



HOW TO BUILD AN INTENTIONAL CULTURE

At the Institute for Healthcare Improvement they truly practice what they preach

By Nicki Roth, Co-founder, Saroga Nonprofit Leadership Forum

When an organization's culture, its DNA, is acknowledged as a significant asset it can accomplish three things that are the envy of all. It can attract and retain the brightest and most talented people. It can engage and sustain long-term relationships with customers. And it can support a mission to achieve big, bold goals. Sadly, few organizations identify their cultures as a valuable advantage; the ingredient that makes everything work. Most would say just the opposite. For them, culture interferes with daily activities and eats up precious time and resources.

The Institute for Healthcare Improvement (IHI), a nonprofit organization, is a shining example of what is possible when founders, leaders and staff join forces to create and nurture a culture that puts the mission and the people front and center.

IHI at a Glance

The Institute for Healthcare Improvement (www.ihl.org) is an independent nonprofit organization that works with health care providers and leaders throughout the world to achieve safe, effective and economically sustainable health care. IHI focuses on motivating and building the will for change, identifying and testing new models of care in partnership with both patients and health care professionals, and ensuring the broadest possible adoption of best practices and effective innovations. Based in

Cambridge, Massachusetts, IHI mobilizes teams, organizations, and increasingly nations, through its staff of more than 100 people and partnerships with hundreds of faculty and affiliates around the world.

The work began in 1986 with Donald M. Berwick, MD at the helm with a grand vision, an aggressive strategy and a handful of people with a grant from the John A. Hartford Foundation. By 1991 the legal entity of IHI was formed and the organization has grown in size, impact, expertise and stature. The goal was always to increase its reach to implement changes to improve worldwide health and health care delivery and outcomes while reducing waste and cost. Although the staff size has grown steadily over the years, IHI is intent upon keeping the core organization as small as possible.

Today Dr. Berwick has completed two years as the Administrator for the federal Centers for Medicare & Medicaid Services in Washington DC and continues to provide counsel on healthcare policies. The former COO, Maureen Bisognano, is now President and CEO of IHI.

The Evolution of an Intentional Culture

When Don Berwick began the earliest incarnation of IHI with those few people, his actions set the tone and expectations for the culture. He demonstrated respect and care towards everyone he encountered, much like the best "bedside manners"

we would all hope to receive from our physicians. The staff understood the message: "We care about each other."

In the first 5-7 years as the organization grew to a whopping 15 people that attitude of care and respect persisted. The atmosphere was industrious, energetic, friendly and fun. When Maureen Bisognano (formerly CEO at the Massachusetts Respiratory Hospital and SVP at the Juran Institute) came on board as the COO and EVP in 1995, she and Berwick spent numerous hours talking about and researching ideal organizational cultures. They felt strongly that as IHI grew they wanted to ensure that how people treated each other, what values they lived by, what type of physical space best reflected their aims and how they interacted with their customers and partners should be explicit and central to the IHI identity.

Berwick and Bisognano visited several companies and had many conversations with corporate and nonprofit CEOs to explore what others were doing about culture, learning and physical space. They were most influenced by their encounters with Jack Welch, then CEO of General Electric, and Paul O'Neill, then CEO of Alcoa. The GE operating values provided an example of clearly defining behavioral expectations and Alcoa's workspace gave Berwick and Bisognano ideas about how to build out new offices. Other organizations they visited served as good models for creating a learning environment.



Bisognano describes the creation of the IHI values in the book, *The Heart of Leadership* by Barbara Balik and Jack Gilbert.

*“Don and I developed them in one long car trip and presented them to the staff. We didn’t go through one of those year-long processes. The staff added one value: celebration and thankfulness.”*¹

The complete list of values is embossed on every IHI coffee cup and stenciled on the walls.

1. **Without Boundaries:** The people of the IHI compose a single organization, with common systems, common knowledge, and unconditional teamwork.
2. **Speed and Agility:** We change our own work and respond as quickly as the health care systems we serve need us to. Our past work need not ever be our future work. We are always willing to change.
3. **Focus on Subject Matter:** Our concerns are health and health care; we are not wedded to specific methodologies. We remain always open to new approaches to the continual improvement of care. Results for patients and communities define our success.
4. **Valuing Volunteers:** We network together people who have expertise and knowledge, so that they can teach each other, help others, and improve the work of IHI. These people are our “faculty.” Their work is the lifeblood of the IHI. We will make their experience with IHI the most

satisfying of their professional lives.

