Disclosure:

Kate B. Hilton & Alex Anderson today have no relevant financial or nonfinancial relationship(s) within the services described, reviewed, evaluated, or compared in this presentation.
Session Objectives

- Describe the five domains of IHI’s psychology of change framework and their applicability to improvement efforts
- Introduce a collection of applied methods to advance the human-side of change
- Workshop ‘psychology of change’ practices with other attendees and faculty
# Quick Course Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>8:30-9:00</td>
<td>Introductions, Objectives, Agenda</td>
</tr>
<tr>
<td>9:00-9:30</td>
<td>Overview: Psychology of Change Framework</td>
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<tr>
<td>9:30-10:15</td>
<td>Adapt in Action</td>
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<tr>
<td>10:15-10:30</td>
<td>BREAK</td>
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<tr>
<td>10:30-11:15</td>
<td>Unleash Intrinsic Motivation</td>
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<td>11:15-12:00</td>
<td>Co-Produce in Authentic Relationship</td>
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<td>12:00-1:00</td>
<td>LUNCH</td>
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<td>1:00-1:45</td>
<td>Distribute Power</td>
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<td>1:45-2:30</td>
<td>Co-Design People-Driven Change</td>
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<tr>
<td>2:30-3:00</td>
<td>BREAK</td>
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<tr>
<td>3:00-3:40</td>
<td>Putting It Together</td>
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<tr>
<td>3:40-4:00</td>
<td>Next Steps, Evaluation &amp; Closing</td>
</tr>
</tbody>
</table>
Purpose of this section of agenda

- To set the tone
- To establish our shared purpose
- To create the conditions for us to have a psychologically safe, relational, productive and joyful day together
Materials

- Agenda
- Psychology of Change white paper
- Workbook
- Notepad

Everyone will receive slides & follow up materials
Who’s in the room? Introductions!

In one breath, tell the people at your table:

• Who you are
• Where you’re from
• What you hope to learn today!
• Whatever else you can fit in!
Kate B. Hilton
Alex Anderson
Hanna Sherman: Special Guest Faculty
Norms

- **Communication Norms**
  - 5 Habits of the Heart
  - Encouragement & permission to bring whole self
  - Lean toward curiosity
  - All teach, all learn
  - Others?

01. An understanding that we are all in this together
02. An appreciation of the value of otherness
03. An ability to hold tension in life-giving ways
04. A sense of personal voice and agency
05. A capacity to create community
Norms

- **Technology norms**
  - Please turn off cell phone, email & social media

- **Movement norms**
  - Get up, move around as desired
  - Change seats after each break & lunch
  - Fidget, play with pipe-cleaners, be your playful self
  - Excuse yourself when you need to

- **Proposed accountability norm**
  - Offer a verbal “love note” – what you love most about being a part of the psychology of change Quick Course
Improvement in Action

- **Rapid assessment forms:**
  - On your tables: we will collect at the end of each session for real-time feedback.

- **Reflection Walls:**

  **Bike Rack:** What questions or ideas are coming up that we may not be able to explore immediately but would like to find a way to address today?

  **Feedback:** What ideas, comments or questions do you have re: the psychology of change framework that could help us collectively improve it?
Share Your Experience Today

Share your Quick Course experiences on Twitter and tag:
@TheIHI @KateBHilton
@Alexanderhander #IHIForum
#PsychologyOfChange
Overview
Change is hard…

Why?
Countless Barriers to Change

- Power struggles
- Lack of buy-in
- Few or no results early on
- Need to adapt to different contexts
- Too much change at once
- Maintaining motivation
- Competing demands on people’s time
- Opposition within ourselves to change
- Misaligned incentives
- Fear of failure, rejection, job loss
- Confusing strategies
- Lack of leadership
- One-way communication
- Poor workforce planning
- Stifling innovation
- Playing it safe
- Poor project management
- Undervaluing staff
- Inhibiting environment
- Extrinsic motivation only
Countless Barriers to Change

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- Poor project management
- Undervaluing staff
- Inhibiting environment
- Extrinsic motivation only
So why does change matter?

- Acute Lymphoblastic Leukemia
- Coronary Heart Disease
- Acute Myocardial Infarction
- Erythroblastosis Fetalis
- Diabetes Mellitus
- Organ Transplantation
- Hepatitis C
- Pulmonary Embolism
- Caesarean Section
- Early childhood development
- Trauma-informed care
- Hot-spotting (Camden coalition)
- PACE
- Harm reduction
- Accountable care
- PCMH
- Chronic care model
- IMPACT/BH integration
We have many, many evidence-based, research-derived bio and socio-medical models that, if reliably applied and scaled to meet demand, would save or improve many lives.

Yet, most reach only a portion of those who could benefit:

- Difficult to disseminate and scale (McCannon 2007)
- Difficult to translate from experimental setting to “real world” (Ioannidis 2005)
- Difficult to reproduce in settings with heterogeneous resources (Parry 2013)
The “Know-Do” Gap

What we know

What we do

Yesterday

Today

Tomorrow
Growth rate for Level I evidence

What are we trying to accomplish?

How will we know that a change is an improvement?

What change can we make that will result in improvement?

Aim of Improvement

Measurement of Improvement

Developing a Change

Testing a Change

The Model for Improvement

Model for Improvement

What are we trying to accomplish?

How will we know that a change is an improvement?

What change can we make that will result in improvement?

Act  Plan

Study  Do
Rate at Which Change Spreads: People

- **Innovators**: 2.5%
- **Early Adopter**: 13.5%
- **Early Majority**: 34%
- **Late Majority**: 34%
- **Traditionalists**: 16%
Rate at Which Change Spreads: People

Like  Love  Haha  Wow  Sad  Angry
What Holds Us Back?

- The rate at which improvements spread relies at least in part on people
- People’s resistance to change comes from fear
  - Fear of failure, of losing control, of moving from habit to uncertainty
Resistance Is Good

- Must I suffer resistance?
  - Yes! Resistance is what we want!
    - Resistance to change in not a problem—it’s expected
    - Resistance indicates engagement with change and poses a dilemma about how we will work together to address it

Reframing the Question

From:

○ How can I get all these people to do what I want them to do?

To:

○ How can I get all these people to do what they want to do?
System of Profound Knowledge
W. Edwards Deming

Source: The New Economics, W. Edwards Deming
Deming’s System of Profound Knowledge

To improve, people are our fundamental source of value and must be treated as *partners*. That requires offering people the agency to make choices, tools to be effective, and a learning system for continual improvement.
Psychology in Improvement

- People want to create value and are our fundamental source of value.
- Move from systems driven by fear and extrinsic motivators to those driven by intrinsic motivation.
- Creating a culture that respects people and treats them as partners takes work and expertise.

W. Edwards Deming
Psychology is the science of the mind and human behavior, especially as a function of awareness, feeling or motivation.

Change is to cause to be different, or to transform.

