



## **International Palliative Care Leadership Development Initiative**

An Initiative of the Institute for Palliative Medicine at San Diego Hospice  
Funded by a Grant from the International Palliative Care Initiative, Open Society Institute, New York  
with Additional Support Provided by the National Cancer Institute, Bethesda, Maryland, and  
The Diana, Princess of Wales Memorial Fund, London, UK

# Leadership Development Initiative Participant Guidelines

### **Overview**

The Institute of Palliative Medicine at San Diego Hospice is leading the International Palliative Care Leadership Development Initiative, (LDI) a challenging and innovative project that will advance palliative care globally. You are one of 22 emerging palliative care physician leaders, selected by the LDI team because you have already demonstrated leadership capability in your community and region. This is not an Initiative to advance clinical skills. Instead, it focuses on your intrinsic leadership strengths and takes a creative approach to optimize those strengths. We expect that you will directly benefit from the LDI; we also expect the LDI will be a watershed program to advance strategic development of palliative care leadership, and palliative care, regionally and globally.

### **Participant Opportunities**

During this structured 2-year Initiative, you will have a unique opportunity to:

- Further develop and strengthen your leadership skills and activities.
- Collaborate with a regional mentor selected for you
- Network with local mentors you identify, peers, and the LDI team
- Build relationships with global palliative care leaders, educators and clinicians

### **Developing Leadership Skills:**

The design of the LDI builds in several components: residential courses, periodic web-based educational programs, mentored development of your own detailed *Individual*

*Development Plan* and participation in chosen additional peer engagement and networking opportunities.

**Residential Courses:**

The first course will be in January 2010.

<b>Arrive by</b>	Jan 23, 2010 (Saturday)
<b>Welcome/orientation</b>	Jan 24, 2010
<b>Conference</b>	Jan 25 – 29, 2010
<b>Departure date</b>	Jan 30, 2010 (Saturday)

The locations and exact timing of Course #2 and #3 are not yet determined. Please save the first 3 weeks of November 2010 and 2011 on your calendar. As soon as these date and location details are known, we will immediately notify you.

Curricular details and design of the courses will follow.

**Ongoing Learning:**

To augment the residential course content, supplementary on-line educational resources will be offered to you. In addition to these, ‘assignments’ will be sent to you to foster your own personal reflections on your role, presence and development as a leader.

**Regional Mentors**

One of the most powerful and unique aspects of this Initiative is the relationship you will have with your Regional Mentor. The mentors are global leaders in Palliative Care, chosen for their expertise and credibility. They represent the best of clinical, educational and leadership role models in the field. In order to truly facilitate your growth, your regional mentor will be in frequent communication with you, and will be “walking-with” you throughout this Initiative. They will:

- review the pre-assessment information you submit
- facilitate and guide individual and group interactive sessions during the courses
- collaborate to develop your *Individual Development Plan (IDP)*
- participate with you in quarterly ‘check-in’ phone calls (SKYPE, phone, etc) to foster development, review and revision of your IDP throughout the initiative to help you reach your identified goals.
- engage with you as negotiated or needed, between quarterly reviews
- help you prepare for, and write annual reports and your end-of-initiative personal story (Final Project), if you need their assistance.

## **Precedent-Setting Pilot Initiative**

You are in the first of two cohorts included in this pilot Initiative. The curriculum and design of the Initiative is based on established content from Leadership Theory and models. There will be significant emphasis on your own personal characteristics and values. Leadership knowledge, skills, attitudes and behaviors begin from developing a clear and continuously refining vision of yourself, your role and influence. We recognize you come with a strong leadership background, and hope the LDI will augment these skills so that you will more effectively lead from your current situation to advance into progressively wider spheres, ie., nationally, regionally and globally.

## **Ongoing Evaluation**

One of the most important components of any pilot project is the evaluation and feedback that strengthens and consolidates the vision and goals. To that end, there will be frequent opportunities to provide feedback. We will rely on you to honestly express your experience of the course overall, of the content, the delivery, the faculty, your mentor and of yourself during your leadership journey. Your feedback will be very important. We will do our best to be responsive to your needs. We hope that together we will enrich and build a meaningful experience you, your peers, the LDI team, the mentors and faculty. The outcome we seek is the creation of a powerful new generation of Palliative Care Leaders who will serve as 'centers of excellence' and advance palliative care globally. Your thoughts and reflections, as you interact with the LDI 'community' will foster the next cohort, and all the participants to come.

