



THE INSTITUTE FOR PALLIATIVE MEDICINE

at San Diego Hospice

INTERNATIONAL PALLIATIVE CARE LEADERSHIP DEVELOPMENT INITIATIVE

An Initiative of the Institute for Palliative Medicine at San Diego Hospice

Funded by a Grant from the International Palliative Care Initiative,

Open Society Institute, New York

with Additional Support Provided by the National Cancer Institute, Bethesda, Maryland, and

The Diana, Princess of Wales Memorial Fund, London, UK

Mentor Guidelines

Overview

The Institute of Palliative Medicine at San Diego Hospice is leading the International Palliative Care Leadership Development Initiative, (LDI) a challenging and innovative project that will advance palliative care globally. Your contribution as one of the Regional Mentor is a cornerstone of our efforts to foster leadership skills in these carefully selected palliative care physician leaders. Through the mentoring relationship, you will provide the impetus that will facilitate advancing leadership skills, activities, and understanding. We expect the LDI will be a watershed program to advance strategic development of palliative care leadership, and palliative care, regionally and globally.

Mentor Opportunities

During this structured 2-year Initiative, you will have a unique opportunity to:

- Influence, teach, create, and coach in a precedent-setting international initiative
- Share and learn effective approaches to listening, presentation, facilitation, mentorship, feedback, media skills etc.
- Further develop and strengthen your mentoring skills and activities.
- Network with the other regional mentors, the physicians, and the LDI team
- Receive personal feedback from participants, other mentors, and the Initiative team
- Receive full attribution for contribution to the International Palliative Care Leadership Development Initiative
- Be appointed as Associate Faculty of the Institute for Palliative Medicine

Mentor Role

You were invited to the role of Regional Mentor because of your demonstrated leadership in Palliative Medicine on regional, national and international levels. You will be asked to “walk-with” selected participants (aka mentees) from a geographic region and work to accelerate their leadership development and growth.

As a Mentor you will:

- Review the pre-assessment information submitted by your mentees
- Serve as one of the primary links between participants and the Initiative team
- Facilitate and guide individual and group interactive sessions during the courses
- Collaborate with each mentee to help her/him develop an *Individual Development Plan* (IDP)
- Be available to mentees as negotiated or needed, between quarterly reviews
- Participate in quarterly ‘check-in’ phone calls (SKYPE, phone, etc) to foster development, review and revision of mentee’s IDP throughout the initiative to help them reach their identified goals.
- Help mentees prepare for, and write annual reports and their end-of-initiative personal story (Final Project)

A mentor-mentee relationship is enhanced when both the mentor and mentee learn from each other, building on trust and commitment all the while respecting the cultural differences, preferences and past experiences. It is our hope that you will gain from the interactions as much as the participants will, both by the engagement itself and the feedback offered over the course of the Initiative.

As a leader and faculty member, we will also be asking you to:

- Contribute to the planning development and evaluation of the Initiative’s curriculum by providing references, supporting resources, help develop content, suggest local/regional mentors, etc.
- Present content at one or more courses (within your areas of personal expertise)

Advance Preparation

In December 2010, all the participants will be asked to complete an on-line Myers-Briggs Type Indicator (MBTI), the Leadership Practices Inventory (LPI) that will serve as the baseline for leadership practice and a Skills and Situation Analysis. We ask that you also take these quick but powerful on-line assessment tools yourself to become familiar with the content, capture your experience as a leader and increase your own self-awareness. The regional participant’s results will be shared with you, along with an analysis of their current skills and the situation in their country. We are asking that you review this information prior to the January 2010 course so you will have a ‘jump-start’ toward relationship-building and effective leadership skills guidance. A CV, a biosketch and a photo will also be forwarded to help with your preparation in advance of the first meeting in January.

To build an open and authentic relationship, mentors and the emerging leaders from different cultural backgrounds may need to be able to discuss these differences and their impact on perceptions, behaviors and decisions. Sharing MBTI 'results' and fostering frequent feedback has been shown to be grounding and empowering for participants who are coming from different perspectives at baseline.

