

## *Grassroots Advocacy Best Practices*

### **Program: Trustee Immersion Program**



Health System: Scotland Health Care System

Speaker: Greg Wood, President & CEO, Scotland Health Care System

Jane Rogers, Board Chair, Scotland Health Care System

**Brief description:** The Trustee Immersion Program is an opportunity for hospital board members to spend a day in scrubs and be deeply embedded into the hospital operations. Beyond a hospital tour, the immersion experience allows these hospital leaders to see the realities of healthcare in their region and to speak candidly with those who provide that care. The result is powerful new insights into management's challenges, the Board's mission, and the community's needs. Trustees leave as more informed and passionate hospital champions and advocates.

**Who is included:** Trustees volunteer to participate in the program and go through the experience 2 at a time, with a total of 6 participating in the first round. They then share their experiences by reporting back to their colleagues on the Board. There are future plans being discussed for hospital Foundation Board members, media, legislators, or others to also participate in the immersion experience, and to possibly offer shorter, ½ day sessions with a more targeted focus area to encourage more participation.

**Agenda:** After a few months of planning and coordination with key managers and Trustees, the program spans for a full day and includes meals and a debrief discussion. Beginning in the operating room, immersion participants follow along a typical patient's track from registration to recovery. Next, the team visits the inpatient units for nursing reports, huddles and safety call. The team then moves to the emergency room for a better understanding of their critical work, the realities of the behavioral health crisis, and the innovations improving patient care. Finally, Trustees sit-in on a daily multidisciplinary meeting to discuss each of the patients in the hospital, and conclude their day at the local family practice.

**Who leads the tours:** The CEO is deliberate about not being included during the program, but joins the group during meals and discussion. Instead, hospital physicians and leaders in various departments are identified to talk about their work.

**How are speakers prepared:** Speakers are not extensively "coached" before the Trustees visit. They are provided with a few potential questions that Trustees may ask, but are not scripted as to how they should answer. This is intentional, so that questions and answers are candid and transparent.

**What materials are provided in advance:** Each participating physician is able to provide materials for Trustees to review in advance. However, the purpose of this experience is to "see," making the data much less of a focus.

**What is the goal:** The goal is to provide hospital Trustees with a deeper understanding of hospital operations and both the challenges and successes of frontline patient care. With this knowledge, the Board stays focused on the strategic needs of the hospital and can make more informed decisions in their role in hospital governance and community engagement.

**What was an unexpected outcome:** The participating physicians truly stepped up and embraced the experience. Trustees were inspired by witnessing the passion that hospital employees have for the work that they do.

**Would you encourage other hospitals to consider something similar:** Yes, absolutely. It's easy. The program was actually suggested and insisted upon by the Board Chair, who attended a conference where she heard another hospital share about their experience with this type of program. Once she insisted on it, the hospital President worked with key staff members to make it a reality. The results were well-worth the small amount of planning and coordination.

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