Physicians are in many ways, uniquely equipped to lead healthcare’s transformation. Leadership, as a skill, though, is distinct from clinical excellence – a skill that needs to be developed, and practiced.

It also requires an appreciation of the unique challenges facing physician leaders, how they learn, and how to engage them in the important, and rewarding, work of growing as leaders. This work enhances career success and satisfaction. It also allows physicians to support the success of their group and their colleagues, and to improve the quality of care they deliver.

Oregon Medical Group – Preparing for the Future, Today…

- Oregon Medical Group (“OMG”) is one of the Northwest’s largest independent, multi-specialty physician groups with over 700 employees, and 150 physicians and providers. It is an important resource for a large portion of the region. The group has developed a reputation for an approach that positions it well for value-based care and population health.
A New Type of Physician Leader

This work puts a strain on the organization. Leadership is asking a great deal of its people, especially its physician leaders. OMG prides itself on being physician-led. Karen Weiner, M.D., MMM, CPE, is the CEO. She previously practiced with the group as a pediatrician and then served as CMO.

She was succeeded in the CMO role by Stacy Chance, M.D., a pediatrician and internal medicine specialist. Other physicians serve as Practice Leads, Medical Directors, Department Chairs and Board Members.

Drs. Weiner and Chance realized that OMG’s future would require a new generation of physician leaders – with skills that go beyond running a department meeting or overseeing the implementation of a quality program.

OMG Considered Traditional Training Options . . .

1. **Institutional Programs**: These can include a Masters of Medical Management program, or academic executive leadership programs. Dr. Weiner is a graduate of the MMM program at USC and found it to be a valuable foundation for her role as a leader.

2. **Onsite Leadership Programs**: These often involve bringing speakers in to do training on a variety of topics as part of a defined, standardized curriculum.

3. **Topical Live or Online Training**: There are almost endless options for live workshops, or online training courses.

These approaches have limitations.

- **Return on the Investment**: Physicians often struggle to deploy their new knowledge because they’ve not improved leadership “skills” – including communication and relationship-building.

- **Cost**: Bringing a training firm onsite is expensive. Institutional programs are a significant investment.

- **Not focused on YOUR organizational challenges**: Training is most effective when the learning, itself, is focused on your specific challenges. Otherwise, the new knowledge and skills may not be immediately valuable to the organization.

- **Time Commitment**: These programs take physicians from their daily work for large blocks of time. Whether it’s spending time in online classes or full day workshops, it’s expensive for the group, and for the physician who is away from her practice.

- **A Lack of “Team-Learning”**: OMG wanted participants to learn to function as a “team” of leaders.
A Customized Program

J3P Healthcare Solutions collaborated with Drs. Weiner and Chance to design, build, and deploy a twelve-month program customized to OMG’s unique challenges and goals.

Twenty-four physician leaders, and the head of the Advanced Practice Provider program joined the first cohort. They participated in individual and group coaching, interactive live and virtual workshops, and completed pre, and post, session work.

The program is built on four key principles:

- **Focus on the Individual**: While the program is designed to support OMG’s success, it is built on the premise that each participant needs to grow and succeed, as an individual, first.

- **Create a Sense of Ownership**: Participants see it as THEIR program. They drive the content and engage in the work because it supports their own success, and the success of the group, and their colleagues.

- **Focus on SKILLS**: Leadership is more about skills than knowledge. Participants are challenged to be open, humble, vulnerable and willing to do the work. They must understand themselves and embrace “practicing” leadership as a skill.

- **Integrate Learning into the Work**: The learning is built around, and focused on, challenges and operational issues facing the group. As an example, a session on “Leading Change” examines change management theory, and then the principles are applied to OMG’s change initiatives, including work to implement a new EHR system.

**People - Strategy - Performance**

- Establish, and stay focused on, the group’s vision
- Identify and understand the barriers to realizing that vision
- Focus on supporting individual, and team, success
- Deploy a mix of strategic, operational, team, leadership, and communication training and tools
Step 1: Engage Physicians in Understanding the Challenges, and Their Own Needs

- To create a sense of ownership the program begins by challenging physicians to identify, explore, and understand the challenges facing the group.
- Leaders begin to understand the bigger picture, and different perspectives and approaches.
- Physicians explores what it means to be a leader and where they struggle, individually and as a group. It is an important, frank, and open discussion.
- Participants self-rate their leadership skills with a customized survey.
- This work drives the program content. The group identified a number of key challenges:
  - Growth creates complexity, especially the addition of multiple specialties to what was, originally, a primary care-focused organization
  - A complicated and competitive market
  - Retaining OMG’s distinct culture and keeping people connected to the “why”
  - New care delivery models, with an emphasis on quality and population health, mean physicians need to adapt to constant measurement of their performance.
  - Standardization is threatening for some as challenges their sense of professional autonomy
  - Physician leaders may not understand what’s expected of them in their respective roles.
  - Ideally, every OMG physician should have a sense of accountability for group success.

