to have a mentor they respect and trust, and with whom they feel comfortable being honest.

When and How This Shows Up at Work

Mentorship will show up in two different but equally important ways during your time as a program lead. As a mentor you'll use your knowledge, skills and experience to help new team members learn, grow and achieve their full potential in the program lead role.

You will also mentor other employees. Recall from earlier in the Playbook that mentoring is different from coaching. Coaches focus on individuals or teams as they work on a specific project and help guide them through milestones to achieve a goal. Mentors help individuals work on their own personal or professional goals and development over the long term.
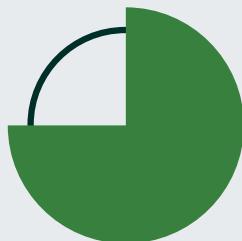
> The Spark-Seed-Spread program is focused on employee development just as much as project outcomes. As a coach you'll help investees progress through the stages of HCD as they work toward project success. As a mentor you'll work with these same employees to ensure they grow personally and professionally and learn new skills and behaviors that will serve them even after their time in Spark-Seed-Spread is over.

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Mentorship

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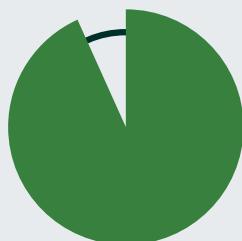
Need hard evidence about the importance of mentorship?

75%

**of executives
credit their success
to mentors**
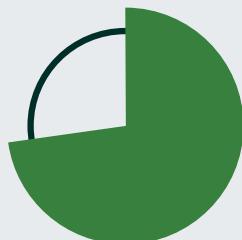
Click here to view Source

90%

**of employees
with a career mentor
are happy at work**

Click here to view Source

71%

**of executives typically choose
to mentor people of their
same gender or race**

Click here to view Source

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Mentorship

Scenarios in Which Mentorship Might Help Your Role

Mentoring Other Program Leads	A new program lead reaches out to other leads asking for help. Using your experience, you reach out and help mentor your new team member through the process.
Guiding Potential New Team Members	An employee reaches out and asks how they can become a program lead. You provide direct guidance and help them understand the skills needed to join the organization.

As a program lead supporting employee innovators, you show your value in this area by:

- **Asking your team how you can best support them** so you can make sure you're acknowledging where they are on their own journey.

- **Listening closely** to their challenges and goals so that they feel heard and trust the mentorship you are providing them.

- **Connecting them with the right people and resources** to obtain the approvals, funds, tools and skills needed to kick-start and complete their project.

- **Sharing lessons learned** from your own experiences so the advice and guidance you provide feels grounded and real.

- **Creating aspirations for the future** of their project so that they can think big and maintain their inspiration throughout their work.

- **Being a regular sounding board** the team can come to for advice and guidance, whether through casual email conversations or more regular, scheduled check-ins.

- **Recognizing you don't have all the answers** and reaching out to others for help when you need it.

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Mentorship

Skill Levels

Novice

- Identify if you are the right person to mentor an individual or team, based on personality, their needs and your experience and availability.

- Comfortable asking a mentee to define their goals and their needs. Listen closely and ask follow-up questions so you are both clear on what's needed.

- Understand the need for a network of acquaintances, friends and colleagues with complementary skills to your own so you have people with whom to connect potential mentees.

Proficient

- Mentor newer program leads, sharing expertise and knowledge to foster a culture of innovation and collaboration within the organization. This includes the ability to act as a "Swim Buddy" for new Innovation Specialists.

- Establish a network of acquaintances, friends and colleagues with complementary skills to your own so you have people with whom to connect potential mentees.

- Determine what level of mentorship is needed, whether it be weekly email check-ins, monthly in-person meetings, quarterly consults or something else.

- Establish clear expectations with potential mentees: what you can provide, what you can't provide, and the cadence and means of communication you'll have.

- Set some SMART goals together that they can reasonably achieve with the help of your mentorship.

Expert

- Provide direct feedback when needed, whether in support of your mentee's progress or to critique or redirect their efforts.

- Know when it's time for the formal mentoring relationship to end. Able to do so in a meaningful and psychologically safe way.

Mentorship

Tools and Templates That Support This Skill

Articles

Tool

Video

Mentoring for the First Time? 14 Steps to Start Off on the Right Foot
by Forbes Coaches Council

6 Things Every Mentor Should Know
by Vineet Chopra and Sanjay Saint

5 Ways to Become a Better Mentor
by Tejas Vemparala

Be One, Get One: The Importance of Mentorship
by Alyssa Rapp

Does Mentoring Still Matter for Fortune 500 Companies?
by Gracey Cantalupo

What It Is, Why You Need It and How to Find a Good Mentor
by Michelle Perchuk

A Better Approach to Mentorship
by Christopher "CJ" Gross

Mentorship in the Health Professions, A Review
by Annette Burgess, Christie van Diggele, & Craig Mellis

Coqual: The Sponsor Divided, Key Findings

How Reverse Mentorship Can Create Better Leaders
by Patrice Gordon

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Glossary

Glossary

Change Agent
Someone who is actively developing the skills, confidence, power, relationships and courage to make a positive difference.

Change Agency
The power, individually and collectively, to make a positive difference. It is about pushing the boundaries of what is possible, mobilizing others and making change happen more quickly.

Change Management
A process or systematic approach for dealing with organizational transformations or changes. The purpose of change management, while varying greatly, often focuses on implementing strategies for effecting change, managing the change approach and helping people—usually the workforce—adapt to change.

Psychological Safety
An emotionally safe space at work where people believe they will not be punished or humiliated for speaking up with ideas, questions, etc. Psychological safety as a concept is based on the work of Amy Edmondson. An in-depth Google study found that psychological safety was by far the most important dynamic that set successful teams apart.

"ALL IDEAS GROW OUT OF OTHER IDEAS."
— ANISH KAPOOR

Trust
While trust and psychological safety do have a lot in common, they are not completely interchangeable concepts. Trust is more individual (e.g., your relationship with other employees) and psychological safety is more about dynamics at the group level (e.g., If I try out this new solution and am awkward, will my peers make fun of me?).

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Old Power, New Power
This is a framework from the research of Jeremy Heimans and Henry Timms. New Power is about values and how they are realized, often through collaboration and participation from people who are often not formally connected. It may involve crowd sourcing, social media and/or personal connections. Old Power is the more traditional hierarchy and formal structures.

Microclimates for Innovation
This is a framework from the research of Christi Zuber. Innovation microclimates may be a more realistic path to building innovation capacity and creating an appetite for change than waiting for an entire culture change. Innovation Specialists and program leads can create microclimates within their organizations and model how to embrace and spread change.

Diffusion of Innovation
A theory based on the research of E.M. Rogers, it describes how new ideas, behaviors, technologies, services, etc. spread through a population, going from the Innovators through to the Laggards. It has been further researched in the health care context and is helpful information when working with new innovative concepts.

VA teammates, view and download checklists here!

The appearance of external hyperlinks does not constitute endorsement by the Department of Veterans Affairs of the linked websites, or the information, products or services contained therein.

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VHA Innovation Ecosystem