

LDI RESIDENTIAL COURSE 2 AGENDA

DAY 0 Saturday November 6, 2010

BREAKFAST on your own

All day Arrivals at San Diego Airport; ground transportation to Hotel

Free Day for Participants, unless you want to participate in:

11:00 – 1:00 PM **Advanced Presentation Skills Feedback (Optional)** *Ron Cameron-Lewis*

- This is an opportunity for interested participants to meet with Ron Cameron-Lewis, Consultant (Presentational Skills). This workshop is planned as an interactive participatory experience that will come from the questions you bring to the workshop. Start by thinking, "How can I improve my abilities with..." Ron's task is to come up with advice and practical exercises to help you in the future.

Free Evening, **DINNER** on your own

DAY 1 Sunday, November 7, 2010 at San Diego Hospice

BREAKFAST on your own

9:30 AM **Bus to San Diego Hospice**, Meet at Courtyard by Marriott Main Lobby Entrance

10:00 – 12:00 PM **S01: Initiative Update, Course Objectives**, *Keck 1 & 2 Conference Rooms (Ferris & Moore)*

Small Group Assignments – *(Moore)*

12:00 PM **OPENING BANQUET LUNCHEON**

12:30 PM **WELCOME** *Keck 1 & 2 Conference Rooms (Ferris, Von Gunten, Pacurar)*

12:45 PM **S02: KEYNOTE SPEAKER Jerry Jellison, PhD, – Managing the Dynamics of Change**

2:00 – 4:00PM **S03: Participant IDP Leadership Highlights Presentation**

Participants will present – 6 month view (*one* highlight, 5 minute each, preloaded slides)

4:00 – 4:30 PM **Bus to Courtyard by Marriott**, from main entrance of San Diego Hospice

Free Evening, **DINNER** on your own

DAY 2 Monday, November 8, 2010 at Courtyard by Marriott

7:00 – 8:30 AM **BREAKFAST** in Synergy

8:30 -8:45 AM **Welcome, Administrivia**, *Frank D. Ferris, Shannon Moore*

8:45 – 10:00 AM **S04: Review of Myers-Briggs Type Indicator (MBTI)** (*Helen McNeal, Eileen Piersa*)

Participants will be able to

- Identify personal communication and decision-making style
- Development awareness of others' styles
- Awareness of the value and impact of different styles in group dynamics

10:00 – 10:30 AM **BREAK**

10:30 – 11:30 PM **S05: Education as a Tool for Planning and Teamwork**, *Helen McNeal*

Participants will be able to describe

- Principles of Adult Learning (Koeb)
- Adult Learning Styles
- Competence Ladder

11:30 – 12:30 PM **S06 Small Group Facilitation Skills**, *Frank D. Ferris*,

Participants will be able to describe

- state fundamentals of facilitating group discussion
- integration of group process (how to achieve engagement and buy-in)
- small group meeting management; content and process

12:30 – 1:30 PM **LUNCH**

1:30 – 2:30 PM S07 Strategic Planning *Frank Ferris, Liz Gwyther, Joe Harford*

Participants will be able to describe

- Overview and components of a strategic plan (*handout*)
- Approach to prepare and deliver a plan
- The Strategic Planning Exercise; 4 model Strategic Palliative Care Plans
- Ground rules for Exercise (hand out)
- Expected “deliverable” for Friday Presentation (Nov 12)

2:30 – 3:00 PM **BREAK**

3:00 – 6:00 PM **S08: Small Group Leadership Exercise** (*see Breakout Room List*)

Participants will be able to demonstrate how to

- use small group facilitation and leadership skills (ground rules)
- develop strategic, implementation and marketing plan for assigned tasks

Assignment: Strategic Plan; Develop Vision, Mission, and Values (complete worksheet)

Group 1 in Board Room-Strategic Planning: Developing and Marketing an Educational Program

Group 2 in Convene 4-Strategic Planning: Developing and Marketing a Palliative Care Unit and Consult Service

Group 3 in Convene 5-Strategic Planning: Developing and Marketing a Regional/National Palliative Care Association

Group 4 in Convene 3- Strategic Planning: Developing and Marketing a Developing and Marketing a Home Care Program

Free Evening, **DINNER** on your own

DAY 3 Tuesday November 9, 2010 at Courtyard by Marriott

7:00 – 8:30 AM **BREAKFAST** in Synergy

8:30 – 9:00 AM **S09: Presentation Skills – Voice Exercises and Practice** *Ron Cameron-Lewis*

Participants will

- Focus on using breath to relax and focus before presenting an important speech
- Practice exercises to connect with the lower half of one's vocal range and building strength through increased vocal resonance in different areas of the body.