Two books, John C. Maxwell's *Developing the Leader within You* and *The Leadership Challenge*, by Kouzes and Posner will be sent to you. This foundational reading will serve as the beginning framework for the LDI, and is required reading for the LDI team as well as the participants.

In addition, we will be building upon and weaving the strategy defined in the *Public Health Strategy for Palliative Care*. This, as well as other key articles from the leadership literature will be made available on the IPM website.

Residential Courses

You have committed to attend all three annual week-long courses. The first course will be in January 2010 in San Diego, California.

Arrive by	Mid-day Jan 23, 2010 (Saturday)
Preparatory Meeting: Mentors, Funders, Leadership Team	Jan 23, 2010 at 16:00-20:00
Welcome/Orientation	Jan 24, 2010
Course	Jan 25 – 29, 2010
Debriefing / Planning Next Steps Meeting: Mentors, Funders, Leadership Team	Jan 30, 2010 (Saturday)
Departure	Jan 31, 2010 (Sunday)

The locations and exact timing of Course #2 and #3 are not yet determined. Please save the first 3 weeks of November 2010 and 2011 on your calendar. As soon as these date and location details are known, we will immediately notify you. Curricular details and design of the courses will follow.

Each day during the first course you will meet with your assigned mentees to incorporate as possible, the didactic information presented. We are aiming to have one mentor be responsible for no more than 4 mentees, so that the small group and individual interactions may be focused and productive. A regional approach to challenges of palliative care will also be invited, expecting there may be powerful intersections of programmatic ideas and activities.

As described in the LDI Participant Guidelines (attached), collaboration to develop the participant IDP is one of the main ways you will contribute. We hope the IDP will be a dynamic and 'live' document, one that serves to be the basis of their leadership trajectory during the 2 years of the Initiative, and beyond.

Faculty Presentations at Courses

Because you are a recognized leader in Palliative Care and an integral part of the LDI, we will likely ask you to make a presentation at one or another of the residential courses. We want to honor and model for the participants what we know about adult learning. Each session will be designed to be as interactive as possible, and will be less than one hour. Teaching time may be extended longer when it is expected that audience engagement will be such that more time would be fruitful. When you agree to teach from your areas of personal expertise, integrating your particular professional life experiences into the leadership construct, we all will be enriched and informed. Though we would love to offer an additional honorarium for your gift to us, at this time funding imitations will not allow it. Your contribution will be fully attributed in the International Palliative Care Leadership Development Initiative, and become a part of the maturing foundational curriculum.

A 'Presentation Template' will be sent to outline your topic content, the objectives, and the presentation style. When you have a chance to complete that, we are asking that this be sent back to us one month prior to the commencement date of the conference to be sure that we have time to weave all the presentations into a flowing 'whole'. PowerPoint slide presentations (with references) need to be completed and sent to us 2 weeks in advance of the first conference day so that they can be copied and bound in the participant's syllabus.

Evolving Activities

All of us are expecting to learn so much during this Initiative. We are going to take advantage of this opportunity to explore the concept of mentoring and the strategies for mentoring success. A relationship between a mentor and mentee may be absolutely foundational in a professional career pathway, and there are discrete skills associated with expert mentorship. We would suggest that you develop your own IDP; one which emphasizes behaviors, skills and understanding associated with coaching and mentoring. There will be room for the mentor group to collaborate and enrich each other as well as the participants with whom you engage. One of the less overt educational objectives for the participants is to learn from you what it means to be an expert mentor. What do they need to learn in this regard? How can we model 'best practice', the fine communication skills and the 'companioning' that characterizes mentorship at its best? As this is a pilot project, all of the components will be in evolution. Please feel free to contribute in any way to this vital cornerstone of leadership development.