## **Participant Commitment**

This is a multi-layered and rich opportunity for you to walk side-by-side with, and learn from, global leaders. We understand that you have busy lives, work and family responsibilities and many competing interests. You will need to invest a fair amount of time in the LDI and your leadership activities; you must commit to full attendance at the residential conferences, to the quarterly check-in with your mentor, to completing 'assignments', to working on and implementing your *Individual Development Plan*, to working with the LDI team and your own institution to bring your Leadership vision and your activities to fruition. Many of these aspects of the LDI are more fully described later in this document.

## **Pre-assessment Work**

In advance of the first meeting in January, you will be sent a number of survey tools to help you and the LDI team prepare. A 'situation analysis' template will be sent to you to complete. It is very comprehensive, and will serve to delineate the situation, palliative care resources and needs in your country. This situation analysis will also be shared with your regional mentor with the hope that together, the realities of your situation can be addressed, and remedies to strengthen and advance palliative care may be designed and included in your IDP.

### **Reading:**

Two books and several papers will be sent to you in advance of the first meeting. For personal leadership development, John C. Maxwell's

***Developing the Leader within You*** is recommended. For developing the skills necessary to lead in organizations, we are going to deliver content from ***The Leadership Challenge***, by Kouzes and Posner. Both of these are widely used in national and international medical leadership development programs. This will allow you to think in leadership terms that are familiar to the faculty and to other health care leaders throughout the world with whom you may engage.

For integrating the skills necessary to change the existing regional or global palliative care environment, we will be building upon and weaving the strategy defined in the ***Public Health Strategy for Palliative Care***. Our faculty will address key components including establishing appropriate policies, addressing drug availability and use, education and advocacy skills, and the important aspects of implementing change for a successful outcome. Your leadership skills and influence will be a cornerstone upon which there really can be an "advance of palliative care" globally.

### **The Myers-Briggs Type Indicator (MBTI)**

The Myers-Briggs Type Indicator (MBTI) will be sent to you electronically. This instrument is a well-validated tool that helps to understand seemingly random variations in your own behavior and others. It is part of the 'interior' work you will be asked to do. Understanding the implications has been shown to be very powerful and lots of fun as well. Helen McNeal, (LDI faculty) is a credentialed MBTI facilitator, and will be working with you to gain insights from your personal results.

### **The Leadership Practices Inventory (LPI)**

The Leadership Practices Inventory (LPI) will also be sent to you electronically. This tool, developed by Kouzes and Posner, will help you identify your own leadership strengths and opportunities for improvement as a pre-Initiative baseline. It may be true that you have been leading others for years, but we believe that you will gain valuable insights about yourself, and gain practical and useful information to build into your IDP that will enable you to realize your full leadership potential.

## Individual Development Plan

One of the most powerful tools for personal professional development is the *Individual Development Plan* (IDP). It is essentially a 'roadmap' of your own goals and planned activities to achieve them. The purpose of the IDP is to encourage and promote the highest level of performance you can imagine. Designing, reviewing and refining the document over the time of the LDI will result in your own professional leadership growth and development, and help ensure that the plan you design for yourself and your region will become a reality. To facilitate the development of your IDP, an initial template will be given to you. Your regional mentor will be your IDP 'consultant', serving as a specialist and a support to help you outline the goals and methods to accomplish them.

In your IDP, will delineate the skills and actions you require to bring about the strategy of successfully advancing palliative care in your setting. The contents of the IDP will be unique to you, but the framework will be the same for everyone. You will delineate focused goals, a timeline for accomplishing the goals, the skills needed to achieve the goals, and the action steps or activities you are planning. Activities may include developmental projects in areas such as policy development, drug accessibility, and education or program implementation. You will include educational opportunities you plan to take on such as attending leadership skill-building courses or conferences, visiting your mentor or other consultants who may offer expertise and modeling, or you may invite them to visit you. How you design your IDP is as open as your imagination and far-reaching goals, so think boldly!

The IDP will also include a proposed budget for the activities in each 6 months, and will be the basis upon which approval will be given for your stipend for that same period. At each 3-month interval, you will engage with your mentor and a member of the LDI team by phone (likely SKYPE) to review your IDP to keep you 'on-track', look back at the activities in the preceding 3 months, and look ahead at the 3 months to come.

Starting on Day One of the first residential conference in January, there will be several hours for you to work on your IDP, and every day, there is more time to build-in additional complexity and completeness. As well as identifying your own personal 'action plan', you will have an opportunity to work with the other participants in your region to collaborate and define potential areas of practical intersection, sharing ideas and suggestions for similar programming. During the last day of the residential course, you will have an opportunity to present your IDP to the entire group for their suggestions, reflections, and feedback.

