



## 2015 FELLOWS PROGRAM, SESSION I

Monday, June 22 – Friday, June 26, 2015

The Westin Gaslamp Quarter | San Diego

### AGENDA

#### Adaptive Leadership: Mobilizing for Change

Session Objective: Participants will strengthen the leadership skills needed to mobilize their organization to adapt and thrive in challenging environments.

MONDAY, JUNE 22   THE WESTIN GASLAMP QUARTER	
<b>Today's Objectives</b> <ul style="list-style-type: none"> <li>• Explore the distinction between the functions of authority and the functions of leadership. Start to diagnose what role is required of you given the nature of the work you're facing, and examine strategies for exercising both.</li> <li>• Learn how to balance being involved in daily action, while also gaining strategic perspective to see the broader patterns and surrounding dynamics. Practice “getting on the balcony” and generating multiple interpretations of what you see happening at the site visit institution.</li> <li>• Explore the changing context in the health care sector and the adaptation required to succeed in this new world.</li> <li>• Clarify the gap between your organization's current state and the aspired state.</li> <li>• Refine and diagnose your individual challenge by parsing out the technical and adaptive elements.</li> </ul>	
7:30 - 8 am Harbor Room, 3 <sup>rd</sup> floor	<b>Breakfast</b>
8 - 9:20 am Harbor Room, 3 <sup>rd</sup> floor	<b>Welcome, Introductions, and Overview of Session</b>
9:20 - 9:30 am	<b>Break</b>
9:30 - 9:45 am Harbor Room, 3 <sup>rd</sup> floor	<b>Foundation Idea #1: Introduction to Adaptation</b> <p>Changing external environments and shifting internal aspirations demand new strategies and abilities. Thus, adaptation requires letting go of behaviors, practices, and capabilities that no longer serve your team or organization to create space to experiment with new ways of working that will enable you to thrive in the new environment. Given this, a central challenge in leading change is to engage people in distinguishing what are the core, emerging, and legacy practices to the way your team or organization operates.</p>

<p>9:45 - 10:30 am Harbor Room, 3<sup>rd</sup> floor</p>	<p><b>Foundation Idea #2: The Distinction between Leadership and Authority (Mobilizing the System)</b></p> <p>Leadership is an activity that can be practiced by anyone at any time. While technical problems can be managed, adaptive issues require leadership to resolve them. The opportunities for exercising leadership come before each of us every day, wherever you sit in an organization. What skills, behaviors, and practices are useful when leading from a position of authority? How does simply being in a position of authority differ from exercising leadership? This session identifies the resources and strategies you can employ when exercising leadership or authority.</p> <p><b>Leadership and Authority (Mobilizing the System) – Application</b> Fellows will explore the relationships of leadership and authority to their own adaptive challenge. Fellows will work individually and in small groups, using the Authorizing Environment worksheet to identify their scopes of authority so they can be more deliberate about stepping into leadership territory. Fellows will consider the following: expectations they are trying to meet, pressures making it hard to do their jobs, and expectations that may have to be disappointed to respond to other priorities. Fellows will also address content around building formal and informal authority.</p>
<p>10:30 - 10:45 am Harbor Room, 3<sup>rd</sup> floor</p>	<p><b>Break</b></p>
<p>10:45 - 11:45 am Harbor Room, 3<sup>rd</sup> floor</p>	<p><b>Foundation Idea #3: Distinguishing Technical Problems from Adaptive Challenges (Diagnosing the System)</b></p> <p>Distinguish technical problems from adaptive challenges. Technical problems are clearly defined and have straightforward solutions amenable to authoritative expertise. Adaptive challenges are hard to identify, require changing hearts and minds, and often are championed by someone who lacks the authority to effect change. The ability to recognize and apply the right skills to an adaptive challenge is critical to high performance. Organizations most commonly waste time and resources when they treat adaptive challenges as technical problems. Fellows will explore technical and adaptive differences through a group example (i.e. What are the adaptive elements of a particular challenge in health care?).</p> <p><b>Technical and Adaptive (Diagnosing the System) – Application</b> Building on participants’ prework, this session will focus on applying knowledge of adaptive and technical characteristics to each fellows’ individual adaptive challenge through a structured discussion and worksheet. Fellows will be guided in diagnosing the adaptive aspects of the challenges their organizations face, which will serve as the basis for their project work. The session will begin with work individually, move to pair work, and conclude with group check-in.</p>
<p>11:45 am - noon Harbor Room, 3<sup>rd</sup> floor</p>	<p><b>Foundation Idea #4: Getting on the Balcony (Diagnosing the System)</b></p> <p>Systems thinking is a critical skill for practicing leadership. In this session, the fellows will learn how to balance being involved in daily action while also gaining strategic perspective to see broader patterns and surrounding dynamics.</p>