LDI Activity Timelines

DATE	JAN 2010			APR 2010			JUL 2010			OCT 2010	NOV 2010	DEC 2010	JAN 2011			APR 2011			JUL 2011			OCT 2011	NOV 2011	DEC 2011
Residential Courses																								
Quarterly 'Check-In' Phone Calls & Reports																								
Quarterly Mentor Calls																								
Annual Reports																								
Final Project																								

Quarterly 'Check-In' Phone Calls with Participants

Between the three 5-day residential conferences, your mentoring role will continue via the quarterly 'check-in' phone calls with each of your mentees. A template may be used to guide discussion points and planning. This on-line 'report' will be filled out by the mentee and with the recording of the conference call, be added to the mentee's private file within the IPM LearnCenter.com. Gathering this information will facilitate the annual reports as well as the Final Project (refer to the Participant Guidelines attached).

Quarterly Mentor Calls

Each quarter, the leadership team will also host 'check-in' calls with the Regional Mentors to see how you are doing personally, and to provide additional mentorship skill building opportunities.

Additional Opportunities

Regional mentors may be asked by a participant to travel to the participant's place of work (whether you are mentoring that participant, or not). If invited and the request is reasonable, the mentor would be asked to make this trip, with all expenses (excluding the mentor's time) being covered by the participant's developmental stipend.

Mentors may also invite participants to visit mentor's place of work (if appropriate) and related travel expenses could be covered by the participant's developmental stipend.

Ongoing Evaluation

One of the most important components of any pilot project is the evaluation and feedback that strengthens and consolidates the vision and goals. To this end, there will be frequent opportunities to provide feedback. We will rely on you to honestly express your experience of the course overall, of the content, the delivery, the other faculty and mentors as well as your mentees. Because any leadership activity requires self-knowledge and insight, we will also ask you to evaluate yourself as mentor over the course of the Initiative. Your feedback will be very important.

Institutional Review Board and Consent

The Institutional Review Boards in the United States are formally designated to approve, monitor and review any research involving humans in order to protect them. As this Initiative is a pilot project, and designed to gather data for research and development, we will complete our standard IPM IRB review and approval process. Once approved, we will ask you to sign a consent form that will grant us permission to use your evaluation, feedback and all qualitative and quantitative data. Using the full array of data will facilitate on-going improvement of the LDI for all participants, mentors and faculty.

Financial Support

Honorarium

The Memorandum of Agreement (attached) explains the honorarium and the dates the money will be wired to your bank account. We will send you a form to collect the necessary information so that wiring money to you is safe and efficient. Please remember to sign and keep a copy of the Memorandum of Agreement for your records.

Residential Courses

Travel: in addition to your honorarium, the LDI will pay for your airfare and ground transportation expenses to each course location. For each course, you should plan on staying a minimum of 7 days. Because of the time needed for adjustment to time zone changes, we are encouraging you to consider coming in advance of the course. Once we get a

signed Memorandum of Agreement from you, we will be able to begin to make travel arrangements for you. DO NOT purchase any tickets yourself without written permission from the LDI Team. Unfortunately, we cannot provide financial support for required visas, incidental travel expenses, or additional days you may wish to stay in advance of, or after, the days of the course.

Accommodation and meals: Your accommodation and meals during the 7-day course will be covered. Most of the meals will be provided from the award-winning hotel services, with the company of other LDI participants. The address of the hotel and contact numbers for the January 2010 course are:

Courtyard Marriott San Diego Mission Valley/Hotel Circle

595 Hotel Circle South
San Diego, California 92108 USA
Phone: +1.619.291.5720
Fax: +1.619.297.7362
www.courtyardsd.com

Should any family member travel with you, you will be responsible for their expenses. They may share your room, but payment for any meals or additional room charges that accrue because they are present will be your responsibility.