Your IDP will be a 'live' document. It will be most powerful when there is on-going thoughtful engagement and revision of the action plans that come from it. After your IDP has been reviewed and agreed to by the Administration responsible for your work at your home institution, **your "formal" IDP and the first budget must be submitted to your regional mentor and the LDI team by February 17<sup>th</sup>, 2010.** Approval and feedback will follow.

## **Mentorship**

Perhaps the single most important strength of the LDI is the opportunity to work with your regional mentor, as well as the LDI faculty who will be in the background to support the primary mentor-mentee relationship. Successful mentoring is a dynamic process that evolves as you get to know each other. The mentor may act as advocate, advisor, role model, guide, coach or sounding board. No matter what aspect plays out, structured time and plenty of communication with your mentor will facilitate your goals and aspirations in the LDI. The mentorship assignments were designed to take advantage of relationships, colleagues and realities in a particular region. You will be spending time with your mentor every day during the residential courses. Between residential courses, at a minimum each quarter, you will be responsible to speak with the regional mentor to review your IDP and budget, via SKYPE and video, if possible.

In addition to your regional mentor, you may know other people who offer expertise in different developmental areas, in-country or out. It is anticipated that you will receive mentoring from several additional "local mentors" in your own country or region as well. We encourage you to identify other experts who may be able to help you 'on-the-ground', and who can be added to a growing list of mentorship resources. Unfortunately, these local mentors will not receive funding from the LDI, nor will they be responsible to IPM, but you may offer them with an honorarium from your own stipend if you find they contribute substantially to your educational endeavors.

Your regional mentor will have a copy of your CV and a copy of your completed situation analysis, so that at your first meeting, some preliminary information will already be known to them, and you can begin to outline the details of the IDP effectively.

## **Participation in the LDI "*Community*"**

Our hope is that you will enter into this Initiative with a sense of *community*. Peer-to-peer networking is a resource to be embraced; each of you offers skills and experience that may be foundational to others in the cohort. Communication with colleagues, mentors, and LDI team via email, Skype, and the LDI moderated listserv will allow free exchange of ideas, discussions and questions. It is for this reason that we are placing emphasis on having the Internet technology that will make this interchange easy, fruitful and fun.

### **Enhancing your Technology:**

In the months preceding the first residential course, LDI Technology Consultants will contact you to help to ensure that your IT capacity is optimized. We are sending the first part of your stipend to you in December so that if improving your access or technical capacity is possible, you will have the funds to do so. They will be asking about your SKYPE and video capacity, as well as computer access realities. It would be very helpful if you could do some preliminary investigations in advance of their contact to see what is available in your region.

We imagine that the relationships built in this LDI will last far beyond the two years, enriching each and every one of us and building community world-wide in a way that has not been possible before.

## **Participation in the Evaluation Process**

There will be frequent opportunities to provide feedback and evaluation. Besides the evaluations during the 5-day Residential Courses, you will be asked to complete Quarterly Reports, Annual Reports, and a 'Final Project'.

### **Quarterly Reports:**

The quarterly reports will be provided to you as on-line templates. It is anticipated that these will be filled out and submitted before your scheduled SKYPE (or phone) calls with your mentor. You will be asked to document and describe your skill-building and leadership activities, including presentations, publications, meetings, etc., in the preceding quarter. You may also be asked to provide reflection about your own growth and development, your insights and new understandings. This is an opportunity to propose the activities and events for the up-coming quarter, as well as discuss the budget implications. You will be invited to evaluate your experience with your regional or local mentors, webinars, resources or educational content sent to you by the LDI team and/or your experience with the LDI Team, if any.

The LDI Team will also be 'with you' on the calls with your mentor, and the conversations and points of discussion will be taped and transcribed by the LDI Team to be entered into your personal 'journal center'. These reports will be used to recall, prepare, and eventually to write your leadership 'story'. We expect the Quarterly Reports to be a fairly easy process, with the template and guided discussion items. Satisfactory progress toward completion of your IDP and continued quarterly contact with your mentor with required budgeted reporting will ensure that your semi-annual stipend will be sent to you without delay.