9:00 – 10:15 AM **S10: Fundamentals of Project Management**, *Eileen Piersa, Shannon Moore*

Participants will be able to describe

- Highlights from 7 Habits
- Defining, Planning, Implementation, Evaluation (handout)
- Broad 'first steps' to organizing a project
- Time management

10:15 – 10:30 AM **BREAK**

10:30 – 12:00 PM **S11: Palliative Care Situation Analysis: Plan It, Do It, Use It** *Joe Harford*

Participants will be able to describe

- components of a situation analysis
- sources of country-specific information of relevance to a situation analysis
- possible uses of a situation analysis in forwarding the palliative care agenda

12:00 – 12:15 PM Preparation for afternoon Small Group Activities, *Shannon Moore*

12:15 – 1:30 PM **LUNCH S12: Mentor – Mentee IDP Update**

Participants will

- review, deepen and develop the IDP
- incorporate the strategic planning aspects not already included
- collaborate regionally

1:30 – 5:30 PM **S13: Small Group Facilitation / Leadership Skills Exercise** *LDI Team*

Participants will

- Practice project management and Strategic Planning skills
- Develop team dynamics to accomplish the task
- Recognize individual leadership and team communication skills

Assignment #1: Design and prepare to build a sandcastle (refer to instruction sheet)

Assignment #2: Strategic Plan; Situational Analysis, Identify Customers and Stakeholders, SWOT analysis (complete worksheet)

Group 1 in Board Room 1

Group 2 in Convene 4

Group 3 in Convene 5

Group 4 in Board Room 2

5:30 – End of day, Dinner on your own

DAY 4 Wednesday November 10, 2010 at Courtyard by Marriott

- 7:00 – 8:30 AM **BREAKFAST** in Synergy



8:30 – 9:00 AM **S15: Presentation Skills – Voice Exercises and Practice** *Ron Cameron-Lewis*
Participants will

- Focus on developing the power of vowels as a device to slow down rapid speech patterns, whether this is a life-long habit or something triggered by anxiety
- Practice the use of long and short vowel-sound patterns in English to help with accent modification.

9:00 – 10:30 AM **S16: Influencing /Persuasion**, *Eileen Piersa, Shannon Moore*

Participants will be able to describe

- Tell, Sell, Consult, Join – Leadership Communication Style Decisions
- The power of influencing/persuasion
- When to use, how to frame the message and choose powerful words that ‘work’
- Turning words into behavior change and action

10:30 – 11:00 AM **BREAK**

11:00 – 12:30 PM **S17: Financial Planning**, *Patrick Akhiwu, Judi McCarter, Shannon Moore*

Attendee will be able to:

- Describe budgeting terms and concepts
- Overview of new LDI Budget Spreadsheet (basics of embedded formulas)
- Create a budget template based on hypothetical project

12:30 – 1:30 PM **Pick up BOX LUNCH, Gather your personal things/supplies for beach activity**

1:30 – 2:00 PM **Bus to Catamaran Hotel and Beach**, Meet at Courtyard by Marriott Main Lobby Entrance

2:00 – 4:30 PM **S18: Sandcastle Building Exercise**

Participants will

- Practice leadership skills, facilitation skills, consensus and team-building (project implementation)
- Bring the project ‘vision’ to reality
- Celebrate success

4:30 – 5:00 PM **Sandcastle Appreciation/Evaluation**

5:00 – 5:30 PM **Debrief Leadership Lessons/Project Management** (*Helen McNeal, Eileen Piersa*)

5:30 – 7:30 PM **FIRE PIT BARBEQUE DINNER**

7:30 – 8:00 PM **Bus to Courtyard by Marriott, from Catamaran Hotel Entrance**

DAY 5 Thursday, November 11, 2010 at Courtyard by Marriott

7:00 – 8:30 AM **BREAKFAST** in Synergy

8:30 – 9:00 AM **S17: Presentation Skills – Voice Exercises and Practice** *Ron Cameron-Lewis*

Participants will

- Focus on increasing effective communication through clarity of articulation
- Practice exercises designed to expand the range of the human voice with increased color and range of expression.

