Leadership Rotation/Longitudinal Experience
For
Students, Interns, Residents, and Pharmacists

Sample Leadership Syllabus

> *In recognition of the need to develop future leaders,* **the ASHP Section of Clinical Specialists and Scientists – Section Advisory Group in Clinical Leadership, the ASHP Section of Pharmacy Practice Managers – Section Advisory Group on Leadership Development, the ASHP Section of Inpatient Care Practitioners – Section Advisory Group on Pharmacy Practice Experience and the New Practitioners Forum** *have compiled a summary of suggested activities, experiences and reading lists in order to help impart leadership training.*

Rotation Description:

The Leadership rotation/longitudinal experience will help students/interns, residents, clinical staff pharmacists and clinical specialists become familiar with the key principles utilized in hospitals and health systems for leadership. The syllabus is designed to expose the learner to leadership nomenclature, key principles, tools and available resources. The learner will participate in several activities designed to improve their working knowledge and experience with leadership concepts. The rotation/longitudinal experience will enable the learner to apply knowledge in any pharmacy practice setting to improve leadership skills.

Goals and Objectives:

The preceptor and learner should agree on which goals and objectives are appropriate for the rotation/longitudinal experience based on practice site, rotation objectives delineated by pharmacy school or residency program, rotation length and interests. The following are a list of potential goals and objectives related to topics of leading individuals (e.g. yourself or others) and leading an organization.

Leading Yourself/Leading Others:

1) Understand and develop key concepts associated with pharmacy leadership.
2) Explain why it is important to have a clear direction, starting with the mission and vision statements and a strategic plan.
3) Describe the methods for communicating effectively your message as a leader.

4) Describe how to create a network and why it is important to your success as a leader.
5) Understand the importance of a mentor, and how to cultivate and maintain a relationship with your mentor.
6) Apply social and emotional intelligence techniques to conversations with your preceptor and other pharmacy staff.
7) Understand why it is important to evaluate an organization's culture and how to modify the culture to drive performance.
8) Describe clinical leadership and your role with it as a student/intern/resident/pharmacist.
9) Apply mentoring and critical conversation techniques to case scenarios to ensure the best outcomes from the encounters.
10) Describe methods to identify organizational medication safety risk as a leader (e.g., self-assessments, error reports, trigger methodology, integration of technology and clinical decision support tools). Identify risk reduction strategies and delineate effectiveness of various strategies.
11) Become familiar with leadership resources and opportunities, such as: the ASHP Center for Health-System Pharmacy Leadership, ASHP Foundation Leadership Resource Center, ASHP Practice Managers, the Pharmacy Leadership Academy (PLA), the Pharmacy Leadership Institute, the Pocket MBA for Pharmacists, and Harvard Business Review.
12) Understand the concept of self-reflection and its relationship to the development of personal leadership values.

Leading an Organization (e.g. Department, Profession):

1) Understand regulatory bodies (e.g. the Joint Commission, DPH, CMS, ISMP) and the importance/applicability of compliance standards
2) Become familiar with common financial terms and reporting metrics that help define success for a department/organization
3) Explain the implications for pharmacy reimbursement within the current health care environment
4) Understand the sources of revenue for the pharmacy and health system
5) Understand the pros and cons of benchmarking data
6) Describe techniques for recruiting and retaining talent to support the leadership agenda in your department
7) Identify opportunities for change in the department and develop an implementation plan that incorporates change management techniques.
8) Understand the role of pharmacy in medication safety
9) Explain the role of pharmacy organizations and associations and leadership opportunities
10) Understand importance of publishing/research in professional literature

Applicable PGY1 Residency Goals:

Goal R1.4: Demonstrate ownership of and responsibility for the welfare of the patient by performing all necessary aspects of the medication-use system.

Goal R2.1: As appropriate, establish collaborative professional relationships with members of the health care team.

Goal R3.1: Exhibit essential personal skills of a practice leader.

OBJ R.3.1.1   (Characterization) Practice self-managed continuing professional development with the goal of improving the quality of one's own performance through self-assessment and personal change.