Psychology of change is the science and art of human behavior as it relates to transformation.
# Contributing Disciplines and Thinkers

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<thead>
<tr>
<th>Discipline</th>
<th>Contributors</th>
<th>Suggested Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Improvement</td>
<td>W. Edwards Deming, Institute for Healthcare Improvement</td>
<td>The New Economics, IHI Leadership Framework</td>
</tr>
<tr>
<td>Psychology</td>
<td>Edward Deci, Richard Ryan, Albert Badura, Carol Dweck</td>
<td>Self-Determination Theory, Self-Efficacy, Growth Mindset</td>
</tr>
<tr>
<td>Organizing</td>
<td>Marshall Ganz, Hahrie Han</td>
<td>Organizing: People, Power &amp; Change</td>
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<td>Design Thinking</td>
<td>IDEO, Stanford School of Design</td>
<td>Design Thinking – IDEO U</td>
</tr>
<tr>
<td>Organizational Development</td>
<td>Robert Kegan &amp; Fredric Laloux</td>
<td>Immunity to Change, Reinventing Organizations</td>
</tr>
<tr>
<td>Transformational Change</td>
<td>John Kania, Mark Kramer, Peter Senge, John Kotter</td>
<td>The Fifth Discipline</td>
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<td>Co-Production</td>
<td>Maren &amp; Paul Batalden, Edgar Schien</td>
<td>Co-Production, Humble Inquiry</td>
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<td>Scaling-Up</td>
<td>Becky Margiotta, Joe McCannon, Robert Sutton, Huggy Rao</td>
<td>Skid Row School, Scaling Up for Excellence</td>
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<tr>
<td>Behavioral Change</td>
<td>Dan Heath and Chip Heath</td>
<td>Switch</td>
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<tr>
<td>Adaptive Leadership</td>
<td>Ronald Heifetz</td>
<td>The Practice of Adaptive Leadership</td>
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<tr>
<td>Teamwork</td>
<td>Amy Edmondson, J. Richard Hackman</td>
<td>Teaming, Motivational Task Design</td>
</tr>
<tr>
<td>Courage &amp; Authenticity</td>
<td>Parker Palmer, Brene Brown</td>
<td>Center for Courage &amp; Renewal</td>
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</tbody>
</table>
Psychology of Change

The science and art of human behavior as it relates to transformation

- Focuses on the people directly and indirectly affected by improvement
- Recognizes the inherent value in each person, regardless of identity or position
- Aims to **activate people’s agency** in the face of fear

Psychology of Change

AGENCY

The ability of an individual or group to choose to act with purpose

Power
The ability to act with purpose

Courage
The emotional resources to \textit{choose} to act

Three Levels of Agency

**Self**
An individual’s agency to make his or her own choices

**Interpersonal**
The collective agency of people acting together

**System**
The structures, processes, and conditions that support the exercise of agency within and across institutions and organizations

Adapt in Action
Acting can be a motivational experience for people to learn and iterate to be effective.

Distribute Power
People can contribute their unique assets to bring about change when power is shared.

Unleash Intrinsic Motivation
Tapping into sources of intrinsic motivation galvanizes people’s individual and collective commitment to act.

Activate People’s Agency

Co-Design People-Driven Change
Those most affected by change have the greatest interest in designing it in ways that are meaningful and workable to them.

Co-Produce in Authentic Relationship
Change is co-produced when people inquire, listen, see and mutually commit to one another.
Adapt in Action

Acting can be a motivational experience for people to learn and iterate to be effective.

Recommended Practices

1. Coach and Be Coached
2. Adopt a Growth Mindset
3. Fail Forward
4. Embrace Emergence

Unleash Intrinsic Motivation

Tapping into sources of intrinsic motivation galvanizes people’s individual and collective commitment to act.

Recommended Practices

1. Public Narrative
2. Motivational Task Design
3. Play and Celebrate

Co-Design People-Driven Change

Those most affected by change have the greatest interest in designing it in ways that are meaningful and workable to them.

Recommended Practices

1. Become Aware of Bias
2. Map Actors
3. Craft People-Driven Aim Statements

Co-Produce in Authentic Relationship

Change is co-produced when people inquire, listen, see, and commit to one another.

Recommended Practices

1. Practice One-to-One Meetings
2. Ask Open and Honest Questions
3. Practice Appreciative Inquiry
4. Listen Deeply

Distribute Power

People can contribute their unique assets to bring about change when power is shared.

Recommended Practices

1. Create a Shared Purpose
2. Develop Distributed Leadership
3. Establish Working Agreements
4. Cede Power

Improvement Measures

Primary Measures
• Higher change adoption rates
• Increased sustainability of change

Secondary Measures
• Sustained integration of psychology of change methods over time
• Increased joy and satisfaction
• Higher discretionary effort
• Higher resiliency: lower burnout and “dropout”

Objectives

• Explore what we mean by adapt in action
• Understand how adapting in action activates people’s agency
• Practice tools to adapt in action
Adapt in Action

Acting can be a motivational experience for people to learn and iterate to be effective.

Recommended Practices

1. Adopt a Growth Mindset
2. Fail Forward
3. Embrace Emergence
4. Coach and Be Coached

The Plan-Do-Study-Act (PDSA) Cycle

Sequential building of knowledge under a wide range of conditions

Changes that Result in Improvement

Spread

Implementation of Change

Wide-Scale Tests of Change

Follow-up Tests

Very Small Scale Test

Hunches, Theories, Ideas

DATA
Adapt in Action

- **Action** demonstrates people’s courage & is an exercise of their power
- PDSA is opportunity to test, learn and **adapt**
  - It’s okay to make mistakes, and essential to understand and learn from them
  - Data provides clues
  - Variation gives us energy to change behavior
<table>
<thead>
<tr>
<th>Technical Challenges</th>
<th>Adaptive Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to identify</td>
<td>Difficult to identify</td>
</tr>
<tr>
<td>Often lend themselves to quick and easy (external) solutions</td>
<td>Require (internal) changes in values, beliefs, roles, relationships, approaches to work</td>
</tr>
<tr>
<td>Often can be solved by an authority or expert</td>
<td>People with the problem do the work of solving it – and keeping it solved</td>
</tr>
<tr>
<td>Require change in just one or a few places, often within organizational boundaries</td>
<td>Require change in numerous places, usually cross organizational boundaries</td>
</tr>
<tr>
<td>People are generally receptive to technical solutions</td>
<td>People often resist even acknowledging adaptive challenges</td>
</tr>
<tr>
<td>Solutions can be implemented quickly – by edict</td>
<td>“Solutions” require experiments and new discoveries, they can take a long time to implement due to behavior change required</td>
</tr>
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</table>
## Technical v. Adaptive Solutions

<table>
<thead>
<tr>
<th>Technical Solution</th>
<th>Adaptive Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administer medication to lower blood pressure</td>
<td>Change lifestyle to get healthy, get more exercise and lower stress</td>
</tr>
<tr>
<td>Implement electronic ordering and dispensing of medications in hospitals to reduce errors and drug interactions</td>
<td>Encourage nurses and pharmacists to question and even challenge illegible or dangerous prescriptions by physicians</td>
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<tr>
<td>Increase penalty for drunk driving</td>
<td>Raise public awareness of the dangers and effects of drunk driving, targeting teenagers in particular</td>
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</table>
What adaptive challenges do you face in the improvement context?
Execution-as-Learning

- Operating in a way that allows individuals, teams and organizations to learn as they act
  - Groups adjust, improvise and innovate while at the same time delivering products or services
- A deliberately and consciously iterative process where action and reflection go hand-in-hand
  - Requires us to accept individual & collective fallibility
- Takes place in small groups or teams

Credit: Edmondson, Teaming
## Differences between Execution-as-Efficiency & Execution-as-Learning

<table>
<thead>
<tr>
<th>Execution as Efficiency</th>
<th>Execution as Learning</th>
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<tbody>
<tr>
<td>Leaders have answers</td>
<td>Leaders set direction</td>
</tr>
<tr>
<td>Stable work processes are put into place</td>
<td>Deliberately tentative work processes are put in place as starting point</td>
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<tr>
<td>Implementing change is seen as undertaking</td>
<td>Constant small changes are a way of life</td>
</tr>
<tr>
<td>Feedback is one-way</td>
<td>Feedback is two-way</td>
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<tr>
<td>Employee judgment is discouraged</td>
<td>Employee judgment is essential</td>
</tr>
<tr>
<td>Fear of boss is normal</td>
<td>Fear inhibits experimentation, analysis, problem solving</td>
</tr>
<tr>
<td>Goal: Capture profit today</td>
<td>Goal: Create long-term value</td>
</tr>
</tbody>
</table>

Credit: Edmondson, Teaming
“I HAVE MISSED MORE THAN 9000 SHOTS IN MY CAREER. I HAVE LOST ALMOST 300 GAMES. 26 TIMES, I’VE BEEN TRUSTED TO TAKE THE GAME WINNING SHOT AND MISSED. I’VE FAILED OVER AND OVER AND OVER AGAIN IN MY LIFE. AND THAT IS WHY I SUCCEED.”