5. **Customer Focus:** To achieve our mission, we must serve and delight those who shape and deliver health care. Their satisfaction – 100% satisfaction – is our uncompromising aim, in everything that we do.
6. **Honesty:** To achieve our mission, we must earn and preserve the trust of those we attempt to help. To do so, we must tell the absolute truth about ourselves and our work, reporting both failures and successes with equal discipline, and seeking the views and opinions of people outside our organization.
7. **Transparency:** We are an institute without walls. Those who work with us, no matter where or when, should feel informed and welcomed. We work always in daylight.
8. **Orderliness:** Disorder is waste, which neither we nor health care can afford. We will be lean in our work, and continually reduce waste and disorder. We practice what we teach.
9. **Celebration and Thankfulness:** Our mission is long, and our work is not easy. We take time to look back, as well as forward, to thank each other, and to take pride in what we do.²

As a list of organizational values go, this one is not especially unique. You will see some of these posted in offices anywhere you go. What is different is how evident these behaviors are when you interact with any IHI staff member or visit their office.

To a person at IHI, these values are not just pretty words. They establish the core of the IHI culture

and everyone is expected to abide by them. One leader said, “We don’t talk about values. It is our ethos.” Even before these values were codified, the staff had written their own document. While most organizations have an Employee Handbook, IHI has a Citizenship Guide. You get a clear sense of tone and orientation from the preamble.

*We are the people of the Institute for Healthcare Improvement. We believe that, to build and sustain a successful organization, we must embrace a culture characterized by personal commitment to each other, our customers, and our work. We define commitment as an understanding, acceptance, and active participation in the shared responsibility to meet needs and obligations. We recognize that, as individuals and as an organization, this commitment must be supported by clear statements that help us identify how we are each expected to conduct ourselves, and how we each would like to be treated.*³

The final artifact for this intentional culture is The Reputation. This takes an outside-in view of IHI. It spells out what the leaders want people outside of the organization to think about IHI and links to the values and behavioral principles laid out in the above-mentioned internal documents. It reads in part...

¹ page 89

² Internal Document, IHI

³ Internal Document, IHI



“...IHI is a continual delight to work with. All the people there – both in Boston and in dozens of other places – are intensely focused on their Mission above all: “to improve the lives of patients, the health of communities, and the joy of the health care workforce.” The people of IHI are generous, honest, transparent, and experts in improvement... They respond with breathtaking speed, and they are always respectful, dignified, and affirming. They share what they know... They are one team, seamless.”⁴

Together these credos make it very clear how people are to interact with each other, how the work is to be approached, how customers are to be treated and how to keep learning as professionals in this field.

Building this strong, deliberate foundation of an intentional culture gives IHI a unique identity among its peer organizations. This is the “secret sauce”, the “golden orb”, the “magic” – all words that staff and customers use. These clear behavioral expectations provide guardrails and, to a large extent, people do a good job of self-monitoring to abide by these norms.

Physical Space

As deliberate as Berwick and Bisognano were about crafting values and principles to live by, they also took care to create an office environment that would reflect them. There are offices around the perimeter of the space that have glass walls.

Three to six people sit in each of these offices (including the CEO) sharing the space. Cubicle pods are in the center of the suite and the partitions are low. The workspace fosters the values of no boundaries, transparency and efficiency. If you lift your head up from your workstation you can find the person you are looking for with little neck craning. Windows allow in a great deal of natural light (good for brains and emotions), the kitchen is equipped with washable cups and tableware (the entire system designed using their lean methods), meeting rooms can expand or contract to accommodate small and large groups and there are lounge areas on both floors where people can work in teams or just hang out. The glass walls are frequently marked up with working notes from a team meeting and the permanent walls are filled with photographs from projects around the world. And if you wander in during the summer months you might see posters from the annual IHI Olympics (evidence of Celebration and Thankfulness!).

Adjusting to shared space and extreme openness is initially difficult for most senior staff that came from private offices with closed doors and opaque walls. They struggle to find quiet places to write or screen out distractions but they ultimately assimilate. Wearing earphones signals to others in the office that someone is participating in a webinar or phone conference and office mates respond by speaking quietly, not talking or taking their discussions elsewhere.