OBJ R3.1.2   (Characterization) Demonstrate pride in and commitment to the profession through appearance, personal conduct, and association membership.

OBJ R3.1.3   (Characterization) Act ethically in the conduct of all job-related activities.

Goal R3.2: Contribute to departmental leadership and management activities.

OBJ R3.2.1   (Synthesis) Participate in the pharmacy department's planning processes.

OBJ R3.2.2   (Comprehension) Explain the effect of accreditation, legal, regulatory, and safety requirements on practice.

OBJ R3.2.3   (Comprehension) Explain the principles of financial management of a pharmacy department.

OBJ R3.2.4   (Synthesis) Prioritize the work load, organize the work flow, and check the accuracy of the work of pharmacy technical and clerical personnel or others.

Goal R3.3: Exercise practice leadership.

OBJ R3.3.1   (Synthesis) Use knowledge of an organization's political and decision-making structure to influence accomplishing a practice area goal.
  - *Explain the importance of networking in achieving practice area and other professional goals.*

OBJ R3.3.2   (Comprehension) Explain various leadership philosophies that effectively support direct patient care and pharmacy practice excellence.

OBJ R3.3.3   (Application) Use group participation skills when leading or working as a member of a committee or informal work group.

OBJ R3.3.4   (Application) Use knowledge of the principles of change management to achieve organizational, departmental, and/or team goals.

Goal R4.1: Conduct a practice-related project using effective project management skills.

Goal R6.1: Use information technology to make decisions and reduce error.

Activities/Projects:

During the course of the rotation/longitudinal experience, the learner should participate in some of the following activities or projects as assigned by the preceptor.

1) Watch at least one of the following videos and discuss your impression with the preceptor:
    - ASHP Foundation Leadership videos
        i. http://www.ashpfoundation.org/MainMenuCategories/CenterforPharmacyLeadership/LeadershipVideos.aspx
    - Whitney Award Winner Videos
        ii. http://www.harveywhitney.org/
2) Complete a leadership self-assessment on the ASHP Foundation Leadership Website
    - http://www.ashpfoundation.org/selfassessment/
3) Complete a leadership related journal article review and presentation to staff/students/interns/residents
4) Complete a weekly reflection (within a journal) to describe and reflect on an activity from the week. Questions to address:
    - What did you expect to learn from this activity?
    - How did this activity build upon previous knowledge?
    - What did you learn from this activity?
    - How will you apply this information to future clinical practice?
    - How could this activity be improved in the future?
5) Review examples of leadership resources:
    - ASHP Center for Health-System Pharmacy Leadership, Leadership Resource Center (http://www.ashpfoundation.org/MainMenuCategories/CenterforPharmacyLeadership/LeadershipResources.aspx)
    - ASHP Practice Manager www.ashp.org/practicemanager
    - Center for Creative Leadership www.ccl.org
    - Harvard Business Review http://hbr.harvardbusiness.org/ (**Recommend signing up for daily tips)
    - Emotional Intelligence http://www.eiconsortium.org/
6) Write a summary analysis differentiating "leadership" from "management" to demonstrate a baseline understanding of the key differences between both these concepts.
7) Write a personal mission statement, reflecting on the philosophy of leadership
8) Review and assess departmental organizational chart
9) Prepare a pharmacy schedule with assignments
10) Spend one day shadowing each of the leaders in the department. The learner should note teamwork and communication styles, mentoring and networking opportunities, customer service and critical conversation techniques, and identify opportunities to improve leadership. The learner should provide a written summary of the experience and present to the preceptor.