- Michael Jordan
## Fixed v. Growth Mindset

<table>
<thead>
<tr>
<th>Fixed</th>
<th>Growth</th>
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<tbody>
<tr>
<td>Proving how great you are</td>
<td>Working on getting better</td>
</tr>
<tr>
<td>Hiding deficiencies</td>
<td>Overcoming deficiencies</td>
</tr>
<tr>
<td>Friends shore up self-esteem</td>
<td>Friends help you grow</td>
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<tr>
<td>Seek tried &amp; true</td>
<td>Seek stretch experiences</td>
</tr>
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</table>

**Growth mindset**: based on belief that your basic qualities are things you can cultivate through your efforts and experiences.

Credit: Dweck, Mindset
Failing Forward

Source: SCALE 1.0, Institute for Healthcare Improvement
Failing Forward is a Skill

- Fear of failure is a barrier to improvement & innovation
- Fear of making mistakes causes us to over-plan when experimentation (and inevitable failures) is what is needed to make progress
- Not sharing our mistakes as critical learning moments, means that others cannot benefit from our lessons learned
- Helping others adopt a Failing Forward mindset prepares them to embrace failures, learn from it, and share lessons learned with others

Credit: SCALE 1.0, Institute for Healthcare Improvement
What have you done or seen that is effective in helping people live into a growth mindset, fail forward, and execute as learning?
Emergent Learning

- Designing a process to help us learn from that experience, as that experience unfolds
  - Learning that emerges from the work itself – in order to inform that work as it unfolds
  - Creates a culture of reflective practice while engaging diverse perspectives & experiences
  - Turns work into a learning experience
### Before Action Review
- What are our intended results?
- What will success look like?
- What challenges might we encounter?
- What have we learned from similar situations?
- What will make us successful this time?
- When will we do an AAR?

### After Action Review
- What were our intended results?
- What were our actual results?
- What caused our results?
- What will we sustain or improve?
- What is our next opportunity to test what we learned?
- When will we do our next BAR?
Failure Modes

When we have a plan in place for dealing with obstacles and setbacks, we are more likely to stay in the growth-mindset

Failure Modes:

1. Identify a potential failure or risk
2. Assess its likelihood of occurring (1-10)
3. Assess the severity if it occurs (1-10)
4. Generate a total score: Likelihood x Severity
5. Determine mitigation strategies

Credit: Skid Row School, Billions Institute
<table>
<thead>
<tr>
<th>Potential Failure Mode</th>
<th>Likelihood (1-10)</th>
<th>Severity (1-10)</th>
<th>Total: Likelihood x Severity</th>
<th>Mitigation Strategy</th>
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Credit: Skid Row School, Billions Institute
“Coaching done well may be the most effective intervention designed for human performance.”

Dr. Atul Gawande
Hello there! How’s the water?
Hello there! How's the water?

Huh? What is water?
Coaching Adaptive Challenges

Why is coaching critical to the psychology of change?

- Addressing the human-side of change means *activating people’s agency* to achieve purpose in the face of challenge.

- *Coaching* is the act (and art!) of *activating people’s agency*.

What is coaching?

- Coaching is a direct *intervention* in an individual or team’s work process to help them improve their effectiveness or overcome challenges.
In your experience, what does a good coach do?
What doesn’t a coach do?
Good Coaches…

- Offer balance of supporting and challenging
- Create constructive tension
- Foster learning through reflection on both successes and failures
- Base coaching on a mutual pursuit of growth; not criticism or false praise
- Ask open & honest questions
- Guide toward solutions, don’t tell what to do
The Five Step Coaching Process

1. Observe
2. Diagnose
3. Intervene
4. Action Steps
5. Check-In
## Methods of Coaching

<table>
<thead>
<tr>
<th>Method</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Ask questions</td>
<td>Get more data; uncover perceptions of problems as well as possible solutions</td>
</tr>
<tr>
<td>2. Paraphrase / reflect / summarize</td>
<td>Stay on the path together</td>
</tr>
<tr>
<td>3. Read between the lines</td>
<td>Test possible alternative explanations</td>
</tr>
<tr>
<td>4. Offer suggestions</td>
<td>Draw on your own experience as a resource</td>
</tr>
<tr>
<td>5. Invite open advocacy</td>
<td>Invite person to recommend own possibilities and advocate for them</td>
</tr>
<tr>
<td>6. Invite alternative points of view</td>
<td>Open the door for questions, concerns and better solutions</td>
</tr>
</tbody>
</table>
Open & Honest Questions

- Intended to help the speaker understand him/herself more deeply by exploring his/her experience or convictions (and by doing so, we will understand him/her more deeply)
- Allows us to listen and understand while suspending judgment or disbelief, which builds & deepens trust
- Helps us to step back from jumping to solutions, assigning blame, or approaching with a specific end in mind
- Invites a person to discover their own wisdom & assets
Framing Open & Honest Questions

- A question to which you cannot anticipate the answer or have an expectation for
- Stay with the person’s language: *Can you say more about what that means to you?*
- Listen for understanding and allow questions to come from your heart, not just your head
- Ask questions aimed at helping the person rather than satisfying your curiosity
Listening

Strategic Issue

Motivational Issue

HOW

Strategy Analysis

Skills-Based Issue

WHY

Story Motivation

ACTION!
Breakout agenda: 15 min.

1. Introduce yourselves. (1 min)
2. Person 1 shares adaptive challenge; Person 2 practices asking open, honest questions. (7 min)
   - Do you hear a motivational, strategic or practice-based issue at play?
3. Switch! (7 min)
Tools to Adapt in Action

- Identify adaptive challenges
- Cultivate a growth mindset
- Fail forward (failure mode exercise)
- Learn through emergence (BAR / AAR)
- Coach and be coached
  - Open, honest questions
  - Listen for understanding
Relationship to Other Domains

- **Unleash intrinsic motivation**: We design action to motivate people on the basis of intrinsic values.
- **Co-produce in authentic relationship**: We support & reflect together to learn & fail forward.
- **Distribute power**: We invite an “all teach, all learn” growth mindset.
- **Co-design people-powered change**: We iterate and adapt based on what is workable in action to those most affected by the change.
Break

When you return, please sit at a new table!
New Table: Introductions!

In one breath, tell the people at your table:

• Who you are
• Where you’re from
• Your psychological superpower
• Whatever else you can fit in!
Energizer!
Mindful Breathing

Implications:
- Helps people cope with stress & reduce anxiety
- Connects people to their body & emotions
- Increases positive feelings & self-compassion
- Centers the mind around one’s intention
- Cools down flaring tempers & reduces tension
- Slows heart rate & improves energy level
Unleash Intrinsic Motivation
Objectives

- Explore what we mean by unleash intrinsic motivation
- Understand how unleashing intrinsic motivation activates people’s agency
- Learn a tool to unleash intrinsic motivation: public narrative
Unleash Intrinsic Motivation

Tapping into sources of intrinsic motivation galvanizes people’s individual and collective commitment to act.