The grand idea behind the design is to encourage “accidental”

conversations, keep the flow of information as fluid and transparent as possible, make space for teamwork and create the feeling of inviting others into the IHI home.

The Culture in Action: Attracting and Developing Talent

Most organizations think about acquiring and nurturing talent in narrow terms; that’s a hiring thing, it’s Human Resources’ job, let’s get management involved if we can. At IHI everyone is thinking about whom to bring on board and everyone is involved in maintaining an attractive work environment to keep people engaged and satisfied.

Acquiring Talent

To be hired at IHI you must be very smart, have a lot of productive and positive energy, have the necessary skill set and be a good fit with the culture. That’s the baseline for everyone. The recruitment process itself is a bit like traffic rules in many cities – merely suggested guidelines. In some cases there is a clearly defined title and job description but no known candidate. At those times there is a standard process that is followed much like observing street signs. In other cases there is a very talented person who is known by many but no open job position. This is when improvisation takes over, where alternative routes are explored. This constant jiggling back and forth between filling open positions and finding spots for great people is perfectly acceptable by all and usually results in bringing talent on board who thrive and stay.

⁴ Internal Document, IHI



Implied in this approach is a fluidity of shifting job responsibilities to make room for unexpected new people or redesigning positions if no viable candidates emerge or changing supervisors to find the best fit.

Many organizations will say they take this dual approach but, in my experience, making room for a must-have person is not an accepted norm. Not to mention that it creates distress in the system. In fact, how I got connected to IHI was typical of finding a good people fit that didn't necessarily have an exact functional fit.

I received an email from Rosanne Haggerty, President and Founder of Common Ground, an organization committed to ending homelessness, based in New York City. She had copied Maureen Bisognano, then COO of IHI. It was one simple sentence. "The two of you should meet." An email from Bisognano quickly followed and a meeting was scheduled. I did a little research and thought, "I wonder why Haggerty is making this connection."

I arrived for our meeting and Bisognano greeted me with a warm smile and handshake. Her first words were, "Do you have any idea why you are here?" I was so delighted and disarmed by this that I laughed and said, "Absolutely no idea whatsoever. But I always follow Rosanne's lead." She led me into her office and explained who else usually sat at the vacant desks. "Don Berwick (the founder and then CEO) sits over there and two fellows sit over there. Now tell me a bit about yourself. What is your passion? Where did you grow up? What is

next for you?" After sharing our brief biographies with each other she insisted on giving me the grand tour of the office. Mind you, I still didn't know why I was summoned and I still hadn't asked how I could be helpful.

So off we went on the tour. As we walked Bisognano told me about the history and work of IHI, key projects and milestones and lots of stories that reflected this unique culture. It wasn't until we were finally back in her office that I asked her how I could be helpful. She launched into her thoughts and questions about finding the right executives for nonprofit organizations. As I shared my insights with her I kept interrupting myself to remark, "But your culture is so unique that beyond the usual wisdom, fit is going to rule the day. This place is so different and not everyone will thrive here."

Our conversation concluded. We both felt it was a good exchange and there were promises to stay in touch. A couple months and a couple discussions later I was asked to help IHI conduct a search for a new executive. When I said, "You know that's not my main skill set, right? It's something I can do but I'm not a recruiter." "Oh sure, we know that. But we're not getting anywhere using a traditional process and you get us. Would you be willing to create a better process and walk us through it?" Of course I accepted the assignment. Months later when I was presenting Bisognano with viable candidates for the executive position she said, "You know that is why Rosanne had me meet you in

the first place. I was interviewing you for this executive role." Aghast I said, "But you know that I am totally unqualified for this position! You couldn't have been interviewing me!" "Of course I was," she said. "When a person I trust says I should meet someone, that there might be a good connection, I follow up on that."

With the exception of a few people I interviewed for this paper, the staff had similar tales to tell about how they came to work at IHI. "I was just meeting my friend (who works at IHI) for lunch and she asked if two other people could join us. I wasn't sure what to make of it but said okay. They were all asking me questions about myself. Friendly. Low key. I went back to my job thinking that was an interesting conversation. The next day I got a call asking if I would come in to meet a few more people to continue the interview process. Interview process?! I had no idea that was what happened. Naturally I came back and went through a very extensive vetting process that included many people and many hours. This gave all of us an opportunity to learn more about each other. I've been here ever since." As IHI has grown, the need to engage in more standard recruitment practices has exceeded the entry through staff networking.