	<p>Being able to envision the structural, political, and social systems will create new possibilities and innovative approaches for fellows' projects. Fellows will apply the idea of "getting on the balcony" in real time by using their group as a case.</p> <p>Fellows also will be encouraged to reflect on these questions during the afternoon site visit:</p> <ul style="list-style-type: none"> <li>• Look for leadership and authority dynamics. How do you understand the authority dynamics in the organization based on how people in various roles show up?</li> <li>• How do people respond when they don't experience authority?</li> <li>• How do you interpret the pressures in the system based on how you see people operating?</li> <li>• How does the system really work versus the story they tell?</li> <li>• What technical accomplishments and challenges can you identify? How does adaptive work show up?</li> </ul>
<p>noon - 12:45 pm Harbor Room, 3<sup>rd</sup> floor</p>	<b>Lunch</b>
<p>12:45 - 1 pm Hotel Lobby</p>	<p><b>Load bus for travel to UC San Diego (UCSD) Health System</b></p> <ul style="list-style-type: none"> <li>• Begin loading bus at 12:45 pm, depart at 1 pm</li> </ul>
<p>1 - 1:30 pm</p>	Travel to UCSD Health System – Hillcrest Medical Center
<p>1:30 - 2 pm Hillcrest Medical Center Auditorium</p> <p>2 - 2:10 pm</p> <p>2:10 - 2:40 pm Trauma or Behavioral Health Departments</p> <p>2:40 - 2:50 pm</p> <p>2:50 - 3:20 pm Trauma or Behavioral Health Departments</p> <p>3:20 - 3:30 pm</p> <p>3:30 - 3:45 pm Auditorium</p> <p>3:45 - 4:30 pm Auditorium</p>	<p><b>Site Visit to UCSD Health System – Hillcrest Medical Center</b></p> <p>Welcome and chat with Tom Moore, MD, CEO faculty practice and dean for clinical affairs</p> <p>Break and walk to first department visit</p> <p>Department visit and discussion with leaders – part 1 Fellows will be split into two groups:</p> <ul style="list-style-type: none"> <li>• trauma department</li> <li>• behavioral health department</li> </ul> <p>Break</p> <p>Department visit and discussion with leaders – part 2 Fellows will switch departments.</p> <ul style="list-style-type: none"> <li>• trauma department</li> <li>• behavioral health department</li> </ul> <p>Break</p> <p>Refreshments</p> <p>HERE Initiative presentation</p>