Recommended Practices

1. Public Narrative
2. Motivational Task Design
3. Play and Celebrate

Unleashing: Orchestrating the loss of control of thousands of people moving in the desired direction.

Becky Margiotta
Joe McCannon
Intrinsic Motivation

Intrinsic Motivation: Doing something for inherent satisfaction that engaging in the activity provides.

Richard Ryan

Edward Deci
Extrinsic motivations – if you do this, you get that – often do not work or cause harm

Rewards and incentives mostly have the reverse affect on outcomes
Technical v. Adaptive Challenges

- People respond to extrinsic motivation when doing technical, mechanical tasks
  - Compliance or incentives work when activity is technical
- Most improvement work = adaptive challenges
  - Here solutions lie in new attitudes, competencies, coordination of people affected by the problem
  - Commitment works when activity is adaptive
Fear-driven motivation is not as generative or sustainable as intrinsic motivation.

To build it, we must understand what truly matters to stakeholders.

When what matters is honored, it limits the fears associated with change because it makes people more likely to see and experience an improvement’s fundamental value.
To unleash intrinsic motivation, we ask:

What matters to you? Why?

This limits the fears associated with change because it helps people see and experience its intrinsic value.
Public Narrative

[Diagram showing a cycle with 'self', 'now', 'us', and 'community' connected by arrows labeled 'purpose' and 'urgency'.]
Public Narrative

A leadership skill through which we [intrinsically] motivate others to join us in action.

Source: Ganz, *What is Public Narrative?*
What makes a story?
Challenge – Choice – Outcome
AGENCY INHIBITORS

AGENCY: THE EMOTIONAL CAPACITY TO MAKE MINDFUL CHOICES TO ACT PURPOSEFULLY

AGENCY MOTIVATORS

Inertia  Apathy  Fear  Isolation  Self Doubt

URGENCY  ANGER  HOPE  SOLIDARITY  YCMD

Stories

Stories

Stories

Stories

Stories
Video: Maureen Bisognano

https://youtu.be/sEIBJsHrU4c
Coaching Narrative

- When did you feel something in the story?
  - “I felt something when…”

- Did you hear a challenge? A choice? An outcome?
  - When explicitly? How could each made clearer?

- What values did the choice points demonstrate?

- What images brought the story to life?
  - How to “show” rather than “tell”?

- How effective was the ask?
Tips: Crafting an Effective Narrative

- Specific names
- Specific images
- Specific sound
- Specific smells
- Specific moments
## Story of Self – Pitfalls to avoid

### DO:
- ✓ Share experiences.
- ✓ Pick 1-2 choice points that relate to your calling to be here today.
- ✓ Tell a personal story, in which YOU are the main character.
- ✓ Be specific, vivid, clear...see it, hear it, feel it.
- ✓ Share what gives you HOPE!

### DON’T:
- X Give your resume.
- X Tell your whole life story from birth to now.
- X Tell a story about the issues only.
- X Be abstract.
- X Make it all about the nightmare.
Breakout agenda: 15 min.

1. Silent reflection. (5 min)
   - What calls you to lead improvement work? Why does it matter to you?

2. Person 1 shares story; Person 2 coaches. (5 min)

3. Switch! (5 min)
“There are two elements of prophetic vision. One is criticality, recognition of the world’s pain. Second is hope, recognition of the world’s possibilities.”

-Walter Brueggemann
Other Tools to Unleash Intrinsic Motivation

- Incorporate motivational task design
- Work in your / your team’s ‘Zone of Genius’
- Play & celebrate
- Create ‘Joy in Work’
- Ask the ‘five whys’ when exploring ‘what matters’
- Eliminate sources of extrinsic motivation
  - Professionalism, Performance & the Future of Physician Incentives:
    - [https://jamanetwork.com/journals/jama/fullarticle/2716969](https://jamanetwork.com/journals/jama/fullarticle/2716969)
Motivational Task Design

Source: Motivation through the Design of Work: Test of a Theory, Richard Hackman, Greg Oldham
Relationship to Other Domains

- **Co-produce in authentic relationship**: We elicit others’ & share our own stories re: what matters
- **Distribute power**: When tension arises, our people draw on intrinsic motivation to stick with it together
- **Co-design people-powered change**: For co-design to work, we must understand what matters to people
- **Adapt in action**: We design actions to motivate people on the basis of their intrinsic values
Co-Produce in Authentic Relationship
Objectives

• Explore what we mean by co-produce in authentic relationship
• Understand how co-producing in authentic relationship activates people’s agency
• Learn tools to co-produce in authentic relationship
Co- Produce in Authentic Relationship

Change is co-produced when people inquire, listen, see, and commit to one another.

Recommended Practices

1. Practice One-to-One Meetings
2. Ask Open and Honest Questions
3. Practice Appreciative Inquiry
4. Listen Deeply

Co-Production

- **Elements of Co-Production:**
  - Providing an opportunity for growth and development
  - Treating people as assets, not burdens
  - Building emotional intelligence and capacity of local communities
  - Minimizing the distinction between producers of services and consumers of services
  - Giving real responsibility, leadership, and authority to end users

Source: New Economics Foundation, Co-Production: A Manifesto for Growing the Core Economy
Co-production happens in authentic relationships.
What does authenticity mean to you?

What does it enable in a relationship?
How exactly do we elicit and demonstrate authenticity?
Authentic relationships are fostered as people inquire, listen, see, and mutually commit to each other.
The One-to-One Meeting

1. Selection & attention
2. Purpose
3. Exploration
4. Exchange
5. Commitment
Whom shall I ask?

Use your actors map to identify whom to build relationships with

Be clear about why you want to speak to them

Explain how you got the person’s name and common connections
The One-to-One Meeting

1. Selection

2. Purpose

“Hello, I am here to...”

Build a new relationship, deepen an existing relationship, or renew / redefine a relationship

Clarify your interest and purpose in meeting

Confirm the length of time to speak

Project enthusiasm & appreciation
The One-to-One Meeting

1. Selection

2. Purpose

3. Exploration

Ask WHY questions to elicit **values**

Explore shared **interests**

Listen for **assets**

Use **open & honest questions**

Tip: 80% listening / 20% sharing
Reframing the Question

From:
- How can I get all these people to do what I want them to do?

To:
- How can I get all these people to do what they want to do?
Step 3: Exploration with Authenticity

- Listen deeply
- Ask open honest questions
- Elicit & share narratives
- Cultivate Habits of the Heart
The One-to-One Meeting

1. Selection
2. Purpose
3. Exploration
4. [Mutual] Exchange

How can we be helpful to each other?
Strategize about exchanges of assets to enable both people to achieve shared goals
What are our next steps?

Frame commitment as opportunity
Be specific about what we commit to (who will do what by when)
The One-to-One Meeting

1. Selection & attention
2. Purpose
3. Exploration
4. Exchange

NO COMMITMENT
Research from the sales industry:
How many **NOs** should we be seeking to get?

- 2% of sales are made on the first contact
- 3% of sales are made on the second contact
- 5% of sales are made on the third contact
- 10% of sales are made on the fourth contact
- **80% of sales** are made on the **fifth to twelfth** contact

Credit: Helen Bevan, Go for No!
Key #1: Instead of Avoiding Rejection... Increase It!

It’s called “Go for no!”
Key #2: Don’t Take It Personally – It’s Not About You!

Hmmm… I think it’s time to go for no!
Key #3: Respond Positively – Don’t Act Badly.

You’re amazing. How do you do it?!

Go for no!
Key #4: Instead of Avoiding Rejection, Increase It!

