

LDP

MODULAR LEADERSHIP DEVELOPMENT PROGRAM
FOR PHYSICAL REHABILITATION CENTERS

Board Alignment Meeting **BAM**

Leading, Managing, & Governing **1**

Mission, Vision, & Scanning

2



Team Challenge & Measurable Result **3**

Focusing & Root Cause Analysis **4**

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Board Results Presentation Meeting **BRP**



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**LEADERSHIP, MANAGEMENT
& GOVERNANCE PROJECT**



Inspired Leadership. Sound Management. Transparent Governance.

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ICRC-LDP MODULE 2

Mission, Vision, and Scanning the Current Situation

PURPOSE

Introduce participants to the concepts of mission and vision and use their current situation as preparation for using the Challenge Model

MODULE OBJECTIVE

- To become familiar with the Challenge Model
- To clarify the organization's mission and strategic priorities
- To create a shared vision as a rehabilitation center
- To define scanning
- To identify methods of scanning

LEARNING OBJECTIVES

- At the end of the Module, participants will be able to:
- Explain the difference between challenges and problems
 - Describe the eight steps to complete the Challenge Model
 - Identify their rehabilitation center's strategic priorities
 - Enumerate the main elements of the rehabilitation center's shared vision
 - Apply one scanning method to collect accurate information about their rehabilitation center's current situation

MODULE CONTENT AND SCHEDULE

Full module duration: 4 hours

ACTIVITY	TIME
A. Welcome, homework review, and module overview	30 minutes
B. Introducing the Challenge Model	45 minutes
Break	15 minutes
C. Mission versus Vision	30 minutes
D. Creating a Shared Vision	60 minutes
E. Scanning the Current Situation	45 minutes
F. Homework and closing	15 minutes

PREPARATIONS

- Read the *Manager's Guide* notes for this session.
- Prepare the required flipcharts and make copies of all handouts, including accessible format copies for participants with disabilities (e.g. large print, Braille, or providing all handouts on a USB for participants to access on computers during the session).
- Review the organization's strategic plan or other appropriate documents to understand the organization's mission and strategic priorities.

MATERIALS

- Flipcharts—easel and paper
- Tape
- Colored markers
- Crayons, brightly colored pencils, or felt pens

PREPARED FLIPCHARTS

- Module 2 objectives and schedule
- Assignments for Module 1
- Drawing of the Challenge Model
- Example of a vision and of a mission
- Rehabilitation center's mission and strategic priorities
- Prepared flipchart with the definition of the vision and a mission (see Activity C, Step 2)

HANDOUTS

- *Using the Challenge Model* (p. 2-16)
- *Client Exit Interview* (p. 2-17)
- *Focus Group Guiding Questions* (p. 2-18)
- *Common Data Sources* (p. 2-19)

HOMEWORK


Scan the current situation



Activity A.

Review the Learning and Homework from Module 1 and the Objectives for Module 2

This exercise reviews what participants learned during the last module and explains the objectives of the present module.

 **Duration** 30 minutes

 **Materials**

-  Prepared flipchart: Module 2 objectives and schedule
-  Flipchart: Assignment for Module 1


 **Process**

STEP 1. Review of Module 1 content (10 minutes)

In the large group:

SAY: *We are about to start ICRC-LDP Module 2. Before starting, let's review Module 1.*

ASK: *What did we learn in Module 1?*

 **Take notes** on the flipchart and make a summary about the main learning in Module 1.

 **Read aloud** what you write as you write it.

ASK: *Does anyone have any questions at this point in the process?*

STEP 2. Overview and agenda for Module 2 (5 minutes)

 **Show the flipchart** with Module 2 objectives and schedule.

Review the workshop's objectives and schedule.

STEP 3. Report back on assignments (15 minutes)

 **Show the flipchart** with assignments for Module 1. Read it aloud.

In plenary, ask each team to briefly state their assigned governing practice and describe their ideas for ways in which they can apply that practice to support ICRC-LDP.

Activity B. Introducing the Challenge Model

This exercise presents participants with a brief overview of the Challenge Model.

