



HARVARD
MEDICAL SCHOOL

Accountability Leadership for the Health Care Team

October 22-27, 2017

Orientation Materials



**THE
LEVINSON
INSTITUTE**

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WELCOME!

To: **Accountability Leadership for the Health Care Team Participants**
From: Kathy Kozlowski
Date: July 2017

On behalf of Dr. Kraines and the Levinson Institute staff, I would like to welcome you to our October 22-27, 2017, **Accountability Leadership for the Health Care Team** seminar.

Our seminars have been designed to provide you with an intimate environment to reflect on new ideas and old practices, to meet new people, and to consider the nature of your relationships at work. Through our more than 40 years of experience and feedback from participants, we are certain that what we do will make a great week for you.

Like any seminar, however, there are many moving pieces, and planning is required between the triad of the participant, the Institute, and the hotel that is our base. In order for all to go as intended, we need you to review this entire packet to understand your accountabilities in relationship to the whole. We have included a timeline so that you can work backwards from October 22 and make the appropriate notations on your calendar.

 This packet is designed to give you all of the information you will need so that when you arrive you are confident that you are ready for the week. Please read the entire packet. If you have an assistant who helps you with logistics, please make sure that he or she has the entire packet as well.

Enclosed you will find:

1. A fact sheet
2. A timeline
3. The week's preliminary schedule
4. Required case work
5. Information about your individual interview
6. Transportation and hotel information

(continued)

The next page in this document is an important fact sheet. Please make sure you read it and then feel free to call our seminar staff at any time so that they can answer your questions.

We are looking forward to your week with us!

Contacts:

Cynsie Kraines
COO and Director of Training Programs
(800) 290-5735 or (617) 947-8391
ckraines@levinsonandco.com

Kathy Kozlowski
Seminar Coordinator
(800) 290-5735 or (603) 532-4700
kkozlowski@levinsonandco.com

FACT SHEET

WHERE AM I STAYING? The Double Tree Bedford Glen Hotel, 44 Middlesex Turnpike, Bedford, MA and the phone is (781) 275-5500. Levinson staff members will be making all of the hotel reservations. Please communicate with us at (800) 290-5735 or (603) 532-4700 regarding special needs, extra nights, etc. See page 12 of this packet for more about the hotel.

The hotel's URL is www.bostonbedfordglen.doubletree.com.

WHERE DO I FLY INTO? You can fly into either Boston's Logan International (BOS) or the Manchester-Boston Regional Airport (MHT). On average, both airports are about 40 minutes from the hotel. Please make your flight arrangements so that, on Sunday, you are checked in to the hotel before the reception and dinner, which begin promptly at 6:15 p.m. On Friday, the seminar ends by 11:30 a.m. If you make reservations to leave before 1:30 p.m. on Friday, you will miss important material around the seminar's completion.

HOW DO I GET TO THE HOTEL? See pages 11 and 12 for detailed transportation and hotel information.

WHAT AM I FINANCIALLY RESPONSIBLE FOR? Phone calls, room service, movies, and alcohol (outside of that provided) are all considered incidentals and will be charged to your personal credit card. All lodging, meals, tips, course materials, and instruction are included into the seminar fee. Please note that you are responsible for paying for any nights beyond Sunday through Thursday. Lunch on Friday is not included in the package price. If you have a late flight you will be responsible for your own lunch.

WHAT DO I WEAR? The week is casual. Jeans are fine; however, if you are more comfortable in business casual, that is fine, too. **BRING A WARM SWEATER AS THE MEETING ROOMS ARE OFTEN ON THE COLD SIDE AT ANY TIME OF THE YEAR.** Many participants have told us they wished they had paid more attention to this suggestion!

SEMINAR MATERIALS. You will be given a large three-ring binder in addition to other seminar print materials. You should allow extra room in your luggage to accommodate these materials. If you want to ship them home, make sure you bring a FEDEX number with you or you will need to use your own credit card number.

A SUNDAY REMINDER. Once you are in transit on Sunday, please let Cynsie Kraines know if you are having any problems with arriving for the start of the seminar. Cynsie's cell phone number is (617) 947-8391.

TIMELINE

- Today Read this document thoroughly now.
Make your airline reservations, etc.
- October 2 E-mail your written, "live," interpersonal case (and organizational chart) to Kathy Kozlowski at Levinson. Send it to kkozlowski@levinsonandco.com.
- October 12 Revisions to your case (if requested) are due. Please send them to kkozlowski@levinsonandco.com.
- October 22 Welcome reception and dinner will begin promptly at 6:15 p.m. followed by your small-group orientation.
Last-minute questions? Call Cynsie Kraines at (617) 947-8391.