4:30 - 5 pm	<b>Travel back to hotel</b>
6 pm The Prado at Balboa Park	<b>Off-site Networking Dinner</b> <ul style="list-style-type: none"> <li>Meet in the lobby at 5:30 pm, bus will depart at 5:40 pm</li> </ul>
<b>TUESDAY, JUNE 23   THE WESTIN GASLAMP QUARTER</b>	
<b>Today's Objectives</b> <ul style="list-style-type: none"> <li>Delve deeper into the distinction between the functions of authority and the functions of leadership with a particular focus on exercising leadership without formal authority.</li> <li>Begin to recognize your default behaviors and experiment with new ways of showing up.</li> <li>Learn how to mobilize others and activate them as resources for adaptive problem-solving through peer consulting.</li> <li>Explore what is holding you in place and impeding change on an individual level.</li> <li>Map the stakeholders involved in your adaptive challenge and explore techniques for mobilizing various factions to make progress.</li> </ul>	
8 - 8:30 am Harbor Room, 3 <sup>rd</sup> floor	<b>Breakfast</b>
8:30 - 9 am Harbor Room, 3 <sup>rd</sup> floor	<b>Debrief Day 1</b>
9 - 10:15 am Harbor Room, 3 <sup>rd</sup> floor	<b>Leadership without Authority</b>  Without formal and informal power to change someone or something, what strategies, practices, coalitions, and framing create real influence?  <b>Debrief</b> Discussion will center on these questions: <ul style="list-style-type: none"> <li>How do you create change when you are not in charge?</li> <li>How do others (and you) respond when they (you) don't experience authority?</li> <li>What strategies did you employ during the sit-down exercise? How does this reflect how you ordinarily "show up and intervene" at work?</li> <li>What roles were others (and you) trying to play in the group?</li> <li>When others chose to intervene, how do you understand what was behind their interventions?</li> </ul>
10:15 - 10:30 am Harbor Room, 3 <sup>rd</sup> floor	<b>Break</b>
10:30 - 11:30 am Harbor Room, 3 <sup>rd</sup> floor	<b>Peer Consulting Introduction and Public Case</b>
11:30 am - 12:15 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Peer Consulting Round 1</b> Break into groups of four. Peer consult on individual leadership challenges.
12:15 - 1 pm Harbor Terrace, 3 <sup>rd</sup> floor	<b>Lunch</b>
1 - 1:45 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Peer Consulting Round 2</b>
1:45 - 2 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Peer Consulting Debrief</b>

2 - 3:15 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Foundation Idea #5: Why is Change so Difficult? (Diagnosing Self)</b>  Fellows will explore what gets in the way of personal improvement despite sincerest intentions, smartest plans, and best efforts. This session will also help illuminate potential ways to move forward.
3:15 - 3:30 pm	<b>Break</b>
3:30 - 4:15 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Foundation Idea #6: Thinking and Acting Politically (Mobilizing Self)</b>  Traditional stakeholder analysis paints a two-dimensional picture of other subgroups. Adaptive leadership adds key components to illuminate the system's factions and create strategies for mobilizing people across traditional loyalties. Fellows will explore the concept using a live case example.
4:15 - 4:45 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Thinking Politically (Mobilizing Self) – Application</b>  The Thinking Politically tools and concepts will be applied to the individual leadership challenges. Fellows will work individually and in small groups using the Mapping the System worksheet to identify the individuals and factions who have a stake in their adaptive challenges, along with the factions' loyalties, values, and losses that can stymie progress. Fellows will begin to develop a mobilization strategy.
4:45 - 5 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Debrief</b>  Making progress will require fellows to do some things that are outside of their comfort zones and may make others uncomfortable, as well. Fellows will be encouraged to consider this: What have you <i>not</i> done that would help you make progress, but that may ruffle feathers?
5:30 pm	<b>Class photo</b>
5:30 - 7 pm California Foyer, 2 <sup>nd</sup> floor	<b>Reception</b>
7 - 7:30 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Pizza dinner</b>
7:30 - 9 pm Santa Fe Room, 2 <sup>nd</sup> floor	<b>Fellows Connecting to Purpose</b>  Leadership requires risk-taking. Risk-taking is best done in a “holding environment” – that is, a supportive structure where people can reach beyond their comfort zone. This highly interactive session will explore purpose, risk-taking, and the creation of a holding environment in the service of reaching beyond our current, self-imposed limitations.

WEDNESDAY, JUNE 24 | THE WESTIN GASLAMP QUARTER

### Today's Objectives

- Explore experimental protocols for scaling resources and minimizing risks to test assumptions and prototype new ways of working.