Duration

45 minutes

Materials

- ▣ Prepared flipchart with the Challenge Model drawn on it
- ▣ Handout: *Using the Challenge Model* (p. 2-16)

Process

STEP 1. Introduce the Challenge Model and explain the difference between challenges and problems (15 minutes)

SAY: *Remember that in the last module we said the ICRC-LDP uses the natural process of leadership development, which involves facing challenges while receiving feedback and support. Do you remember the triangle?*

SAY: *Throughout the program, we will use a tool called the Challenge Model to help us choose a challenge and develop a path that leads to measurable results.*

ASK: *But to start, let's first discuss:*

What is the difference between a challenge and a problem?

Make a summary of the group's answers to your question and complement it with your own definitions:

SAY: *A problem is "out there" and often blamed on external forces.*

A challenge is something you own and take on. It involves a result that you are committed to achieving.

You can state a challenge as a question: "How can we achieve the result we want to achieve in the face of obstacles we have to overcome?"

Check for understanding by asking if the difference is clear.

Encourage participants to think about whether problems they identify can be seen as challenges that they are willing to own and that they can use their leadership skills to address.

STEP 2. Introduce the steps of the Challenge Model (30 minutes)

☞ **Show the flipchart** with the Challenge Model.

☞ **Read** aloud the information on the flipchart

SAY: *The Challenge Model will help our team to meet a challenge by moving from vision to action. It will enable us to know where we currently are and to determine where we want to go before deciding on a plan of action.*

☞ **Distribute** copies of the handout *Using the Challenge Model*. Ensure that participants with disabilities have a copy that is accessible to them.

SAY: *This handout explains the steps of the Challenge Model to use to go from vision to action.*

We will fill out the Challenge Model during our ICRC-LDP meetings.

To guide the participants through the steps of using the Challenge Model, point out its parts, one by one, on the flipchart. Make sure to read aloud as you point at each part.

☞ **Point to the mission** at the top of the Challenge Model.

SAY: *In Step 1, we will work to review our organization's mission and strategic priorities.*

Knowing the rehabilitation center's mission will help us shape a shared vision and will ensure that the shared vision contributes to organizational priorities.

☞ **Point to the vision "cloud."**

SAY: *In Step 2, we will create a shared vision in an exercise to visualize where we want to go to help the rehabilitation center achieve its mission.*

This vision will inspire us to face each new challenge.

☞ **Point to the current situation.**

SAY: *In Step 3, we will assess our current situation in relation to our vision and the center's organizational priorities by scanning internal and external environments.*

We will consider positive and negative factors in the environment that can affect our ability to move toward our vision and to contribute to the organization's priorities.

Point to the measurable result.

SAY: *In Step 4, we will use our understanding of the current situation to agree on one measurable result that will move us closer to the vision.*

We will be committed to achieving our measurable result in the next 6 months (define the date according to the length of the ICRC-LDP). The result should be a “stretch” for the team.

We will choose one or more key indicators of success and track those indicators. This is how we will monitor progress toward our measurable result and evaluate our achievements at the end of the ICRC-LDP experience.

Point to the obstacles and root causes.

SAY: *In Step 5, we will identify the obstacles that we have to overcome to reach the result.*

We will use a tool to analyze the root, or underlying, causes of these obstacles so that we can address these causes in our Action Plan.

Point to the challenge and priority actions.

SAY: *In Step 6, we will produce a written statement of our challenge, stating the result we plan to achieve in light of the obstacles we will face.*

Point to the Action Plan.

SAY: *In Step 7, we will develop an Action Plan. We will select priority actions or interventions to address the root causes.*

This plan will include the human, material, and financial resources needed and time lines for implementing our priority actions.

The plan will include activities to monitor progress toward our results.

SAY: *In Step 8, we will implement our Action Plan. We will monitor our progress and evaluate our results according to indicators that we have identified.*

Monitoring our progress will help us adjust our plan as needed to keep moving toward our intended results.

Evaluating our results will help us look back at positive and negative factors in meeting our challenge. And it will help us use our learning to meet future challenges in this and other rehabilitation center priorities.

SAY: *Today we will start filling out the Challenge Model with our mission, vision, and organizational priorities. Between Modules 2 and 3 we will scan to identify our current situation.*

Activity C. Vision vs. Mission

Participants learn to understand the distinction between a mission and a vision.