How many no’s should I try for this week?
It’s a practice! We can improve it!
Fishbowl Example

Kate Hilton  Participant
The One-to-One Meeting

1. Selection & attention
2. Purpose
3. Exploration
4. Exchange
5. Commitment
Breakout agenda: 20 min.

1. Form a group of four.
2. Person 1 uses the five steps to lead a one-to-one meeting with Person 2. (10 min)
   • Meanwhile: Person 3 leads with Person 4
3. Swap partners! Person 2 uses the five steps to lead a one-to-one meeting with Person 3. (10 min)
   • Meanwhile: Person 4 leads with Person 1

Purpose: Use the 1:1 meeting to find out what this person values about improvement; see if there is an exchange around supporting each other’s learning re: the psychology of change.
Types of Questions to Ask

- **Values**: Why did you decide to participate in this Quick Course? Why does it matter, and why does it matter to you?
- **Interests**: What are you interested in learning? What has been helpful so far? Why?
- **Assets**: What strengths and experiences do you bring?
- **Mutual exchange**: Articulate where you see an authentic opportunity to exchange assets.
- **Commitment**: Solidify any next steps as clear commitments.
Debriefing the Five Steps

• What is the value of building relationships this way?

• How does it differ from other approaches?

• In what settings can you use the five-step process of a 1:1 meeting?
Power is not something you HAVE. It's a relationship with others.
Activating Agency

“Psychology of change” refers to the conditions that activate people’s agency to act purposefully.

Co-producing in authentic relationship: Change is co-produced when people inquire (openly and honestly), listen (deeply), see and mutually commit to one another.

Co-production: building “power with” through authentic relationships that result in mutual commitments.
Relationship to Other Domains

- **Unleash Intrinsic Motivation**: inviting people to voice values and experiences through open honest questions, listening, seeing, appreciative inquiry

- **Distribute power**: valuing otherness, mutual commitment in 1:1 meetings

- **Co-design people-powered change**: the second part of co-creation is in the ideation of change itself

- **Adapt in action**: holding tension in relationship, staying open and honest in situation and with each other, listening to what wants to happen
Other Tools

• Appreciative Inquiry
• Motivational Interviewing
• Story Sharing
• Non-Violent Communication Methods
• Understanding Emotions Exercise
Lunch: Invitation to speak to Kate & Alex about bike rack & feedback
Share Your Experience Today

Share your Quick Course experiences on Twitter and tag: @TheIHI @KateBHilton @Alexanderhander #IHIForum #PsychologyOfChange
Let’s conduct an RCT over lunch!
Randomized Coffee Trial!
Purpose of optional lunch activity

- To learn from an organizational change management strategy for building authentic relationship
- Practice open & honest questions, deep listening and the Habits of the Heart in a one-to-one meeting
Outcomes of Randomized Coffee Trials

Connecting Nesta over coffee

Week 0

Week 15

Number of other departments staff have connected with

How to create a culture of serendipity. Nesta’s Randomised Coffee Trial generated hundreds of new connections in four months.
Optional: Randomized Lunch Trial

- Let us know if you’d like to participate
- You will be randomly assigned to another learner in the room to eat lunch together
- Have an open ended conversation to learn about each other
- Practice tools to co-produce in authentic relationship!
Lunch Agenda

- Set up & find your partner (5 min)
- Get lunch, use bathroom (15 min)
- Randomized lunch trial (30 min)
  - May choose to sit and eat, or to walk and talk
  - You co-design the purpose of the meeting
- Break (10 min)
  - Pairs may build this into your lunch as you see fit

Please be back by 1:00 pm and sit at a new table!
New Table: Introductions!

In one breath, tell the people at your table:

- Who you are
- Where you’re from
- One key insight from this morning
- Whatever else you can fit in!
Distribute Power
Objectives

- Explore what we mean by distribute power
- Understand how distributing power activates people’s agency
- Learn tools to distribute power
Distribute Power

People can contribute their unique assets to bring about change when power is shared.

Recommended Practices

1. Create a Shared Purpose
2. Develop Distributed Leadership
3. Establish Working Agreements
4. Cede Power

Psychology of Change

AGENCY

The ability of an individual or group to choose to act with purpose

Power

The ability to act with purpose

Courage

The emotional resources to choose to act

Power: Martin Luther King, Jr.

Power is the ability to achieve purpose.
POWER is not something you HAVE. Its a relationship with others.
We have to accept the reality of our systems and take responsibility to improve them.
A brief overview of Power

- Power is held at several levels
  - Individual
  - Interpersonal
  - Institutional and Systemic

- Power distribution – or, how we arrived where we are – is not an accident
Systems of Oppression
Cultural values and habits which support the oppression of specific groups of people by people and groups in power. These values and habits are represented by the institutions, policies, and practices throughout society.

Intersectionality
A description of the way that multiple oppressions are experienced

Sources: Systems of Oppression, Just Conflict; Intersectionality, Kimberlé Crenshaw
Levels of Oppression

- Structural
  - Linguistic Oppression
  - Racism
  - Genderism
  - Sexism
  - Elitism
  - Ableism
- Institutional
- Interpersonal
- Individual

Oppression Types:
- Classism
- Ageism
- Colorism
- Xenophobia
- Religious Oppression
- Heterosexism
The -isms

______ Prejudice + Power

Norms, structures, policies, practices that advantage one group over another.

Differential access to goods, services, and opportunity of society by race.

People’s institute for survival and beyond (PISAB)
Phyllis-Jones, AJPH
One Example

Racism
A system of advantage based on race. Racism = Racial Prejudice + Power

Race
Socially constructed way of grouping people with no genetic or scientific basis. Used to justify social and economic oppression of people of color by Whites.
If you have come here to help me, you are wasting your time.

But if you have come because your liberation is bound up with mine, then let us work together.
Accepting reality before distributing power

- We all have varying amounts of prejudice
  - True for race, sex, gender, income, ability, beliefs, and all of the other characteristics that make us who we are

- We all have varying amounts of power

- We need to take responsibility for how our prejudices combine with our power to create power imbalances.
Distributing Power

Many people across group boundaries and levels within a system together creating the conditions to accomplish shared purposes
Other Leadership Models

“Hail Caesar!”
#Hierarchy4Eva

“Who’s in charge here?”
#NoOneALeader

“I’ll take care of it.”
#TheLoneRanger
Snowflake Model of Distributed Leadership

- Leadership is distributed
- No one person or group of people holds all the power
- Responsibilities are shared
- Everyone is responsible for developing leadership
Advantages of Distributed Power

- Distributes the work to achieve aims
  - Break an audacious goal into achievable chunks across teams
  - Offer multiple entry points for people to join

- Builds capacity for sustainability
  - Collective decision making process
  - Distributed facilitation of work

- Develops our people’s leadership
  - Create opportunities for leadership by delegating
  - Support people with training and coaching
Distributed Leadership

Teams organized by function, geography or task
Distributed Leadership

Mutuality: Bottom-up & top-down
Distributed Leadership

On-ramps for new leaders
As a change agent, my **centrality in the informal network** is more important than my **position in the formal hierarchy**.
What’s the Evidence?

The failure of large scale transformational change projects is rarely due to the content or structure of the plans that are put into action. To make transformational change happen we need to connect networks of people who ‘want’ to contribute.

It’s much more about the role of informal networks in the organisations/systems affected by change.

To make transformational change happen we need to connect networks of people who ‘want’ to contribute.

Source: David Dinwoodie (2015)
People who are highly connected have twice as much power to influence change as people with hierarchical power

Leandro Herrero

http://t.co/Du6zCbrDBC
3% of people in an organisation or system typically influence 85% of the other people.

