Integrated leadership for physicians, health care executives, hospitals and health systems

National conference series
Panel members

John Combes, MD, Senior Vice President, Chief Medical Officer
American Hospital Association

Jim Rohack, MD, Senior Advisor
American Medical Association

Pam Thompson, MS, RN, Chief Executive Officer Emeritus
American Organization of Nurse Executives

Liz Summy, Executive Vice President, Chief Operating Officer
American College of Healthcare Executives

Peter Angood, MD, President, Chief Executive Officer
American Association for Physician Leadership
 Integrated leadership

- Collaborative discussions between AHA and AMA
- Opportunity to redefine care delivery to achieve the Triple Aim through new care and payment models
- Many organizational models are successful, but essential to those is a structure with **collaborative and integrated leadership** between physicians, nurse executives, health care executives and hospitals.
Background of the initiative

- Proceedings from the Joint Leadership Conference published in April 2014.
- Health Affairs Blog post published in April 2014.
- AHA - AMA Expanding the Physician-Hospital Integrated Leadership meeting published in October 2014.
- AHA and AMA begin collaboration with AAPL, ACHE and AONE in October 2015.
What is successful integrated leadership?

- Requires functional partnership between organized physicians, nurse executives, health care executives and hospitals

- Requires capability to accept and manage clinical and financial risk, improve quality and reduce cost

- Management decisions on quality improvement and population health agenda should be made jointly between physicians, nurse executives, health care executives and hospitals
1. Physician and hospital leaders with:

- shared vision and mission
- similar values and expectations
- aligned financial and non-financial incentives
- goals aligned across the board with appropriate metrics
- shared focus on engaging patients as partners in their care
- shared responsibility for financial, cost, and quality targets
- service line teams with accountability
- shared strategic planning and management
2. An interdisciplinary structure that supports collaboration in decision-making, preserving clinical autonomy (defined as putting the needs of the patient first) needed for quality patient care while working with others to deliver effective, efficient and appropriate care.
3. Integrated leadership at all levels and participation in key management decisions
   - Teams accountable to and for each other and can commit for each other
   - Teams of clinicians and administrators leading together at every level
Integrated Leadership for Hospitals and Health Systems: Principles for Success

4. A collaborative, participatory partnership built on trust
   - Sense of interdependence and working toward mutual achievement of the Triple Aim
   - Physicians and hospital leadership trust in each other’s good faith and abilities
5. Open and transparent sharing of clinical and business information by all parties across the continuum of care
6. Clinical information system infrastructure that allows capture and reporting of key clinical quality and efficiency performance data and accountability across the system to those measures
Key elements for the physician organization to organize under formal self governance and management

- Inclusive governance process overseeing competencies in quality management, practice efficiency, clinical discipline, clinical and financial risk management

- Process for leadership selection, support and training

- Structures outlining membership requirements, including professional conduct, clinical protocols

- Development and review of physician organization’s overall strategy and guidelines for employment or affiliation arrangements

- Leading in the adoption of clinical information technology and resources necessary for effective population and patient care management

- Robust member communication strategy and plan
Both physician and hospital leaders must possess the knowledge, skills and professional attitudes to be effective leaders and managers in empowerment-oriented, and consensus-based management models.

Physician leader skills

- Mission and strategy development, alignment and deployment
- Understanding of patient and consumer expectations
- Quality measurement and improvement
- Team building, negotiation and management
- Effective adoption of health care clinical information technology
- Risk, finance and cost management in various types of practice organizations
- Understanding payment based on care, quality, outcomes and accountability
- Population health management

Hospital leader skills

- Understand medical professionalism, care delivery processes and clinical decision making
- Knowledge of physician practice finances and workflow
- Ability to achieve consensus with physicians
- Understand need for physicians to advocate for patients
- Accept need for physician clinical decision autonomy in specific settings while expecting physician accountability for overall institutional success
- Willingness to create true integrated leadership model by sharing management responsibilities and accountabilities
Cultural needs: The way an organization does business that is predictable, known to all and consistent with mission and values

- A focus on health of entire population served by integrated health system
- Common mission, vision and values - serves as the touch point to help resolve the inevitable future conflicts
- Mutual understanding and respect despite different training and perspectives
- Sense of common “ownership” of integrated health system and its reputation
- Joint commitment to performance measurement and improvement
- Focus on individual patient’s care over time and across the continuum
- Performance data that is understandable, timely and trusted
- Fair financial and non-financial incentives aligned to improve care and manage costs across the organization
- Shared governance and involvement in decision making
- A sense of responsibility for the integrated health system
- Consensus decision making between all parties
Challenges to success

- Commitment to business model transformation
- Differing mind sets
- Lack of clarity on values
- Lack of more “accessible” and generalizable models of physician organization
- Lack of integrated leadership and management skills
- Need for robust of primary care involvement
- Need for payer partnering and new payment models
- Legal and regulatory issues
- Contractual issues
- Ancillary services issues
- Coordination of the organized medical staff
American College of Healthcare Executives

- Interdisciplinary membership
  - Healthcare executives, physician leaders, nurse leaders and other clinical colleagues
- Leadership development activities
  - Across the career continuum
  - Through multi-disciplinary education and networking
Healthcare executives should demonstrate competency in all five domain areas.