Duration 30 minutes

Materials

- ❑ Prepared flipchart with the rehabilitation center's mission statement written on it
- ❑ Prepared flipchart with an example of a vision statement and a mission (see Step 3)
- ❑ Prepared flipchart with an definition of a vision (see Step 3)

Process

STEP 1. Organizational mission (10 minutes)

SAY: *Each organization brings a contribution.*

We know that they have a mandate, something that is their purpose, and something unique that they bring to society.

For example, some organizations take care of people's health, others educate children, etc.

ASK: *What is the purpose or mission of our organization—why does it exist?*

Discuss in pairs and then take responses in the large group.


ASK: *Why is it important to have a mission?*

Does it give you clarity about what to do and where to spend your energy?

SAY: *Being clear about your purpose helps you to focus.*

ASK: *What are your organization's strategic priorities, and which are the three most important ones?*

Again, let people discuss this in pairs.

 **Write** answers on a flipchart. After they have responded, show the flipchart with the organization's mission statement and strategic priorities.

 **Read** it aloud.

STEP 2. Compare a vision and a mission (10 minutes)

With the whole group:

SAY: *A mission states why something exists.*

A vision is a picture of a desired future. It describes where the group or the organization wants to be in the future. It includes an image that you can see in your mind.

 **Show and read aloud** the following examples of a vision and of a mission (written on flipchart).

Mission: *The ministry of health has as its purpose to serve the health needs of the entire population, especially those most in need.*

Vision: *We see healthy children walking to school on safe roads.*

SAY: *This is a vision created by a team from a rural health unit in Afghanistan.*

STEP 3. Introduction to a vision (10 minutes)

SAY: *Humans have a wonderful ability to create things in our minds, to dream, and to imagine the future.*

Trees and dogs can't do this.

Unfortunately, people can misuse this capacity by imagining the worst possible outcomes.

Let us instead use our minds to imagine a better, more pleasing future.

Most good outcomes in the world were first imagined by someone.

In order to play a role in creating the future, you must first imagine what you want to happen.

Reading from a flipchart:

SAY: *A vision is a picture we create in our minds of a desirable future toward which we can begin to act.*

Visioning enables us to play an active role in creating the future.

Activity D. Create a Shared Vision

This exercise guides participants through the process of creating a shared vision using images and pictures rather than words. Drawing helps people connect with what is personally meaningful to them.

Duration 60 minutes

Materials

- ▣ Assortment of colored markers or crayons
- ▣ Flipcharts

Process

STEP 1. Create a picture of a desired future state (5 minutes)

SAY: *Now you are going to dream about the future of your rehabilitation center. Think about your rehabilitation center two years from now. Imagine that you have overcome all problems and reached all your goals.*

Make a quick sketch of the image that comes to mind and represents these achievements.

Assure people that this is not a drawing contest, and stick figures are fine. Explain that the reason you ask them to draw a picture, rather than use words, is to make sure the vision starts as something they can see.

If your group is larger than eight people, divide participants into groups of from four to six people.

STEP 2. Share drawings with other group members (5 minutes)

Ask participants to share their sketches with their team members.

STEP 3. Prepare one drawing per group (20 minutes)

Ask each group to prepare one large drawing (flipchart size) that captures the collective dream of the members in their group.

—This process encourages participants to contribute elements that are important to them and leave out elements they do not consider as important.

STEP 4. Show small-group drawings (10 minutes)

Ask each group to present its large drawing to the whole group.

If necessary, have the group clarify parts of the drawing that are not clear.

While the small groups show their drawings:

👉 **Take notes** on the flipchart about the elements and concepts shown in the drawings.

👉 **Read** aloud what you write.

STEP 5. Review the common elements and concepts represented in the drawings. (20 minutes)

In the large group, review the common elements and concepts that you recorded.

ASK: *Is this what we most hope to accomplish through our leadership?*

After discussion, facilitate writing an inspiring vision statement based on the common elements of the drawings.

Activity E. Scanning the Current Situation

This exercise introduces participants to the concept of scanning and scanning methods. This will help them to describe the current situation and in the following module choose the right measurable result.