Source: Organisational Network Analysis by Innovisor
John Kotter’s “Dual Operating System”

Organizational systems

Organizations comply with standards & protocols to meet goals around productivity & efficiency

Five principles at the heart of the “dual system”

1. Many change agents
2. A “want-to” and “get-to” – not “have to” – mindset
3. Leaders engaging the head and the heart
4. Much more leadership
5. Two systems, operating simultaneously
Jeremy Heimans, Henry Timms

This is New Power

old power

new power

Currency
Held by a few
Pushed down
Commanded
Closed
Transaction

Current
Made by many
Pulled in
Shared
Open
Relationship
What holds us back from distributing power?
What holds us from back from distributing power?

1. Fear of NO
2. We can do it better or faster by ourselves
3. Perfectionism: fear of mistakes
4. Not wanting to hold people accountable
5. Fear that others are not up to the task
6. Lack of trust and fear of letting go of control
What holds us from back from distributing power?

1. Fear of NO
2. We can do it better or faster by ourselves
3. Perfectionism: fear of mistakes
4. Not wanting to hold people accountable
5. Fear that others are not up to the task
6. Lack of trust and fear of letting go of control

Amy Edmondson: “The role of fear in hierarchy is ages old. Fear has long been used as a tool for maintaining control. If people lower in the hierarchy are afraid of those who have power, it stands to reason that they will do what they are supposed to do. But fear has profound limits…”
Psychology of Change

AGENCY

The ability of an individual or group to choose to act with purpose

Power
The ability to act with purpose

Courage
The emotional resources to choose to act

What Is The Implication?

- We all set the tone and create conditions for people to be courageous
  - We implicitly and explicitly send cues about what kind of behaviors are acceptable / unacceptable
- We have a responsibility to create safety to enable people to exercise courage
How to Create Conditions to Distribute Power

- Co-create a shared purpose
- Identify structures, roles and responsibilities designed for interdependence
- Recruit people from historically marginalized identity groups
- Recruit people who demonstrate empathy
- Set explicit working agreements that are mindful of power dynamics
- Conduct reverse performance reviews & reverse mentoring
- Co-create agendas; co-facilitate meetings; crowd-source ideas
- Rotate team meeting roles; change seating, space or time for team meetings to accommodate different people
- Celebrate when power is ceded
How to Create Conditions for Courage & Psychological Safety

- Be accessible & approachable
- Acknowledge limits of current knowledge
- Be willing to display fallibility
- Invite participation
- Use direct language
- Set boundaries about what is acceptable
- Highlight failures as learning opportunities
- Hold people accountable for transgressions in fair & consistent way

Amy Edmondson, *Teaming: How Organizations Learn, Innovate & Compete in the Knowledge Economy*, “Making It Safe To Team,” p. 139
"Heart" comes from the Latin *cor* and points to the core of self, that center place where all of our ways of knowing converge.

"Courage" also comes from *cor*. When all that we understand of self and world comes together in the center place called the heart, we are more likely to find the courage to act humanely on what we know.
The roots of courage are in

- Knowing ourselves
- Creating circumstances in which others can become more self aware and self-knowing
- Being in relationship with whatever is happening around us, i.e. open to reality as it appears
- Choosing to live undivided, in the integrity of ourselves, each other and life itself
Person 1: Think of a time when you exercised courage to distribute power, particularly in an improvement context. It could be a large or a small moment. Where were you? What were you doing? What motivated you to be courageous? What or who challenged you? What or who supported you? (5 min)

Person 2: Deep listening, open & honest questions

Switch!
Tools to Distribute Power

- Co-create a shared purpose
- Identify structures, roles and responsibilities designed for interdependence
- Recruit people from historically marginalized identity groups
- Recruit people who demonstrate empathy
- Set explicit working agreements that are mindful of power dynamics
- Conduct reverse performance reviews & reverse mentoring
- Co-create agendas; co-facilitate meetings; crowd-source ideas
- Rotate team meeting roles; change seating, space or time for team meetings to accommodate different people
- Celebrate when power is ceded
Relationship to Other Domains

- **Unleash intrinsic motivation**: Agency is motivational.
- **Co-produce in authentic relationship**: Values diversity & otherness, holds tension.
- **Co-design people-powered change**: Mutuality in distributing power for effective co-design.
- **Adapt in action**: Many on-ramps to join and scale, learn from simultaneous tests of change across snowflake.
Co-Design People-Driven Change

And Putting It All Together!
The Scale of the Challenge:

• “We believed the checklist would be the solution – but instead it served as a tool that helped us understand the scale and difficulty of the problem.”
• The sheer number and types of surgical defects required hundreds of people working on the problem together
• Previously tried multiple approaches: awareness raising, marketing, compliance – with limited results

How to solve this problem when it required surgeons, technicians, nurses, leadership, institutional support to change behavior?
Common Barriers to Change

- Power struggles
- Lack of buy-in
- Few or no results early on
- Need to adapt to new contexts
- Too much change at once
- Maintaining motivation
- Competing demands
- Opposition within ourselves
- Perverse incentives
- Fear of failure, rejection, job loss
- Confusing strategies
- Over-controlling leadership
- One-way communication
- Poor workforce planning
- Stifling innovation
- Playing it safe
- Poor management
- Undervaluing staff
- Inhibiting environment
- Extrinsic motivation only
Co-Design

When all the people affected by the improvement are *designed with* instead of *designed for*. 
Aim Setting

How good? By when?

We will do *(WHAT – aim)*
by *(HOW – measures)*
by *(WHEN – timeline)*

(Whose aim is this?? Who are “we”?)
Operation Safe Surgery

**Aim:**
Safe surgery of every patient, every time through 100% use of surgical safety checklist (brief, time out, debrief) within six months.
Wait a second... where are our people?

Let’s *people-ify* our aim statements!
People-Driven Aim Statements

We ____________ (WHO – frontline staff)________________________

are co-designing (WITH WHOM – patients, families)____

to do ____________ (WHAT – aim)________________________

by ____________ (HOW – measures)________________________

in order to _____ (WHY – intrinsic motivations)____________

by ____________ (WHEN - timeline)________________________.
Who Are Our People?

- **Constituency**
  - Leadership

- **Support**
  - Individuals & organisations

- **Competition**
  - Individuals & organisations

- **Opposition**
  - Individuals & organisations

**Shared Values**

**Opposed Values**
Let’s Map!

Constituency:
- The people at the center of our work, who we bring together
- Those with lived experience of the problem, with the agency to solve it – and keep it solved
Dr. Rose’s Map of Actors

Dr. Rose’s Leadership Team

Constituents:
• Surgeons
• OR Nurses
• OR Technicians
• Anesthesiologists
• Patients

Supporters:

Competition:

Opposition:
Operation Safe Surgery

**Aim:** I am co-designing with surgeons, nurses, technicians, anesthesiologists, other staff, and patients to achieve safe surgery of every patient, every time through 100% use of surgical safety checklist (brief, time out, debrief) within six months because our patients’ lives and quality of care depend on it.
Let’s Map!

Leadership:
- Derived from members of our constituency
Dr. Rose’s Map of Actors

**Dr. Rose’s Leadership Team**
- Dr. Rose, VP Surgery
- Keith Torgerson, Chief CRNA
- April Howell, OR Nurse
- Dr. Joe Dunlap, Surgeon
- Dr. Ben King, Anesthesiologist
- Gerry Rosenlund, Board of Trustees

**Constituents:**
- Surgeons
- OR Nurses
- OR Technicians
- Anesthesiologists
- Patients

**Supporters:**

**Competition:**

**Opposition:**
Operation Safe Surgery

**Aim:** We (Mike, Keith, April, Joe, Ben & Gerry) are co-designing with surgeons, nurses, technicians, anesthesiologists, other staff, and patients to achieve safe surgery of every patient, every time through 100% use of surgical safety checklist (brief, time out, debrief) within six months because our patients’ lives and quality of care depend on it.
Let’s Map!