<ul style="list-style-type: none"> <li>• Develop a customized action plan to make immediate progress on projects.</li> <li>• Anticipate the challenges you may face moving forward and determine strategies for remaining steady and committed.</li> </ul>	
8 - 8:30 am Harbor Room, 3 <sup>rd</sup> floor	<b>Breakfast</b>
8:30 - 9 am Harbor Room, 3 <sup>rd</sup> floor	<b>Debrief Day 2</b>
9 - 10:30 am Harbor Room, 3 <sup>rd</sup> floor	<b>Peer Consulting Rounds 3 and 4</b>
10:30 - 10:45 am	<b>Break</b>
10:45 - 11:45 am Harbor Room, 3 <sup>rd</sup> floor	<p><b>Foundation Idea #7: Experimentation and Smart Risk-Taking</b></p> <p>Adaptation requires disciplined experimentation and risk-taking to test assumptions and prototype new ways of working. Fellows will learn experimental protocols for scaling limited resources and minimizing risk. Fellows will design an initial experiment that serves as the basis for subsequent, self-paced peer consulting sessions.</p> <p><i>and</i></p> <p><b>Action Planning</b></p> <p>Fellows will discuss cultivating plans and next steps. Through individual and small group work, fellows will develop a customized action plan to make immediate progress on their action-learning projects based on key takeaways from the two-day session.</p>
11:45 am - noon Harbor Room, 3 <sup>rd</sup> floor	<p><b>Staying Alive and Program Close</b></p> <p>Leadership work is always risky and demanding. It is fortunate that there are numerous things that you can do to anchor and rejuvenate yourself, and build your skill and will to engage in and survive acts of leadership across a lifetime. This discussion will help fellows anticipate challenges they may face and share techniques for remaining steady and committed while deploying their mobilization strategies within their member organizations.</p>
noon - 12:10 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Short Break (take boxed lunches to seats)</b>
12:10 - 12:40 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Working lunch, wrap up, next steps, and closing</b>
12:40 - 2 pm Harbor Room, 3 <sup>rd</sup> floor	<b>Closing exercise</b>
2 pm	<b>Fellows-Only Session Adjourned</b>

3:30 – 5 pm California Ballroom, 2nd floor	<b>VITAL2015 Opening General Session</b>
5:30 - 7 pm Garden Terrace, 4th floor	<b>Opening reception</b>
<b>THURSDAY, JUNE 25   THE WESTIN GASLAMP QUARTER</b>	
7 - 8 am California Foyer, 2nd floor	<b>Breakfast</b>
8 - 9 am <a href="#">See track schedule</a>	<b>Critical Conversations</b>
9 - 10:15 am California Ballroom, 2nd floor	<b>General Session</b>
10:15 - 10:45 am	<b>Break</b>
10:45 am – Noon <a href="#">See track schedule</a>	<b>Education Breakout Sessions</b>
noon – 2 pm California Ballroom, 2nd floor	<b>Gage Awards Luncheon</b>
2:15 - 2:45 pm <a href="#">See track schedule</a>	<b>Mini-Sessions</b>
3 - 3:30 pm <a href="#">See track schedule</a>	<b>Mini-Sessions</b>
3:30 - 4:15 pm California Ballroom, 2nd floor	<b>Poster Sessions</b>
4:15 - 4:45 pm California Ballroom, 2nd floor	<b>Rapid-Fire Presentations</b>
6:30 - 10 pm <a href="#">Offsite on USS Midway</a>	<b>VITAL2015 Celebration</b>
<b>FRIDAY, JUNE 26   THE WESTIN GASLAMP DISTRICT</b>	
7 - 8 am California Foyer, 2nd floor	<b>Breakfast</b>
8 - 9 am <a href="#">See track schedule</a>	<b>Critical Conversations</b>
9 am – noon California Ballroom, 2nd floor	<b>Closing General Session</b>

***PLEASE NOTE:***

*VITAL2015 programming begins Wednesday, June 24, at 3:30 pm. Fellows are required to attend all general sessions, receptions, and specific breakout sessions, including these:*

- *general sessions, mini-sessions, poster sessions, Rapid-Fire sessions, and receptions*
- *Critical Conversations: Foundations of Essential Hospital Financing, Thursday, June 25, 8 - 9 am*
- *Breakout Session: Medicaid Payment Models that Promote Innovation, Thursday, June 25, 10:45 am – noon*
- *Mini-Session: Late-Breaking Finance Issues: HHS Regulations and Guidance, Thursday, June 25, 2:15 - 2:45 pm*
- *Critical Conversations: The Executive Brain, Friday, June 26, 8 - 9 am*

*The complete Fellows Program session adjourns Friday, June 26, at noon; please plan accordingly.*