11) Meet with key, non-pharmacy personnel in the system to discuss successful leadership strategies and planning for organizational strategic initiatives such as:
    - Chief Executive Officer (CEO)
    - Vice Presidents or other important individuals in the system (e.g. within divisions of Nursing, Medicine, Marketing, Finance, Ancillary Services, etc)
12) Complete a culture assessment of the organization by using the culture worksheet.
    - http://www.ashpfoundation.org/leadershiptoolkit/
13) Attend various pharmacy and interdisciplinary meetings relative to leadership or collaboration, such as:
    - Pharmacy and Therapeutics Committee (P & T)
    - Department Leadership/Management meetings
    - Department Staff Meetings
    - Institutional Review Board (IRB)
    - Regulatory preparation meetings (e.g. Joint Commission, Department of Public Health, etc.)
    - Activities can include: agenda preparation, minute preparation, topic presentations and leading the meeting
14) Participate in a medication safety trending and analysis, root cause analysis (RCA), or failure mode effects analysis (FMEA) or other related medication safety functions (e.g. adverse drug reaction (ADR) reporting, medication error or safety event reporting and analysis)
15) Participate in the development of a medication use protocol
16) Discuss the roles of pharmacy leaders related to:
    - Local, state, national organizations
    - State boards of Pharmacy
    - Legislative actions
    - Role in the Food and Drug Administration (FDA), Drug Enforcement Agency (DEA), Center for Medicare and Medicaid Services (CMS)
17) Participate in a Supervisor-on-call, Pharmacist-in-charge, or similar program, gaining experience in problem solving (e.g. addressing sick calls, drug shortage issues, non-formulary requests, etc.)
18) Complete the Institute for Safe Medication Practices (ISMP) Medication Safety Self Assessment 2011 or review one section to develop an action plan for the department
19) Review or complete the ASHP Pharmacy Practice Model Initiative (PPMI) 2011 Self Assessment tool or review one section to develop an action plan for the department
20) Develop and implement a compliance action plan for the department

Topic Discussions:

As time permits, preceptors and learners should schedule meetings when they can discuss various topics. Background readings should be provided when available (Note: there are some suggested readings listed with topics below). The learner should be expected to lead at least one topic discussion towards the end of the rotation/longitudinal experience.

Potential Topics

- **Manager vs. Leader**
    - Zaleznik A. "Managers and Leaders: Are they different?" *Harvard Business Review* January 2004
    - Nahata MC. "Balancing leadership and management." *Am J Pharm Educ* 2001; 65:295-6

- **General Leadership**
    - ASHP statement on professionalism. *Am J Health-Syst Pharm* 2008; 65:172–4.
    - ASHP statement on the roles and responsibilities of the pharmacy executive. *Am J Health-Syst Pharm* 2009; 66:499–502.
    - Holdford DA. "Leadership theories and their lessons for pharmacists." *Am J Health-Syst Pharm* 2003; 60: 1780-6.
    - White SJ. "Will there be a pharmacy leadership crisis?" An ASHP Foundation Scholar-in-Residence report. *Am J Health-Syst Pharm* 2005; 62:845-55.
    - Covey, SR. The 7 Habits of Highly Effective People. New York: Free Press; 1989.
    - Kerr RA, Beck DE, Doss J, et al. "Building a Sustainable System of Leadership Development for Pharmacy: Report of the 2008-09 Argus Commission." *Am J Pharm Educ* 2009; 73(suppl):S5.
    - White, SJ. "Leadership: Successful Alchemy" *Am J Health Syst Pharm* 2006 63: 1497-1503.
    - Jastrzembski, JB. "Developing leadership skills." *Am J Health Syst Pharm* 2007 64: 1900-1903.
    - Goffee R and Jones G. "Why Should Anyone Be Led by You?" *Harvard Business Review* 9 (2000): 1-7.
    - Collins J. "Good to Great: Why Some Companies Make the Leap... and Others Don't." New York, NY: HarperBusiness, 2001.
    - George W, et al. "Discovering your authentic leadership" *Harvard Business Review* February 2007.
    - Schaffer R R. "Four Mistakes Leaders Keep Making." *Harvard Business Review* September 2010.
    - Goleman D. "What makes a leader?" *Harvard Business Review* January 2004.
    - Derescewicz W. Solitude and leadership, American Scholar, Spring 2010.
    - Abrashoff DM. *It's Your Ship. Management Techniques From the Best Damn Ship in the Navy.* Warner Business Books, New York. NY 2002.