SCHEDULE OF THE WEEK

A preliminary schedule grid for the week is on the next page. Your week will be comprised of morning interactive lectures and lots of discussion at your tables.

Afternoons will be a combination of lectures, small-group case work, individual interviews with your faculty small-group leader, and free time.

Where these activities fall depends on the numbers enrolled. Your actual schedule and roadmap for the week is prepared just before the seminar begins. As you can see, the case work is a predominant feature of the week, so spending the right amount of time and thought on your case is important. Please see pages 8 and 9 of this packet for more information about your case work and page 10 for more about individual time with your faculty leader.

On Wednesday evening, you will be free after the last small group. Usually this is a 6 p.m. finish. We will be asking you early in the week if there is something in particular you would like to do on Wednesday evening. Some people might like to go to a sporting event; tour the Museum of Fine Arts, Boston; or visit Boston's North End for some wonderful Italian food. Whatever your choice, we will be happy to help to arrange for transportation, if needed. However, we are finding that Uber and Lyft are more competitive than more conventional private car services.

Close to the hotel, there is a major shopping mall, the Burlington Mall, a large Barnes and Noble, and many restaurants. The hotel offers a free shuttle for guests for destinations within a five-mile radius. Many participants decide to have dinner at the hotel on Wednesday evening and give themselves some well-deserved rest and relaxation. This will be covered as part of your package; if you go out on Wednesday evening, it will not.

SMALL-GROUP CASE STUDIES

Overview

The small-group sessions are your opportunity to apply the learning of the week to actual problems you are confronting at work. Each small-group session is devoted to one participant's case. You will have the benefit of both your small-group facilitator and the other group members' input in discussing and analyzing your case.

Your case should be focused on a **process issue** that is of genuine concern to you. It is critical for the small group that your case is current, unresolved, and preventing you and others from being fully effective in meeting your accountabilities. We encourage you to be as candid as possible. All information is confidential and discussed only within your small group.



Important! If two or more participants are coming from your organization, you have three options: 1) to be in a separate small group with a separate case; 2) to be in the same small group with others from your organization, but with separate cases; or 3) to be in the same small group with a common case, which you will need to prepare in advance with other participants from your organization. Please advise Cynsie Kraines at ckraines@levinsonandco.com or (617) 947-8391 of your choice as this will have an impact on how we form the small groups.

Writing Your Case

Your case should be about a specific process or sub-process and you should be prepared to describe and discuss its **business purpose**. Please prepare a simple organizational chart showing the organizational structure—up to the most senior role that is accountable for every role that is part of the process issue. If your case has components that are outside of your own organization or hospital, please create a diagram that best reflects your understanding of the involved roles (e.g., two separate institutions that have roles working together). Cases can become quite complex. Having a visual roadmap for you and the group will be important for identifying and solving your case problem.

In writing your case, first describe the nature of the problem (how the different people involved in the process experience it) and its organizational and business implications. Next, describe the tasks and purpose of the process; the involved teams or roles, including their key inputs and outputs; and the reporting relationships that exist between you and the cast of characters.

Some examples of the kinds of cases you might wish to present are: a process involving a team or group of which you are a **member** or of which you are the **leader**; a problem in developing or planning a team initiative to work on a specific

process issue; or an inability to meet your accountabilities because of capability issues of colleagues or subordinates. **In thinking about your case, ask yourself about the people, the nature of your working relationships with them, and the organizational structure.** These will provide important clues to the root of the problem.

Your case should be at least one page (but not more than two pages) not including the organizational diagrams. **Please submit your case in Microsoft Word (not a PDF).** Only those participants who are assigned to your small group will get copies of your case. At the end of your small-group session, all copies of your case will be returned to you.

Please send your case to us at kkozlowski@levinsonandco.com no later than **Monday, October 2.** Cynsie Kraines will review the cases and she will notify you of your case status, either “good to go” or “needs some more work.” We will format all cases (for uniformity) and then duplicate your case for members of your small group. Thank you.

Additional Information

The following additional questions are offered as thought starters. Don’t try to answer all of them for your case. You may find these questions useful as a diagnostic instrument in the future.