Duration 45 minutes

- Materials**
- ❑ Prepared flipchart with the Challenge Model drawn on it
 - ❑ Flipchart with the center's mission and priorities
 - ❑ Flipchart created in the previous session with the vision statement
 - ❑ Flipchart paper
 - ❑ Handouts: *Client Exit Interview* (p. 2-16), *Focus Group Guiding Questions* (p. 2-17), *Common Data Sources* (p. 2-18)

Process

STEP 1. Describe the current situation (15 minutes)

 **Point out “Current Situation”** on the Challenge Model flipchart. Describe it aloud.

SAY: *We are going to start filling out the Challenge Model. We already have our mission and strategic priorities at the top. We have developed our vision statement. Now we should analyze where we are.*

Have participants look at the flipchart with the rehabilitation center's mission and strategic priorities, and the flipchart with the vision statement they just created.

ASK: *What is the current situation of our rehabilitation center related to our three main strategic priorities?*

SAY: *Consider the positive and negative factors that could make it easier or harder for us to contribute to our strategic priorities.*

Listen to participants' suggestions.

 **Take notes** of their ideas on the flipchart, separating them into positive and negative factors. Describe what you write aloud as you write.

Suggest that participants look at such factors as organizational and personal needs, concerns, time available, and strengths and weaknesses of the team. They might also look at external factors such as community priorities, human and financial resources, government policies, and laws.

SAY: *You may not know all the details without doing more scanning to collect missing data or check the truth of your assumptions. This will be your assignment between this module and the next one. But now, let's reflect more about what scanning means.*

STEP 2. Introduce the concept of scanning (10 minutes)

ASK: *What do you have to learn in order to better understand the current situation as it relates to the rehabilitation center's priorities?*

 **Write** people's responses on a flipchart.

 **Read** aloud what you write as you write it. Add any of the following if they were not mentioned:

- People's rehabilitation and service needs
- Service statistics
- Resource usage and needs
- Your team members' strengths, needs, and concerns

STEP 3. Identify scanning methods (20 minutes)

ASK: What scanning methods are available to you?

Go around the room and write responses on a flipchart. Read aloud as you write.

 **Distribute and review** the *Client Exit Interview*, *Focus Group Guiding Questions*, and *Common Data Sources*. Make sure participants with disabilities have copies that are accessible to them.

SAY: *A client exit interview helps us to understand our clients' needs and hear directly from them. That way we don't have to rely on only our own perceptions or opinions.*

Focus group guiding questions help us to identify the needs of a particular segment of the population.

Existing management information systems provide routine data on clients' use of services and the financial picture.

ASK: *How can we use these methods to scan in order to better understand the current situation and be able to pick our measurable result?*

Discuss and choose some scanning methods to use.

F. Homework

Scan the Current Situation

SAY: *In order to scan our environment and have more accurate data about the current situation, we will divide the assignments to be prepared for our next module.*

Divide the group in subgroups and assign to each subgroup one method of scanning that you have selected.

SAY: *You already have handouts with samples of client exit interviews, focus groups, and data sources.*

As a team, you need to organize yourselves to collect the data assigned to you and bring it to the next module so we can complete our understanding of the current situation.

Handouts—Module 2

Mission, Vision, and Scanning the Current Situation

- 1. Using the Challenge Model (p. 2-16)**
- 2. Client Exit Interview (p. 2-17),**
- 3. Focus Group Guiding Questions (p. 2-18),**
- 4. Common Data Sources (p. 2-19)**

USING THE CHALLENGE MODEL

STEP 1

Review your organizational mission and strategic priorities

With your team, agree on a common understanding of your organization's mission and strategic priorities. This understanding will help shape your vision within the context of your organization's priorities.

STEP 2

Create a shared vision of the future

With your team, imagine what you and others envision when your team has made its contribution to improvements in your organization's strategic priorities. This shared vision will inspire the team to face each new challenge.

STEP 3

Assess the current situation

With your team, scan your internal and external environments within the context of your organization's priorities. Consider such factors as the prevalence of the health problem, government policies, and current interventions. This will help you form an accurate picture of the conditions that can affect your team's progress toward your shared vision.

STEP 4

Agree on one measurable result

Based on your organization's priorities and your current situation, define a measurable result that can be achieved within the time frame of this ICRC-LDP. This desired measurable result is what will drive your work together and allow you to monitor and evaluate your progress toward achieving it.

Your team will most likely need to adjust the result as you gain more information about the current situation and the obstacles you need to overcome.