Supporters:
- People whose lives are not directly affected by our work but who find it in their interest to support it
Dr. Rose’s Map of Actors

**Dr. Rose’s Leadership Team**
- Dr. Rose, VP Surgery
  - Keith Torgerson, Chief CRNA
  - April Howell, OR Nurse
- Dr. Joe Dunlap, Surgeon
- Dr. Ben King, Anesthesiologist
- Gerry Rosenlund, Board of Trustees

**Constituents:**
- Surgeons
- OR Nurses
- OR Technicians
- Anesthesiologists
- Patients

**Supporters:**
- CEO of Hospital
  - Gerry Rosenlund, Board Member

**Competition:**

**Opposition:**
Let’s Map!

Competition:
- Individuals and organizations with whom we share interests but have different ideas about how to achieve our goals
Let’s Map!

Opposition:

- Individuals and organizations whose values and interests oppose ours
Dr. Rose’s Map of Actors

**Dr. Rose’s Leadership Team**
- Dr. Rose, VP Surgery
- Keith Torgerson, Chief CRNA
- April Howell, OR Nurse
- Dr. Joe Dunlap, Surgeon
- Dr. Ben King, Anesthesiologist
- Gerry Rosenlund, Board of Trustees

**Supporters:**
- CEO of Hospital
  - Gerry Rosenlund, Board Member

**Constituents:**
- Surgeons
- OR Nurses
- OR Technicians
- Anesthesiologists
- Patients

**Competition:**
- Other QI efforts

**Opposition:**
- Laggard Surgeons
Who Are Our People?

Values: What matters to you? Why?

Interests: What do you stand to gain (or lose)?

Assets: What do you bring?
OURSELVES
(Dr. Rose)
OURSELVES
(Dr. Rose)
OURSELVES (Dr. Rose)

INTERESTS

VALUES

ASSETS
OURSELVES (Dr. Rose) VALUES ASSETS

VALUES

INTERESTS

OUR PEOPLE (April) VALUES ASSETS

INTERESTS
1. What change do we want? (What is our interest?)

- OURSELVES (Dr. Rose)
- OUR PEOPLE (April)
- INTERESTS
- ASSETS
- VALUES
1. What change do we want? (What is our interest?)

2. Who has the assets to create that change?
1. What change do we want? (What is our interest?)

2. Who has the assets to create that change?

3. What does she want? (Power with: What is their interest? Power over: What is their vulnerability?)

OURSELVES (Dr. Rose)

VALUES

OUR PEOPLE (April)

ASSETS

INTERESTS

INTERESTS
1. What change do we want? (What is our interest?)

2. Who has the assets to create that change?

3. What does she want? (Power with: What is their interest? Power over: What is their vulnerability?)

4. What assets do we have that they want?

OURSELVES (Dr. Rose)

VALUES

OUR PEOPLE (April)
1. What change do we want? (What is our interest?)

2. Who has the assets to create that change?

3. What does she want? (Power with: What is their interest? Power over: What is their vulnerability?)

4. What assets do we have that they want?

Commitment Based On Mutual Exchange

OURSELVES (Dr. Rose)

VALUES

OUR PEOPLE (April)

Commitment Based On Mutual Exchange
POWER is not something you HAVE

It's a relationship with others
Distribute Power

Trustees & Senior Leaders

Surgeons

Anesthesiologists

OR Nurses & Technicians

Dr. Michael Rose

Dr. Ben King

April Howell

Dr. Joe Dunlap

Gerry Rosenlund

Trustees & Senior Leaders
Relational Strategy

Leadership Team

100% use of checklist

1:1 meeting & training

Core team

1:1 & OR team meetings

Daily narratives

Time
Dual Operating System

The people involved (nurses, surgeons, technicians) worked together in the OR in accordance to a hierarchy.

Yet they built an informal network around the use of the surgical safety checklist.

This network of people who ‘wanted’ to contribute built power to diffuse the innovation past a tipping point.

Source: David Dinwoodie (2015)
Rate at Which Change Spreads: People

- **Innovators**: 2.5%
- **Early Adopter**: 13.5%
- **Early Majority**: 34%
- **Late Majority**: 34%
- **Traditionalists**: 16%

"THE CHASM"
Change

New actions or processes that are transparent and activate people’s agency.
Behavioral Change

Identify the *path to change*

Study bright spots

Appreciative inquiry: “What is working? And how can we clone it?”
The change solutions that emerge at the end of a co-designed process focus on the overlap of three criteria:

- Desirability
- Feasibility
- Viability

Workable for people
### From Compliance To Commitment

<table>
<thead>
<tr>
<th>From Compliance</th>
<th>To Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>States a minimum performance standard that everyone must achieve</td>
<td>States a collective goal that everyone can aspire to</td>
</tr>
<tr>
<td>Uses hierarchy, systems and standard procedures for coordination and control</td>
<td>Based on shared goals, values and sense of purpose</td>
</tr>
<tr>
<td>Threat of penalties/sanctions/shame creates momentum for delivery</td>
<td>Commitment to a common purpose creates energy for delivery</td>
</tr>
<tr>
<td>Based on organisational accountability</td>
<td>Based on relational commitment</td>
</tr>
<tr>
<td>“If I don't deliver this, I fail to meet my performance objectives”</td>
<td>“If I don’t deliver this, I let down YOU the group and our shared purpose”</td>
</tr>
</tbody>
</table>

Activating agency to act *voluntarily*: A “want to” versus a “have to” mindset.
Outcomes

- 100% of OR teams use the checklist/debrief at McLeod
- Mortality rate dropped by 35%
- Improved safety culture measures reported by surgical team members
- Economic return of 80,000 hours annually due to reduction of hours per case
- “No other approach more effective at culture change” – M. Rose
- Estimated 500 lives per year saved statewide
Reflections at McLeod Regional Health Center

“This helped us lead purposeful change amid a traditional culture of fear and domination. Before we had silos of expertise. Now we have a culture that is empowering to all involved.” – Keith Torgerson, Chief CRNA

“My biggest learning was how to influence without formal authority.” – Cindy Marshall, OR nurse
What lesson do you take away from this example?
Lessons

Psychology of change methods:
- Advance the adoption of quality improvement
- Are commitment-driven, not compliance-based
- Cultivate people’s agency to act increases joy, job satisfaction and improved health
- Build capacity that serves as an ongoing resource for addressing other problems
Other Tools

- Ethnographic Interviews
- Observation & Shadowing
- Empathy Walks
- Journey Maps
- ‘UFO’ discussions
- “Jazz-storming”
- Collective Process Mapping
Relationship to Other Domains

- **Unleash intrinsic motivation**: Inviting the people most affected by change to co-design it generates feelings of autonomy & meaningfulness.

- **Co-produce in authentic relationship**: Values diversity & otherness.

- **Distribute power**: Mutuality in distributing power for effective co-design.

- **Adapt in action**: Learn what is workable to people most affected by change.
Break (Last Call for RTC)

When you return, please sit at a new table!
Energizer!
Play

Implications of play:
- Build trust
- Invite authenticity
- Help people take risks & access courage
- Deepen imagination and creativity
New Table: Introductions!

In one breath, tell the people at your table:

- Who you are
- Where you’re from
- One key insight from this afternoon
- Whatever else you can fit in!
Putting It All Together
Adapt in Action
Acting can be a motivational experience for people to learn and iterate to be effective.