1. What is the purpose of the team? What is its charge, its accountability? Has it been set up to accomplish a task, or is it an ongoing management team?
2. Are the roles and accountabilities of the people involved clear?
3. Describe the behaviors of those involved if they seem outside of normal limits.
4. Are there issues of commitment?
5. What organizational practices and norms affect the presenting problem?
6. How is conflict managed? Is it avoided, denied, or worked through?
7. How is leadership exercised? How do people relate to the leaders?
8. Are there effective procedures for working? Do people support the procedures?
9. How open are communications? Is information shared and is feedback part of the managerial culture? Can people express different ideas and respectfully disagree?
10. Does each employee understand how the organization sees him or her? Do employees feel there is a commensurate commitment to developing them?

YOUR INDIVIDUAL INTERVIEW

Each participant has a one-hour session with his or her small-group leader. This is a confidential coaching session and the content is up to you. It could be more about your case, another case, work-specific issues, or general career issues. Participants have long found the one-on-one sessions to be among the most productive and rewarding aspects of Levinson Institute seminars.

You will not receive any written report at the end of your coaching session. This is a verbal feedback session; however, you are welcome to take notes.

TRANSPORTATION INFORMATION

For transportation from Logan International Airport (BOS), you can make a reservation with The Coach Transportation or Flight Line. (See contact information below.) Many participants also choose to use Uber, Lyft, or take a cab.

The Coach Transportation takes credit cards. Coach Transportation's phone numbers are (877) 664-6967 or (781) 229-7979 and its e-mail address is thecoachtransportation@yahoo.com. Flight Line can be reached at (800) 245-2525 or info@flightlineinc.com. Keep in mind that Flight Line may be picking up multiple passengers and therefore, making multiple stops.

The Manchester-Boston Regional Airport (MHT) is a great alternative to Logan if you can get a direct flight there. It is small enough to easily navigate, which makes it a much more user-friendly environment than Logan.

From the Manchester, NH, airport, The Coach Transportation is significantly more expensive than Flight Line. Therefore, we recommend that you use Flight Line or Uber if you are going to that airport. Again, Flight Line can be reached at (800) 245-2525 or info@flightlineinc.com.

During the week, we will ask you to fill out a transportation sheet letting us know your departure time on Friday, your preferences for the amount of time at the airport prior to your flight, whether you want to ride alone so you can catch up on work, etc. The on-site coordinator will attempt to group you into cars so that the fixed fee can be shared among a number of passengers.

If you are taking Amtrak to Boston, there are no stops close to the hotel. Cabs from Boston's South Station should be taken to the hotel. If you are public-transportation savvy and don't have a huge amount of luggage, then you can continue on the T (Boston's public transportation system) to the Red Line Alewife Station (which is the closest to the hotel) and take a cab from there.

Check out www.bostonbedfordglen.doubletree.com for driving directions from all points.



HOTEL INFORMATION



Double Tree Bedford Glen Hotel, 44 Middlesex Turnpike, Bedford, MA 01730
(781) 275-5500

The Double Tree Bedford Glen Hotel, www.bostonbedfordglen.doubletree.com, has been our seminar hotel for almost 25 years. Through three ownerships and two major refurbishing efforts, we have chosen to keep our people under this roof.

The hotel staff specializes in conferences. They know how to make you and other participants feel at home so that you can focus on the work of the week.

There are outdoor patios; a swimming pool; a small, but efficient, gym; and food that is way above average.

Each guest room has Internet access, a flat-screen TV, and an ergonomic chair for sitting at the desk.

Directions for getting to the hotel can be found below and we strongly suggest that you print these out and have them with you if you decide to take a cab from the airport. Boston area cab drivers may not be familiar with the area north of the city. (One key marker for them is to say that it is on Middlesex Turnpike, the same road as the Burlington Mall.) The hotel explains in great detail how to navigate to its doors.

From the hotel's website:

From Logan International Airport: Go through the Sumner Tunnel and take I-93 North. I-93 North to exit 37B (I-95 South/ Route 128 South). Follow I-95/Route 128 South to exit 32B (Middlesex Turnpike). Turn right off of the ramp onto Middlesex Turnpike and follow straight for 2.7 miles passing the Burlington Mall on the right. The hotel will be on the left hand side across the street from the Hampton Inn.

From Manchester, NH Airport: Make a right out of the main entrance on to Brown Ave. Follow for approx. $\frac{3}{4}$ of a mile and take Route 293 North. Take 293 North to the Everett Turnpike. Continue onto the Everett Turnpike Southbound and eventually it will turn into Route 3 South. Follow Route 3 South and take exit 26 (Route 62 exit, Bedford, Burlington). Turn left at the bottom of the ramp onto Burlington Road (Route 62). At the third traffic light take a left onto Middlesex Turnpike. The hotel will be in 0.8 miles on the left hand side across the street from the Hampton Inn.