It is that combination of smart, energetic, qualified and fit and the willingness to supplement traditional hiring processes with staff relationships that helps IHI staff and potential candidates make a meaningful connection. Ultimately it is that connection that signals the green light. No simpatico, no-go.



Developing Talent

“Follow your passion” is an active verb at IHI; not a platitude. If you are in finance but are interested in the work being done in Malawi, you can join the team. If you are a Director but want to become a subject matter expert that can happen. If you’ve been devoted to hospital settings but are drawn to small community health clinics, you can cross lines. And you may not know a thing about improvement methodologies but you can be thrown into the mix to lead a project and learn by doing. IHI may not have all the formal systems and processes in place but it is truly a learning organization in the Peter Senge tradition. Career paths and professional development is not structured (yet) but it takes place nonetheless. When I asked “what makes you stay here” most people told me that the opportunities to learn new skills and to take on new roles makes it unnecessary to leave. If they felt the well had dried up they would be forced to go someplace else to continue to grow.

Creating an Engaging Environment: Fostering Talent and Customer Relationships

In my conversations with staff I asked everyone to tell me stories that encapsulated the unique traits of the culture that contributed to the reasons why they continued to thrive at IHI. Everyone had their favorite tale to tell and I noticed that several themes emerged. People spoke repeatedly about their connections to colleagues, unlimited access to leaders, enthusiasm about the customers and the improvement

work as well as their passion for the mission. Zeal for improving health care is the price of admission so let me focus on the other themes.

To a person, everyone I spoke with said, “You have to write about the staff meetings. If you want to get a snapshot of our culture, it’s the staff meeting that says it all.” Not only does the staff look forward to this weekly gathering but visitors rush back to their own offices to recreate the process and gestalt of these meetings.

Every Monday at 9 am IHI has an all-staff meeting. The walls of the conference rooms are folded away to provide theater seating for 100 people. There is a U-shaped set of tables that seat about a dozen people in the middle of the room. A split screen is at the front of the room; the large area for slides and a sidebar for the internal Twitter account. The phone modem is on the table and people from multiple locations are dialed in. A staff person facilitates the meeting, handing the microphone to the presenters and keeping things moving. Bisognano usually tells a story about a patient who was helped by their work or addresses an issue that came up in the news over the weekend or opts for comic relief with a YouTube video. In succession, staff members make succinct and engaging presentations being certain to involve those on the phone or to respond to a tweet. The agenda items are a combination of reporting on project results, asking for input on an internal initiative, raising ideas for further research, telling poignant stories and celebrating and thanking people for their good work. An hour

later everyone files out or signs off and the week’s work begins.

Anyone can attend the staff meeting -- and many visitors do. They are introduced and fussed over and included in the conversation. Conference attendees and visitors alike are wowed by these meetings and vow to take the lessons back to their own organizations. What did they learn? They saw with their own eyes that a meeting does not have to be run by the CEO, people can be interested and engaged in a routine meeting, an intern or manager or executive can be an effective presenter, it can start and end on time and be very efficient, remote staff can actually participate and people can enjoy themselves. Amazing. We’ve all sat through hundreds of staff meetings but how many have you looked forward to and how many left you feeling buoyant or thoughtful?

Connection to colleagues

“We’ve gotten so large that I no longer know everyone’s name. I feel awful walking down the hall and not being able to say hello so-and-so to some newer folks. I need to get to know these people.” I heard this from nearly half the people I interviewed. Pleasantly greeting each person by name is de rigeur and many felt it was a dropped link in the chain of interpersonal interactions.

Care and connection with colleagues is fostered in many small ways. Knowing about each other’s families and vacations and triumphs and pressures creates a camaraderie and sensitivity that greases the wheels of constant teamwork and deadlines. If John knows that Susan is worried



about her mother's health, his gentle inquiry early in the day helps Susan feel acknowledged. She can tuck this away and get to the work at hand when she and John sit in a project meeting in the afternoon.

But there are also many planned activities that help staff get to know each other. There is a Fun Team that plans playful events such as baseball outings or in-office golf tournaments. There is an annual IHI Olympics that matches up teams of people who don't often work together to compete against each other. There are multiple retreats during the year where part of the agenda is reserved for team building.