Distribute Power
People can contribute their unique assets to bring about change when power is shared.

Unleash Intrinsic Motivation
Tapping into sources of intrinsic motivation galvanizes people’s individual and collective commitment to act.

Co-Design People-Driven Change
Those most affected by change have the greatest interest in designing it in ways that are meaningful and workable to them.

Co-Produce in Authentic Relationship
Change is co-produced when people inquire, listen, see and mutually commit to one another.

Activate People’s Agency
Psychology of Change

AGENCY

The ability of an individual or group to choose to act with purpose

Power

The *ability* to act with purpose

Courage

The emotional resources to *choose* to act

Three Levels of Agency

- **Self**: An individual’s agency to make his or her own choices
- **Interpersonal**: The collective agency of people acting together
- **System**: The structures, processes, and conditions that support the exercise of agency within and across institutions and organizations

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Adapt in Action

Acting can be a motivational experience for people to learn and iterate to be effective.

Recommended Practices

1. Coach and Be Coached
2. Adopt a Growth Mindset
3. Fail Forward
4. Embrace Emergence

Unleash Intrinsic Motivation

Tapping into sources of intrinsic motivation galvanizes people’s individual and collective commitment to act.

Recommended Practices
1. Public Narrative
2. Motivational Task Design
3. Play and Celebrate

Co-Produce in Authentic Relationship

Change is co-produced when people inquire, listen, see, and commit to one another.

Recommended Practices

1. Practice One-to-One Meetings
2. Ask Open and Honest Questions
3. Practice Appreciative Inquiry
4. Listen Deeply

Distribute Power

People can contribute their unique assets to bring about change when power is shared.

Recommended Practices

1. Create a Shared Purpose
2. Develop Distributed Leadership
3. Establish Working Agreements
4. Cede Power

Co-Design People-Driven Change

Those most affected by change have the greatest interest in designing it in ways that are meaningful and workable to them.

Recommended Practices

1. Become Aware of Bias
2. Map Actors
3. Craft People-Driven Aim Statements

How will I apply these methods to my improvement work?

What will I try by next Tuesday?
How can I know that the psychology of change methods are having the desired impact on my improvement work?
Improvement Measures

Primary Measures
• Higher change adoption rates
• Increased sustainability of change

Secondary Measures
• Sustained integration of psychology of change methods over time
• Increased joy and satisfaction
• Higher discretionary effort
• Higher resiliency: lower burnout and “dropout”

Measuring Impact

Effectiveness of framework: compared with sites that have no experience with the framework, sites that have this experience should achieve greater, faster or more sustained improvements

Specific to improvement effort, for instance:

• Main measure outcome: # adverse drug events

• Rate of spread: # care units using unit briefings to identify medication safety issues

• Activity measures: # trainings held, # individuals who participate in improvement work, # core leaders
Measuring Agency

Example:

% of team members that respond “agree” or “strongly agree” on daily or weekly basis to:

“I feel able to contribute my knowledge & skills to advance our team’s shared purpose.”
Measuring Specific Domains

Quantitative Likert-scale measures:

• Intrinsic motivation: “How motivated are you to participate?”
• Co-design: “How involved were you in the design of this initiative?”
• Co-production: “How much do you feel that you are a part of something?”
• Distribute power: “How valued do you feel?”
• Adapt in action: “How ready are you to adapt as needed?”

Qualitative story harvesting, observational data, feedback
Applying the Psychology of Change to Measurement

- Co-design: Design measures with people affected by changes, based on measures that matter to them; identify biases around measurement & data analysis
- Intrinsic motivation: Make measurement fun by incorporating play and celebration
- Distribute power: Make data transparent
- Adapt in action: Only collect and track data used for learning, “fail forward” as adaptations of measurement strategy occur
- Co-produce: Share qualitative stories to connect data to people’s lived experience

What will I measure?
Adapt in Action
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Activate People’s Agency
Closing
Closing

- Celebration
- Next Steps
- Evaluation: pluses / deltas
What is your favorite way to celebrate accomplishments with your improvement team?
Elements of Celebration

**Storytelling**
- What we set out to achieve and why
- Naming our wins and losses
- Lifting up individual contributions and collective achievements
- Offering a hopeful vision and strategy for the future

**Values In Action**
- Inclusion
- Diversity
- Learning
- Building on strengths
- Leadership development

**Fun!**
- Music
- Pictures
- Games
- Beauty
- Food / drink
- Prizes
Important Components

Honoring and taking responsibility for what happened

- Posting the final score: celebrating the big win or failing forward
- Evaluating what happened in the work: pluses, deltas, key learning

Time to lift up & affirm the group and individuals

- Throwing a party: food, toasts, decorations, games
- Inclusive appreciation activities

Where are we heading?

- Sharing vision and plans for next steps
By way of celebration:

Please share a key insight from today
Next Steps

- Free optional check-in call: 12-1:30 pm ET on Wednesday, March 6, 2019
  - Kate & Alex will offer an update
  - You will share how you’ve applied the practices
  - We’ll coach each other!
- Invitation to write an IHI blog on your use of the psychology of change methods in your work
Things to Look Forward To

- *Healthcare Executive* article (i.e. white paper brief for executives) due January 2019
- Harvard Medical School Center for Primary Care Podcast in January 2019
  - [https://primarycare.hms.harvard.edu/rose-podcast/](https://primarycare.hms.harvard.edu/rose-podcast/)
- IHI Webcast: 2:30-4 pm ET on Wednesday, May 21, 2019

Stay tuned at [www.ihi.org/psychology](http://www.ihi.org/psychology)!
Evaluation

- Pluses: What did we do well and should continue to do?
- Deltas: What can we improve next time?
Gratitudes & High Fives
Thank you!

Kate B. Hilton, JD, MTS  
kate.b.hilton@gmail.com  
@KateBHilton

Invitation to check in with us about anything remaining on your bike rack or any feedback along the way!

Alex Anderson  
aanderson@ihi.org  
@Alexanderhander

@TheIHI #PsychologyOfChange
Appendix: Psychology of Change Playlist
Psychology of Change Playlist

- Try Everything, Shakira
- Give Love, Andy Grammer (feat. LunchMoney Lewis)
- I’m Only Human, Rag’n’Bone Man
- There’s Nothing Holding Me Back, Shawn Mendes
- Can’t Stop the Feeling!, Justin Timberlake
- What a Feeling, Flashdance

https://open.spotify.com/user/125132378/playlist/3KFcjkTLaWNITIM5deM4l0
Psychology of Change Playlist

- Another Brick in the Wall, Pink Floyd
- Things Can Only Get Better, D’ream
- Changes, David Bowie
- Wind of Change, Scorpions
- Beautiful Day, U2
- More Than A Feeling, Boston
- Stronger, Kanye West

https://open.spotify.com/user/125132378/playlist/3KFcjkTLaWNITIM5deM4l0
Psychology of Change Playlist

- One Love, Bob Marley
- Eye of the Tiger, Survivor
- Titanium, David Guetta
- Hooked on a Feeling, Blue Suade
- Somewhere Over the Rainbow, Israel Kamakawiwo’ole
- Best Day of My Life, American Authors

https://open.spotify.com/user/125132378/playlist/3KFcjkTLaNlTlM5deM4l0
Psychology of Change Playlist

- Chariots of Fire, Vangelis
- Believer, American Authors
- Look What You Made Me Do, Taylor Swift
- Imagine, John Lennon
- Roar, Katy Perry
- Man in the Mirror, Michael Jackson

https://open.spotify.com/user/125132378/playlist/3KFcjkTLaWNITIM5deM4l0