## LDI Activities Timelines

DATE	JAN 2010			APR 2010			JUL 2010			OCT 2010	NOV 2010	DEC 2010	JAN 2011			APR 2011			JUL 2011			OCT 2011	NOV 2011	DEC 2011
Residential Courses																								
Quarterly Reports																								
Annual Reports																								
Final Project																								

### Year-End Reports:

The year-end reports may require a bit more personal writing. A template will be provided to you. A written summary of your activities over the preceding year, and a description of how your stipend has been used toward meeting your educational goals in the IDP will be submitted. These reports will be due in December 2010 and 2011. Each will be reviewed and must be “signed off” as satisfactory by the LDI team and IPCI leadership at the Open Society Institute. A copy of your report will be forwarded to The Diana, Princess of Wales Memorial Fund.

### Final Project:

You will complete a “final project”, due in December 2011. To document the ‘story’ of your leadership development journey, and help you capture and create this project, you will use your on-line journal entries, the transcriptions of all the quarterly calls with your mentor, and all on-line reports. Your mentor will help you with this final project. These leadership development stories will be gathered together and prepared for publication. We hope to inspire and enlighten others who may be having leadership challenges in their own setting. Your story will provide qualitative data for evaluating the Initiative’s impact, in addition to other quantitative and qualitative information such as pre- and post-initiative self-assessments, assessments by your mentor, and senior leadership at your institution.



Quantitative evaluation will be collected from you about all aspects of the experience, the overall course content, about the experience with your mentor(s), the faculty, and the Initiative Leadership Team. With your input as described, the overall experience of the Initiative by the LDI Team will be gathered, evaluated carefully, and published.

### **Institutional Review Board and Consent**

The Institutional Review Boards in the United States are formally designated to approve, monitor and review any research involving humans in order to protect them. As this Initiative is a pilot project, and designed to gather data for research and development, we will complete our standard IPM IRB review and approval process. Once approved, we will ask you to sign a consent form that will grant us permission to use your evaluation, feedback and all qualitative and quantitative data. Using the full array of data will facilitate on-going improvement of the LDI for all participants, mentors and faculty.

### **Financial Support**

#### **Stipend**

The Memorandum of Agreement (attached) explains the stipend and the dates the money will be wired to your bank account. We will send you a form to collect the necessary information so that wiring money to you is safe and efficient. Please remember to sign and keep a copy of the Memorandum of Agreement for your records. The stipend (minus bank transaction fees) will be paid contingent upon full participation in the weeklong residential courses, satisfactory completion of your quarterly reports, engagement with your mentor, review and update of your IDP and budgetary requirements as well as completion of each annual report and the final project.

#### **Residential Courses**

**Travel:** The LDI will pay for your airfare and ground transportation expenses to each course location. For each course, you should plan on staying a minimum of 7 days. Because of the time needed for adjustment to time zone changes, we are encouraging you to consider coming in advance of the course. Once we get a signed Memorandum of Agreement from you, we will be able to begin to make travel arrangements for you. DO NOT purchase any tickets yourself without written permission from the LDI Team. Unfortunately, we cannot provide financial support for required visas, incidental travel expenses, or additional days you may wish to stay in advance of, or after, the days of the course. You may pay for visa expenses from your stipend, but not for additional days you stay before or after the course, unless directly related to the educational goals in your IDP.

**Accommodation and meals:** Your accommodation and meals during the 7-day course will be covered. Most of the meals will be provided from the award-winning hotel services, with the company of other LDI participants. The address of the hotel and contact numbers for the January 2010 course are:

## **Courtyard Marriott San Diego Mission Valley/Hotel Circle**

595 Hotel Circle South  
San Diego, California 92108 USA  
Phone: +1.619.291.5720  
Fax: +1.619.297.7362  
[www.courtyardsd.com](http://www.courtyardsd.com)

Should any family member travel with you, you will be responsible for their expenses. They may share your room, but payment for any meals or additional room charges that accrue because they are present will be your responsibility.

### **Travel/Health Insurance**

As healthcare is very expensive in the United States and many other countries, you will be expected to provide evidence of adequate health insurance coverage for your time in the United States. We also advise that you ensure you have adequate coverage for any other travel you plan to do as part of the LDI. While you can pay for Health/Travel insurance from your stipend, you cannot use your stipend to pay for any health expenses you may incur should you have a medical emergency. We recommend that you investigate and purchase a policy from one of the many insurance companies in the US or Europe that have policies for visitors. One policy we have found that offers very good coverage is TFG Global Insurance Solutions Ltd. The corporate website is [www.tfgglobal.com](http://www.tfgglobal.com). Email contact is [info@tfgglobal.com](mailto:info@tfgglobal.com). This policy provides health insurance for travel outside your country of residence for a year, no matter how many trips are taken. Be sure to consider insurance options for health, dental, emergencies, evacuations, and repatriation of your remains should you die.