There is also an adage instilled in all staff members. "Never worry alone" encourages people to reach out, voice concerns early and ask for help.

All of these formal and informal efforts allow people to get to know each other so they can perform at a high level. Nearly everything is done through teams or with input from others at IHI. Even individual contributors must consult with others to complete their work products. With teamwork as the primary modus operandi it makes sense that such attention is given to making connections and getting to know each other.

Access to leadership

Easy access to leaders and managers was cited as a positive and inclusive element of the culture. Going back to Berwick and Bisognano's construction plans for the office suite, glass walls, open doors, fluid traffic flow were all part of their desire to

limit barriers to communication. I spoke with people at all levels and in all functions and everyone mentioned the value of being able to speak regularly and freely with anyone in the organization regardless of role or tenure. Almost all meetings are open to anyone, people drop into each other's offices constantly, leaders stop and chat with staff and Bisognano leaves a bowl of candy on her desk to ensure that people will stop by. Again, there is a great degree of intentionality to generate the constant flow of information and ideas.

At IHI hierarchy is a dirty word. It is viewed as an obstacle to keeping all communication channels open. Once you are put in a box you might not venture out of it or think you can't cross over into another box.

Bisognano says it best. "*When people ask me "Can I look at the organization chart?" I say we don't have one. I ask them why they need one. People say, "We need to know who reports to whom." If you need a chart to tell you that, then you have a deeper problem of communication that a chart will not fix.*"⁵

When pressed, she can actually show you a formal organization chart but its sole purpose is to diagram core functional responsibilities and supervisory relationships. Bisognano much prefers to have a conversation with the right people in the room to focus on a specific issue rather than include or exclude staff based on reporting structure.

People at all levels told me stories about hallway conversations with executives that made a difference. "In my first months I was struggling and shared that with one of the leaders. He reassured me that I was doing fine and that everything would settle into place for me and that I shouldn't waste one minute being worried. Those quick words helped me to relax and get on with things." "I was talking with a colleague outside one of the conference rooms where a large meeting was being held and we both burst out laughing over something. Just then one of the executives walked by. I was certain we would be scolded but instead she said that laughter was always acceptable – even outside an important meeting."

As busy as everyone is, making time to have ongoing discussions is routinely scheduled into many people's calendars. These can be project updates, formal supervision or development, touching base or just a good old brain picking session. The protocol in every meeting is to make space for all to contribute – from college interns to senior executives. The notion that a good idea can come from anyone or anyplace is the IHI mantra so access to leaders and meetings is critical.

Enthusiasm for the customers and the work

When I asked if the IHI culture has an impact on the client facing work, the staff agreed that it did. They told stories about specific client engagements, meetings with people from other industries, personal health care anecdotes and the large annual

⁵ Balik, Barbara and Gilbert, Jack, *The Heart of Leadership*, AHA Press, 2010. Page 83



Forum that is held in Florida every year (see sidebar).

One senior person put it this way. “When we show up at the client site we embody IHI values. We challenge clients to move towards our mission because we strongly believe that is what is necessary to improve health care. We are respectful but challenging. We tell the truth and partner with them to become best in class rather than merely meeting a benchmark. We press them to think bigger and let them know we are with them every step along the way.” IHI staff and faculty sound and act differently than other professionals their customers encounter. The mix of support, challenge and unwavering respect form the foundation of very long term relationships with customers and faculty members.

I was surprised to hear about the steady stream of visitors from other sectors such as power generation, education, supportive housing and social services. Not only are they interested in learning improvement, quality and lean methodologies for their work but they are also interested in implementing aspects of the IHI culture. Staff is especially generous with their time and support for these guests, even though it is not part of their core responsibilities. They are pleased to give away whatever they have learned.

Everyone touches health care. We all see doctors for prevention and for illness. Our friends and family seek medical care. We all have stories. At IHI these stories become tales of celebration or distress. Either way, it is cause to

DO TRY THIS AT HOME

Culture is one of the most difficult things to change about an organization. Culture is human behavior and personalities and history and sacred norms and habits. To transform a culture means changing how human beings operate and interact – a very tough challenge.

That said, if you want to create an environment that is modeled after IHI, here is some guidance.