9:00 – 11:00 AM **S18: Conflict Styles and Resolutions**, *David Cameron*

Participants will be able to describe

- Kraybill Conflict Styles Inventory- implications for work and personal life
- Language that promotes negotiation (win-win); using resolution to “influence”
- MBTI preferences and conflict styles

11:00 – 11:30 AM **BREAK**

11:30 – 12:30 **S19: Using Data to Strengthen Your Plan**, *Lori Montross, Lukas Radbruch*

Participants will be able to describe

- The fundamentals of powerful data gathering
- The value of qualitative and quantitative data in advocacy (creating a ‘story’)

12:30 – 2:00 PM **LUNCH, S20: ‘Leadership Stories’**, *Liliana De Lima, Daniela Mosoiu*

2:00 – 5:00 PM **S21: Small Group Leadership Exercise** (*see Breakout Room List*)

Participants will

- Integrate new aspects/components of Initiative Strategic Plan
- Develop team dynamics to accomplish the task
- Recognize individual leadership and team communication skills
- Prepare for model strategic plan presentation to large group Friday

Assignment #1: Strategic Plan; Set Examples of Goals and Objectives (develop action steps if able) (complete worksheet)

Assignment #2: Prepare for strategic plan presentation to large group Friday morning

Group 1 in Board Room 1

Group 2 in Convene 4

Group 3 in Convene 5

Group 4 in Board Room 2

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5:00 PM **REST BREAK**

6:00 – 7:00 PM **DINNER and LDI Video**

7:00 – 8:00 PM **S14: (Optional) Informal Discussion, Writing for Research**, *L. Radbruch, Joe Harford, Liz Gwyther*

Participants will learn

- preparation steps to successfully write for purposes of research
- resources for further information/direction

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DAY 6 Friday, November 12, 2010 at Courtyard by Marriott

7:00 – 8:30 AM **BREAKFAST** in Synergy

8:30 – 11:30 AM **S23: Presentations of Group Strategic Plans to Entire Group**
(*Model PC Strategic Planning Groups; 20 minutes per presentation, 10 minutes for questions / discussion*)

Participants will be able to

- Describe key elements in each group's assigned strategic plans
- Use the model strategic plans to create change in own contexts
- Describe and create vital questions to guide the development of strategic planning

12:00 – 1:30 PM **LUNCH, S24, Charles F. von Gunten, MD, PhD, FACP, FAAHPM**

1:30 – 3:00 PM **S25: Setting up Your "Personal Story" (Final Project)** *Frank Ferris, Lori Montross, Shannon Moore*

Participants will be able to

- begin the framework of their personal historical timeline and turning points (describe post-work tool)
- use the Pioneers in Palliative Care Series Guidelines developed by VJ Periyakoil

3:00 – 3:30 PM **BREAK**

3:30 – 4:30 PM **S26: Next Steps, Your Initiative Plan, or Personal Story, Etc.** *LDI Team*

Participants will be able to describe

- the Initiatives activities between now and the next course
- the resources available to support further development
- the Initiative's expectations of the participants and mentors

4:30 – 5:00 PM **Summary, Overall Course Evaluation**

5:00 – 6:30 PM **REST BREAK**

6:30 – 9:00 PM **CELEBRATORY DINNER**

DAY 7 Saturday, November 13, 2010 at Courtyard by Marriott

Participants depart / travel, or free day to enjoy San Diego

Strategic Planning Worksheet – Monday
Facilitator:

Goal of this part of the plan:

Who needs to be in the room for this step of the strategic planning process?

Vision:

Mission:

Values:

Strategic Planning Worksheet – Tuesday

Strategic Planning Worksheet – Wednesday

Strategic Planning Worksheet – Thursday