Source: ACHE Healthcare Executive Competencies Assessment Tool 2014©
Healthcare leadership core competencies

- Governance and organizational structures
- Human resources
- Finance
- Healthcare technology and information management
- Quality and performance improvement
- Laws and regulations
- Professionalism and ethics
- Healthcare
- Management
- Business
Meeting needs across the continuum of care
Emerging competencies for leading change

- Lead Communities
- Lead Organizations
- Lead Others
- Lead Self

Academic Preparation

Experience
Transformational skills

- Innovation
- Entrepreneurship
- Change leadership
- Business strategies and fiscal oversight
- Clinical integration
- Data analytics
- Emotional intelligence
- Coaching and motivating for performance
Triad leadership

Leader Models: Traditional vs. Distributed

Adapted from: Frontiers of Health Services Management Volume 32 (3) 2016. Physician Leadership: A Central Strategy to Transforming Healthcare by Randall D. Oostra, FACHE.
Change requires leadership

“Leadership and learning are indispensable to each other.” ~John F. Kennedy
Preparation is key

- 70% of behavior change takes place “on the job”
- 20% through people and connections
- 10% through education (workshops, applied learning)

Making it happen: 3 strategies

- Seek challenging assignments - get out of your comfort zone
- Seek experiential learning and practice
- Invite a mentor to keep you accountable
American Organization of Nurse Executives

Nurse executive competencies

- Communication & Relationship Management
- Professionalism
- Knowledge of Health Care Environment
- Business Skills and Principles
Communication and relationship building

A. Effective communication
B. Relationship management
C. Influencing behaviors
D. Diversity
E. Community involvement
F. Medical/staff relationships
G. Academic relationships
Knowledge of the health care environment

A. Clinical practice knowledge
B. Delivery models/work design
C. Health care economics and policy
D. Governance
E. Evidence-based practice/outcome measurement and research
F. Patient safety
G. Performance improvement metrics
H. Risk management
Leadership

A. Foundational thinking skills
B. Personal journey disciplines
C. Change management
Professionalism

A. Personal and professional accountability
B. Career planning
C. Ethics
D. Advocacy
Business skills

A. Financial management
B. Human resource management
C. Strategic management
D. Information management and technology
## American Association for Physician Leadership

### Leadership competencies

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<thead>
<tr>
<th>Communication and relationship management</th>
<th>Leadership</th>
<th>Professionalism</th>
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<tr>
<td>Collaborative function</td>
<td>Trust and respect</td>
<td>Accountability</td>
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<td>Develop relationships</td>
<td>Motivate others</td>
<td>Judgment</td>
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<td>Team building</td>
<td>Influence</td>
<td>Integrity</td>
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<td>Conflict management</td>
<td>Strategic perspective</td>
<td>Humility</td>
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<td>Critical appraisal skills</td>
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<td>Adaptability</td>
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Management skills

- Patient satisfaction, brand and product awareness, and communication strategies
- Governance, strategic planning and managing risk
- Operational performance management
- Workforce and talent management
- Finance, economics and payment
- Business intelligence and metrics
Changing skill requirements

- Personal leadership skills
- Management skills
- Technical skills

Relative Skill Importance

Low

High

Professional/Individual → Manager → Leadership
Nine essential elements for patient-centered care

- Quality-centered
- Safe for all
- Streamlined and efficient
- Measurement-based
- Evidence-based
- Value-driven
- Innovative
- Fair and equitable
- Physician-led
Integrated leadership for physicians, health care executives, hospitals and health systems

As this concludes our national conference series, we would like your feedback to ensure the National Summit on May 16-18, 2017, at the London House in Chicago will meet your needs.

1. What training/topics would be most helpful in developing leadership and management skills, for both the individual and team education?
2. What format(s) would be most helpful for education on how trust can be developed in integrated leadership teams?
3. How would you suggest the Summit address development of common values and open sharing of clinical and business information?
4. Should the Summit spend time discussing health information infrastructure?
Questions and Concluding remarks
AHA and AMA resources

- Integrated Leadership for Hospitals and Health Systems: Principles for Success
- Proceedings from the AHA-AMA Joint Leadership Conference on New Models of Care
- Webinar: AMA-AHA Integrated Leadership Principles
- Physician leadership education
- Blue Ribbon Panel Report: The governance of physician organizations
- Webinar: Physician Leadership Education 2.0
ACHE resources

- Education programs:
  - Clinical leadership
  - *Creating Readiness for Change: Preparing Physicians and Administrators for Collaboration*
  - *Creating a Leadership Development Program in Your Healthcare Organization* course
- Physician Executive Forum
- Publications
AAPL resources

- Leadership competencies
- Publications
- 100+ leadership and management courses
  - 4x live institutes
  - Customized distance education platform
  - Onsite leadership education forums
- Physician leadership assessment tools and careers services program
- Board certification by CCMM
  - Certified Physician Executive program
- Four masters degree programs with affiliate universities
- Variety of specialty certificate programs
- CMO and CEO academies
- Distance education specialty series (e.g. patient safety)
- Whitepapers, journal publications and books
AONE resources

- Nurse Executive Competencies and Assessment Tool
- Certification Exams:
  - Certified in Executive Nursing Practice
  - Certified Nurse Manager & Leader
- Education Programs:
  - Health Care Finance
  - Dynamic Leadership for Shared Governance
- Guiding Principles:
  - Excellence in Nurse/Physician Leadership
  - Future Patient Care Delivery
  - Mitigating Violence in the Workplace