STEP 5

Identify the obstacles and their root causes

Make a list of obstacles that you and your team will have to overcome to reach your stated result. Consider gender equity issues, access issues for persons with disabilities, and the four broad categories into which most obstacles fall: policies and procedures; providers; equipment, infrastructure, and supplies; clients and communities. Use a root cause analysis tool to make sure you are addressing the causes and not just the symptoms.

STEP 6

Define your key challenge

State what your team plans to achieve (your measurable result) in light of the root causes of the obstacles you have identified. (It helps to begin your challenge statement with: "How will we...?")

STEP 7

Develop an Action Plan

Develop an Action Plan that lists the priority actions needed to meet your challenge. Include estimates of the human, material, and financial resources needed and the time line for implementing your actions.

STEP 8

Implement your plan, monitor progress, and evaluate results

Work together as a team to implement the plan. Regularly monitor your progress toward your measurable result and, at the end, evaluate your result.

CLIENT EXIT INTERVIEW

Introduction to Clients:

We want to learn how to make this health facility serve its clients in the best way it can. Can you please answer a few questions so that we can learn from your experience about what is needed at this facility?

Questions:

1. How did you learn about this center?

2. To your knowledge, how accessible is information about this center to persons with different types of disabilities in the community?

3. How often do you come here?

4. Why do you choose to come to this facility as opposed to another facility?

5. What do you like/dislike about the services at this facility?

6. What is the most important reason you use this facility? Why is that important for you?

7. What are the next most important reasons you would use, or not use, this facility?

8. How do you feel when you visit this center?

9. What would you recommend to improve the physical accessibility of this center? What would you recommend to improve communication and information accessibility for persons with disabilities at this center?

10. What do you think a rehabilitation provider should do for his/her clients?

FOCUS GROUP GUIDING QUESTIONS

Group:

Composed of 5–10 participants from the community who use center's rehabilitation services. The process can take from half an hour to one hour. Have someone in the room with you who can take notes as participants respond to the questions.

Begin: Introduce yourself and say:

- I am here to learn about the rehabilitation needs in your community and your expectations of your rehabilitation service facility.
- I am going to ask several questions.
- We want to hear both what is working well and what needs to be improved, so please speak freely.

Questions:

1. What are the most important rehabilitation needs in this community? How are those needs being met?

2. What are your reasons for coming to the rehabilitation center?

3. How did you learn about this rehabilitation center?

4. How accessible is information in your community to persons with different types of disabilities?

5. What is your experience when you are at the facility?

- What is good?
- What needs improvement?

6. If you were to give advice to the care providers, what would you tell them?

7. Do you have recommendations to improve the physical accessibility of this rehabilitation center?

- Do you have recommendations to improve the communication and information accessibility for persons with disabilities at this center?

8. What do you tell others about the rehabilitation center?

- Do you recommend that they use the facility?
- Why do you recommend it? OR Why do you not recommend it?

9. What other services would you like to see here that you have seen or hear about somewhere else?

- Why would you like that? What else?

10. If you were to describe the best rehabilitation facility, what would it be like?

11. What have you seen yourself, or heard about, that happened in the rehabilitation facility that you would NOT like to see happen to you or to anybody else?

12. What would you describe as the worst thing in the rehabilitation center? Why?

13. If you have the chance to change something in the rehabilitation center, what would you like to change or see done differently?

- What would be the first thing to change? Why?
- What would come after that? Why?
- What else? Why?

COMMON DATA SOURCES

1	POLICY OR GOVERNMENTAL PROGRAM LEVEL	<ul style="list-style-type: none"> ■ Official documents and records (legislative and administrative documents) ■ National budgets or other accounts ■ Policy inquiries ■ Websites
2	SERVICES LEVEL	<ul style="list-style-type: none"> ■ Facility records (service statistics, HMIS data, financial data) ■ Inventories or facility assessment surveys ■ Provider performance or competency assessments, training records, quality-of-care data ■ Client visit registers
3	POPULATION LEVEL	<ul style="list-style-type: none"> ■ Government census ■ Vital registration systems (birth and death certificates) ■ Sentinel surveillance systems ■ Household or individual surveys
4	INDIVIDUAL LEVEL	<ul style="list-style-type: none"> ■ Case surveillance for specific diseases ■ Medical records ■ Interview data (e.g., client exit interviews) ■ Observation of provider-client interactions



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