1. Begin with a compelling mission. All roads lead back to the mission in an intentional culture. It must grab the heart and the imagination – not just the mind. If it is built around making a difference (in people’s lives, in advancing a specific field etc.) and if employees are connected to the recipients of the work, all the better. It needs to be the kind of mission that allows staff to feel they are making a meaningful contribution. A passionate mission can ameliorate a bad day, difficult organizational moments and challenging colleagues.
2. Values that are actionable and reinforced. This is organizational values 3.0. It is not the poster with the platitudes that no one notices anymore. It is a living document that defines how people interact with each other and clients in behaviorally specific language. Leaders must model the behaviors, reinforce them in others, embed them in management processes and address transgressions swiftly and respectfully. These values need to become a way of life rather than words on a piece of paper.
3. Create a hybrid structure and set of management practices. It’s not a hierarchy and it’s not a matrix. There is a clear functional and supervisory structure but it is not treated as etched in stone. The structure is there to define accountabilities and responsibilities but is intended more as a “homeroom base” to move in and out from to achieve the goals. Management processes need to be efficient, collaborative and created to facilitate work. Meetings or processes that become static will be counterproductive.
4. Establish a norm to try new things. Allow people to pursue their interests, join projects that are outside their skills or sit in on discussions on topics that are completely unfamiliar. With staff that you have come to trust, throw them into the deep end on some initiative. Have leaders do job swaps with staff. Help people cross into unknown territory so they can grow and develop professionally and personally – they can learn by doing.
5. Continuous flow of information and ideas. Some formal management activities can help but this type of communication goes well beyond that. Create a norm for popping into each other’s offices or hanging out in a common area or convening in a situation room or inviting new people into team meetings to discuss projects and new ideas. Lines of communication should be open, constant, on multiple platforms and crossed often.
6. Be deliberate about the physical space. Open spaces, natural light and open doors send a message. Determine what your message is and then create an environment that makes it an easy habit for employees to engage in specifically intended behaviors. If the office has lots of closed doors, for instance, there won’t be much interaction. If there are colorful visuals on all the walls, there will be an urge to be creative.
7. Create connections and interdependencies. This is the glue. Even if you fall short on the first six items, getting people engaged with each other can make an enormous difference in your culture. This includes continuous access to leadership, achieving goals through teamwork and being inclusive of all staff from all disciplines and at all levels. Building a sense of “we are all in this together” generates unsolicited helpfulness, shared celebrations and cohesion around the mission.



dissect what went right or what went wrong. It is common practice for anyone (CEO, manager or staff) to share a deeply personal health care story to highlight a specific issue for study. It could be about someone's mother who developed an infection post-operatively or a staff member who had a terrible emergency room experience or a wife who had subpar care during an extended illness. These stories get the team thinking about solutions or client projects or best practices. Why is

this worth mentioning? Think about other organizations. What would happen if staff routinely shared in meetings, "Let me tell you about my experience when my friend bought our product..." Anecdotes are viewed as unreliable data points and not valuable. Besides, this would be too personal for most companies. At IHI the paradigm is quite different. We are all consumers of health care and each tale is instructive. This keeps the staff very intimate with the work and interested in the outcomes.

It's Not Perfect

Lest you think that the IHI culture is a panacea where everything works as desired it is more like a 90-10 rule. Ninety percent of the time things run as I have described. But the other 10% can be challenging. I have come to think of it as a "dynamic tension."

In order to keep the flow of new ideas, be flexible enough to shift gears at any moment, be responsive to customer needs and maintain a high degree of collaboration then the structure and management processes need to be loose enough to accommodate these aims. On the other hand, once you have 120 staff members and hundreds of faculty associates an organization requires a certain degree of discipline to keep things running smoothly. This is an ongoing balancing act at IHI. They do use many of their own improvement tools to make modifications but this is (and will always be) an organic Rubik's cube. They are currently in a phase of examination and further development around management practices. The leaders and staff openly acknowledge that some things need tweaking but all keep the preservation of the cultural tenets at the core.

It is obvious to anyone who walks into the office that the IHI culture and environment is not for everyone. I was curious about people who either didn't get a job offer or decided to leave. When asked, "what type of person does not thrive here?" the list of attributes was consistent. Someone who requires a great deal of structure or hierarchy, someone who is not a self-starter and needs constant guidance, someone who needs

THE NATIONAL FORUM: PEAK EXPERIENCE OF IHI CULTURE

Every year IHI holds a national meeting in Orlando, Florida to gather together the community of professionals involved in health care improvement. In 2010 there were 6,000 attendees and another 15,000 on various remote platforms. Most organizations that host such a large event with so many moving pieces hire outside event planners to manage all the logistics. Not so for IHI. With only the assistance of the hotel staff, IHI employees plan and orchestrate the four-day event.