Travel insurance offers coverage for such things as trip cancellation or delay due to unforeseen events, for stolen or lost baggage and response to a medical emergency. These days, travel can get complicated and somewhat unpredictable. Please consider getting travel insurance to protect yourself as you travel. There are many plans available on line to choose from.

### **Overview of The Institute for Palliative Medicine**

The LDI builds on the foundational work that the International Palliative Care Initiative at the Open Society Institute (IPCI) has done around the world to increase the capacity of palliative care. With a grant from OSI, and additional support from the Office of International Affairs, National Cancer Institute (OIA, NCI) and from The Diana, Princess of Wales Memorial Fund (DPWMF), The Institute for Palliative Medicine in San Diego has undertaken to lead the Leadership Development Initiative in partnership with OSI, OIA, NCI and DPWMF. (Please refer to the attached Overview of The Institute for Palliative Medicine that describes our vision, mission and programs).

As a participant in the LDI, you become part of the growing IPM 'family' of trainees and alumni when you graduate. As you advance in the LDI, you will have the opportunity to use the IPM name and logo, as well as the LDI logo. It is our expectation that you will cite or credit the LDI in any related work, using a citation statement like the one below:

“An Initiative of the Institute for Palliative Medicine at San Diego Hospice  
Funded by a Grant from the International Palliative Care Initiative, Open Society  
Institute, New York, with Additional Support Provided by the National Cancer  
Institute, Bethesda, Maryland and Diana, Princess of Wales Memorial Fund, London,  
UK”

## Confidentiality and Privacy Concerns

We will be very respectful of your confidentiality and privacy concerns, and know you will honor the same for your colleagues who are participating in the LDI. We have a private website for LDI participants, mentors and the team, ([LearnCenter.com](http://LearnCenter.com)) and content here must not be shared with others. The moderated listserv also will be a place for confidential discussions, not to be shared with others unless the person involved has been granted express permission. You will have a private password-protected file to archive your journaling, reflections and insights as you travel the Leadership pathway. The transcribed quarterly phone calls will be kept here also, so the material to help you write your final project is readily accessible. Your mentor and the LDI team may review and add to the material inside, but this file will be kept private from all others. A Users Guide for the [LearnCenter.com](http://LearnCenter.com) will be provided to you and will delineate important features and access.

The **International Palliative Care Resource Center** web-portal ([IPCRC.net](http://IPCRC.net)) is a new innovation of the IPM. It serves as a ‘one-stop’ resource center for international palliative care providers, with the hope that the links and information shared will build palliative care capacity worldwide, and provide a dynamic and constantly expanding website. It is a public website, and is open to everyone. Here you will find access to an extensive array of palliative care resources including comfort, supportive, hospice, end-of-life, terminal and bereavement care, with a layout based on the **Square of Care** from the Canadian *Model to Guide Hospice Palliative Care*, and the World Health Organization (WHO) Public Health Strategy for developing palliative care capacity. Please send in any links for regional or national resource information that you know about, (events, meetings, organizations, etc) as well as foundational content to widen the value of this web-portal. Send your suggestions to [newresources@IPCRC.net](mailto:newresources@IPCRC.net). Eventually, as the LDI curricular materials are ready for public access, they will be placed here.

## Copyright/Attribution

As you can see, we are expecting a rich interchange of experience, education, and contribution to the LDI community and in the material of the course itself. As a formal participant in the LDI, and particularly while the pilot project is in development, any contribution you make will be fully acknowledged with appreciation. IPM will own the copyright for all the materials produced through this Initiative, though once ready for public consumption, open access will be provided through [IPCRC.net](http://IPCRC.net).

## **What Happens if I Can't Complete the Initiative Requirements?**

We are aware that life circumstances may change, and not being able to complete the Initiative in full, or inability to complete parts of the Initiative may become an issue. If you become aware that you are unable to attend or fully participate in the Initiative, or are unable to complete the required evaluations, reports, or your Final Project, we ask that you discuss this with your mentor and the LDI team. There is an agreement with our funders that any pending stipend may be delayed until each sequential requirement is completed. These kinds of decisions will be taken only after careful discussion between you, your mentor, and the LDI team. The ultimate decision of the LDI team in collaboration with our funders will be final and binding.

Because of your personal professional ethic and your understanding that *without cause* 'incompletes' will affect your future in global palliative care leadership, we do not anticipate any untoward situations, but are obligated to include such language in this Guideline, and in your Memorandum of Agreement, and seek your signature to acknowledge your understanding.