- **Clinical Leadership/Non Traditional Leadership**
  - The American Society of Health-System Pharmacists Research and Education Foundation Center for Health-System Pharmacy Leadership Student and New Practitioner Leadership Task Force. Final Report: Leadership is a Professional Obligation (2009). www.ashpfoundation.org/MainMenuCategories/CenterforPharmacyLeadership/AbouttheCenter/StudentNewPractitionerLeadershipTaskForce/SNPFinalReport.aspx
  - Johnson PE, Austin J, Murphy-Enright S. Managing the outlander syndrome. *Am J Health Syst Pharm* 2012;69:612-614.

- **Leading People** (Coaching/Counseling/Evaluations)
  - Goffee R and Jones G. "Why Should Anyone Be Led by You?" Harvard Business Review 9 (2000): 1-7.
  - White SJ and Scott BE. Progressive Discipline, *Am J Health-Syst Pharm* 1984; 41:1824-1828.

- **Leading Implementation and Driving Results**
  - Longenecker CO and Simonetti JL. Getting Results. San Francisco, CA. Jossey Bass, 2001

- **Mission/Vision**
  - Review organization and department mission/vision statements
  - Gottleib Hildy. Three Statements that can change the world: mission, vision values. ReSolve, Inc. 2007. Accessed 5/31/11 at http://www.help4nonprofits.com/NP_Bd_MissionVisionValues_Art.htm

- **Strategic Planning**
  - Kaissi AA, et al. Strategic Planning Processes and Hospital Financial Performance. Journal of Healthcare Management May/June 2008: 53:3.

- **Communication**
  - McDonough, RP and Bennett MS. Improving Communication Skills of Pharmacy Students through Effective Precepting. American Journal of Pharmaceutical Education 2006; 70 (3) Article 58.

- **Time Management**
  - Covey S. *First Things First*. Simon & Schuster. 1994
  - Organizing for Leadership, Time Management Self Assessment. Accessed 5/31/11. http://www.ashpfoundation.org/leadershipprimer/

- **Work Life Balance**
  - White S. "Integrating your personal life and career." *Am J Health-Syst. Pharm* 2007;64: 358:360.

- **Networking**
  - Ibarra H and Hunter M. "How Leaders Create and Use Networks." *Harvard Business Review* January 2007.

- **Social/Emotional Intelligence**
  - Goleman D and Boyatzis R "Social Intelligence and the Biology of Leadership." *Harvard Business Review* September 2008.

- **Critical/Crucial conversations**
  - Patterson K. *Crucial Conversations: Tools for talking when stakes are high*. McGraw-Hill 2002.

- **Stressful situations**
  - Zilz DA, Woodward BW, Thielke TS, Shane RR, Scott B. "Leadership skills for a high-performance pharmacy practice" *Am J Health Syst Pharm* 2004 61: 2562-2574.
  - Pocket Mentor. Managing Stress. Boston: Harvard Business School Publishing; 2007.
  - Heifetz R, Grashow A, Linsky M. Leadership in a permanent crisis. Harvard Business Review July 2009.

- **Recruitment**
  - Martin J and Schmidt C. "How to Keep your Top Talent" *Harvard Business Review* May 2010.

- **Mentoring**
  - Fotis M, "The Nuts and Bolts of Mentoring." KeePosted December 2010 36:10.
  - White, SJ, Tryon JE. "How to find and succeed as a mentor." *Am J Health-Syst Pharm* 2007, 64: 1258-1259.
  - Wensel TM. "Mentor or preceptor: What is the difference?"*Am J Health-Syst Pharm* 2006: 63: 1597.
  - Pierpaoli PG. "Mentors and residency training." *Am J Health-Syst Pharm* 1990: 47: 112-113.
  - Webb JW. Harvey A.K. Whitney lecture. "The art of growing professionally." *Am J Health-Syst Pharm* 1986: 43: 1923-1926.
  - Emmons BF. "Standing in the shadow of greatness." *Am J Health-Syst Pharm*: 2008: 65: 360.
  - Kleinmann K. Harvey A. K. Whitney Lecture. "We really do care**." *Am J Health-Syst Pharm* 1994: 51:2011-2015.
  - Altman JS. "The value of mentorship" *Am J Health-Syst Pharm* 2005: 62: 2474-2477.
  - Meyer S. "Thank Goodness for Mentors". KeePosted February 2008.
  - Stice K. "Mentoring a Key Step in Professional Development**." KeePosted June 2010.