The buzz in the office heats up a couple months prior to the entire staff heading off to Florida. Teams are created, assignments are made and new people receive "blue shirt training." Efficiency and improvement tools are used to create a superior customer experience for the participants. In fact, when the size of the Forum got bigger than one venue could accommodate, the top two IHI flow experts did an assessment and implemented a plan for shuttle service between hotels that ensured no one would have to wait longer than three minutes for a bus.

When the entire IHI staff is gathered in Florida they don their blue shirts and khaki pants and receive a refresher course on expected staff behaviors throughout the four-day conference.

Blue Shirts are expected to reflect the best of IHI.

Specifically, they are to follow sixteen guidelines that include: Try not to use "no problem" but say "my pleasure" instead; Try to direct with an open palm instead of pointing; Have all difficult conversations with peers in private; Take every opportunity to delight customers and co-workers; Try to use participants' names if possible and introduce yourself.

A new staff person began the week in Florida feeling quite anxious. He was concerned about the long hours and the intensity. He just wasn't sure how he felt about all this. He was liking IHI so far but didn't want to be one of those people "who drinks the Kool-Aid." By the end of the week he was fully initiated, loving his blue shirt and the taste of that Kool-Aid. He felt part of something important and impressive. Everyone was in this together and working hard to create a well-orchestrated and spectacular experience for the attendees.

"It is the vision of our organization as it should be," Don Berwick has said about the annual Forum. "Everyone puts on a blue shirt. We are one team. Everyone is on the same page. That page is making things better for patients everywhere in the world."



individual (and frequent) recognition, someone who prefers to work alone or in private, someone who struggles when things are ambiguous and someone who exhibits overtly controlling behavior – these people will not like being at IHI and will not perform well. Most of these folks are screened out in the selection process. There are surprisingly few stories about staff that came on board and flamed out.

The first year at IHI is more confusing than it is at most organizations. Three to six months is the standard timing for on-boarding. With few exceptions everyone told me stories filled with frustration and confusion as they were figuring out how things get done. Not only is there a steep learning curve in terms of the work itself but imagine walking into a place where the organization chart doesn't provide much insight, just for starters. For those who came from more traditional settings it took some time to get used to shared office space, limited privacy, rapid change and fluid responsibilities. Then they had to sort out the relationships. Who needs to be included in conversations and decisions? How do personality quirks get addressed – or not? What's the best way to influence a discussion? It takes a full year for a person to make the adjustment and to understand all the cultural, performance and interpersonal dynamics. After that, the confusion fades away and life is good.

But You Can't Deny Success

In spite of the first year challenges and the frustration some feel about the loose nature of some organizational practices, the turnover rate at IHI (between 10-16%) is below the national average of nonprofits (16-21%⁶) or for-profit corporations (12-19% pre-recession⁷). Everyone I interviewed hoped for a very long tenure with IHI. Some have worked other places and wouldn't dream of going back into a more structured environment. All described the professional opportunities, camaraderie and passion for the mission as the main reasons for their satisfaction. They continue to have drive and energy to dramatically improve health care and remark that it is with this group of smart and talented people that they want to collaborate with.

“The culture trumps the individual skills. The most important thing is the mission of the organization and the culture. We hire people who enjoy the culture, then we let them use their own gifts, their own approaches, their skills, freely with regular connections between all of us.”⁸

All the recent data on employee engagement cite four criteria that keep people enthused about their work. Challenging assignments, face time with management, opportunities to learn and advance and connection to colleagues are at the top of the

list. IHI hits all these notes and more. Outsiders are constantly drawn to IHI. Customers who engage an IHI team end up being long-term collaborators and may assist on other projects. Peers and former colleagues of the staff clamor for a job opening. Authorities in the field want to enter conversations with the organization. This ardor from others is not just because of the mission and the good work that IHI performs. It is because of the “secret sauce”; the culture.

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⁶ *Philanthropy Journal*

⁷ *Workforce Management Journal*

⁸ Balik, Barbara and Gilbert, Jack, *The Heart of Leadership*, AHA Press, 2010. Page 81