Health/Travel Insurance

As healthcare is very expensive in the United States and many other countries, you will be expected to provide evidence of adequate health insurance coverage for your time in the United States. We also advise that you ensure you have adequate coverage for any other travel you plan to do as part of the LDI. We recommend that you investigate and purchase a policy from one of the many insurance companies in the US or Europe that have policies for visitors. One policy that we have found to be relatively comprehensive and inexpensive can be found at www.globaltravelinsurance.com/ihitravel.htm. This policy provides single and multi-trip health and travel insurance plans while you are outside your country of residence for up to a year, no matter how many trips are taken. Be sure to consider insurance options for health, dental, emergencies, evacuations, and repatriation of your remains should your die.

Travel insurance offers coverage for such things as trip cancellation or delay due to unforeseen events, for stolen or lost baggage and response to a medical emergency. These days, travel can get complicated and somewhat unpredictable. Please consider getting travel insurance to protect yourself as you travel. There are many plans available on line to choose from.

Overview of The Institute for Palliative Medicine

The LDI builds on the foundational work that the International Palliative Care Initiative at the Open Society Institute (IPCI) has done around the world to increase the capacity of palliative care. With a grant from OSI, and additional support from the Office of International Affairs, National Cancer Institute (OIA, NCI) and from The Diana, Princess of Wales Memorial Fund (DPWMF), The Institute for Palliative Medicine in San Diego has undertaken to lead the Leadership Development Initiative in partnership with OSI, OIA, NCI and DPWMF. (Please refer to the attached Overview of The Institute for Palliative Medicine that describes our vision, mission and programs).

As a Regional Mentor in the LDI, you become part of the growing faculty of IPM. You will have the opportunity to use the IPM name and logo, as well as the LDI logo. It is our expectation that you will cite or credit the LDI in any related work, using a citation statement like the one below:

“An Initiative of the Institute for Palliative Medicine at San Diego Hospice

Funded by a Grant from the International Palliative Care Initiative, Open Society Institute, New York, with Additional Support Provided by the National Cancer Institute, Bethesda, Maryland and Diana, Princess of Wales Memorial Fund, London, UK”

Confidentiality and Privacy Concerns

We will be very respectful of your confidentiality and privacy concerns, and know you will honor the same for your colleagues who are participating in the LDI. We have a private website for LDI participants, mentors and the team, (LearnCenter.com) and content here must not be shared with others. The moderated listserv also will be a place for confidential discussions, not to be shared with others unless the person involved has been granted express permission. You will have a private password-protected file to archive your journaling, reflections and insights as you travel the Leadership pathway. The recorded quarterly phone call files will be kept here also, so the material to help you write your final project is readily accessible. The LDI team may review and add to the material inside, but this file will be kept private from all others. A Users Guide for the LearnCenter.com will be provided to you and will delineate important features and access.

The **International Palliative Care Resource Center** web-portal (IPCRC.net) is a new innovation of the IPM. It serves as a ‘one-stop’ resource center for international palliative care providers, with the hope that the links and information shared will build palliative care capacity worldwide, and provide a dynamic and constantly expanding website. It is a public website, and is open to everyone. Here you will find access to an extensive array of palliative care resources including comfort, supportive, hospice, end-of-life, terminal and bereavement care, with a layout based on the **Square of Care** from the Canadian *Model to Guide Hospice Palliative Care*, and the World Health Organization (WHO) Public Health

Strategy for developing palliative care capacity. Please send in any links for regional or national resource information that you know about, (events, meetings, organizations, etc) as well as foundational content to widen the value of this web-portal. Send your suggestions to newresources@IPCRC.net. Eventually, as the LDI curricular materials are ready for public access, they will be placed here.

Copyright/Attribution

As you can see, we are expecting a rich interchange of experience, education, and contribution to the LDI community and in the material of the course itself. As a formal participant in the LDI, and particularly while the pilot project is in development, any contribution you make will be fully acknowledged with appreciation. IPM will own the copyright for all the materials produced through this Initiative, though once ready for public consumption, open access will be provided through IPCRC.net.