- **Generational Differences**
  - Zemke, R., Raines, C., & Filipczak, B. *Generations at work: Managing the clash of veterans, boomers, Xers, and nexters in your workplace.* New York: AMACOM. 1999.
  - Stanton Smith W. *Decoding Generational Differences: Fact, fiction … or should we just get back to work*". Deloitte LLP, 2008.
  - Meister JC, Willyerd K. Mentoring Millennials --- Harvard Business Review May 2010.

- **Management Styles/Competence**
  - Veninga, R L.; Cliffs, E. "The Human Side of Health Administration." Prentice Hall, Upper Saddle River. NJ, 1982.

- **Teamwork**
  - Jones GR and George JM. The Experience and Evolution of Trust: Implications for Cooperation and Teamwork. Academy of Management Review 1998: 23;3 531-546.

- **Trust**
  - Covey S. "The Speed of Trust: The One Thing that Changes Everything." Pages 1-40
    - Describe at list 5 trust and character behaviors, give examples and explain the importance of each behavior.   (straight talk, transparency, respect, loyalty, trust, commitments, accountability, listening)

- **Customer Service**
  - Lee F. *If Disney Ran Your Hospital*. 9 1/2 things you would do differently.

- **Hardwiring excellence**
  - Studer Q. *Hardwiring Excellence.* Chapter 2 and 9

- **Change Management**
  - Kotter JP. "Leading Change: Why Transformation Efforts Fail" *Harvard Business* Review January 2007.
  - Strebel P. "Why do Employees Resist Change" *Harvard Business Review* May-June 1996
  - Any publication by John P. Kotter.

- **Innovation**
  - Rogers E. Diffusion of innovation theory. 1995

- **Medication Safety**
  - Institute of Medicine Quality Reports. *To Err is Human* & *Crossing the Quality Chasm* Executive Summaries.
  - Core measures and compliance with quality of care standards.

- **Performance Improvement**
    - Six Sigma and Lean topics
    - Project management skills topics
    - Balanced Scorecards topics
        - Kaplan, R and D. Norton. "Using the Balanced Scorecard as a Strategic Management System" *Harvard Business Review* July-August 2007

- **Personal Change**
    - White SJ. "Managing yourself so others want to work with you*." Am J Health-Syst Pharm* 2008 65: 922-925.
    - *Who Moved My Cheese?* By Spencer Johnson
    - Covey SR. *The 7 Habits of Highly Effective People.* New York: Free Press, 2004. Personal vision, personal leadership, personal management, interpersonal leadership, Empathic Communication, creative cooperation, balanced self-renewal
    - Buckingham M and Clifton D. *Now, Discover Your Strengths.* Simon & Schuster 2001.
    - Rath T. *Strengths Finder 2.0*. Gallup Press 2007.

- **Delegation**
    - http://www.mergespeaks.com/delegation/ (complete delegation assessment)
    - Fleming RS. The Role of Effective Delegation in Professional and Organizational Success. The Business Renaissance Quarterly: Enhancing the Quality of Life at Work.

- **Decision Making**
    - Martin R. "How Successful Leaders Think" Harvard Business Review June 2007.
    - Snowden D and Boone M. A Leader's Framework to Decision Making. Harvard *Business Review* November 2007.

- **ASHP Statement on Professionalism, ASHP Code of Ethics for Pharmacists, ASHP Policy Positions on Ethics**

Evaluation:

The preceptor will evaluate the learner on achievement of the predefined goals and objectives for the rotation/longitudinal experience as required. Learners will also be asked for any specific personal goals for the rotation/longitudinal experience. Additionally learners will be evaluated on their interactions with staff (including pharmacists and pharmacy technicians within the organization), as well as through daily topic discussions with the preceptor. Evaluations should include mid-point or snap-shot assessments, as well as a final evaluation at the conclusion of the rotation/longitudinal experience, as required.