"We had a general vision of what we were hoping to accomplish. We knew the group’s challenges were new, and evolving, so we wanted an approach that aligned with those challenges. Most importantly we wanted it to start with a focus on the individual, while simultaneously creating a sense of team. What we found helpful, was J3P’s willingness to collaborate on the program design, and the flexibility to change direction, approach, and focus, based on our needs."

Stacy Chance, M.D.,
Chief Medical Officer
Case Study - Physician Leadership

Step 2: Self-Awareness as the Foundation

- Participants completed the online *J3P Physician Success Assessment*, which explores personality tendencies and motivational attributes. This is NOT a simple, personality assessment similar to the MBTI. It is a validated used to improve executive level performance. It has been tailored for physicians through extensive research.
- The results are reviewed in confidential, one-on-one sessions with specialized physician coaches, where they explore how the results can impact performance. Those who’ve not worked with an executive coach, are often skeptical of this process. There is, however, an almost universal realization that this data is invaluable to personal growth as a leader.
- Participants are able bring to the group work, their own personal, enhanced self-awareness. This work prompts productive, open, dialogue about improving communication and how to support their colleagues.

Step 3: Team Learning Sessions

- Based on OMG’s challenges, a curriculum was built covering the following topics:
  - The Psychology of Teams
  - What Does it Mean to Lead?
  - Psychological Safety
  - Making Culture Real
  - Communication and Influencing Skills
  - Providing and Receiving Feedback
  - Change Management
  - Conflict Resolution
  - Running Effective Meetings
  - Leadership Styles

- Sessions include small and large group discussion, and interactive exercises.
- Concepts are applied to real operational challenges.
- Sessions emphasize “team-learning”. Participants deploy new skills as they collaborate with each other. They analyze and solve problems, while improving the ability to communicate and to disagree, productively.

“ The approach of combining individual and group coaching, with team learning built around our specific strategic and operational challenges, keeps physicians engaged. They realize, quickly that this was THEIR program, and they embraced it.”

Stacy Chance, M.D.,
Chief Medical Officer
Step 4: Getting the Most Out of a 360 Degree Assessment

- A 360-degree behavioral assessment can be a powerful tool, if it’s deployed as part of a larger, deliberate plan. Without this forethought, it can cause consternation, angst, and actually, stifle growth.

- In this case it is deployed AFTER participants understand their own personality tendencies, motivational attributes, developmental goals, and the power of communication and relationships.

- Participants are open to the 360 data, learn from it, and explore ways to change. The aggregated, group, data provides insight into the group’s collective tendencies and how they impact colleagues and staff.

Step 5: Sustainment Plan and Work with the Board

- At the end of the program, participants are provided with a framework to identify areas for continued growth – taking ownership over their own development as leaders. The Executive Director of People and Culture was then engaged to co-create a plan for continued work on specific topics.

- The organization, and physicians, take ownership over the process of growth as leaders. This includes identifying participants for the next cohort.

- Many of the participants sit on the OMG Board of Directors. Physician leaders took their new skills to their work on the Board. This drove a new approach to strategic planning, Board dynamics, and committee structures, and the role of physicians as Board members.
Results - The program had a substantial impact in several key areas.

Functioning as a Team

There was a 52% improvement in the number of participants who believe that “physician leader colleagues function effectively as a team when confronting a challenging management or leadership issue.”

Individual Performance

- Over 90% of participants report substantial improvement in the areas of:
  - Leading Change; Influencing Skills; Conflict Management; and Giving Feedback.

- Over 80% report substantial improvement in:
  - Voicing Dissent in a Productive Manner; Building Effective Relationships, and
  - Thinking More Holistically about the Organization.

Group Performance

There has been near unanimous feedback that this work made it possible for the group to better navigate the crisis of the COVID-19 Pandemic.

While the Pandemic was all-consuming, the Group continued to make progress on key operational initiatives. They came out of this period in a position to not only survive, but to thrive and expand their market position.

“We could never have anticipated needing these skills to respond to a Pandemic, but the work ended up being an amazing resource for our physician leaders. They stepped up in ways I’d never imagined possible. We could see them applying their new skills, every day, to support their colleagues and the staff.”

Karen Weiner, M.D., MMM, CPE
Chief Executive Officer
Physician Leader Feedback

What it Means to Lead

I have a new perspective on what leadership is. It’s about relationships, communication and facilitation.

I now appreciate that not only is vulnerability O.K – but it’s critically important!

The Value of Communication and Relationships

Sharing this journey with the group and hearing different perspectives has been invaluable.

I’ve learned the importance of clarity, and precise communication and messaging.

My Department runs better because I’m making a special effort to build relationships and let people know they are valued.

The Most Valuable Lessons Learned

I’m better able to manage emotions and regulate responses, approach people and discussions with openness and curiosity - rather than defensiveness.

Developing influence is the cornerstone of my ability to support my colleagues.

To think broadly and listen to the perspective of colleagues and staff - and encourage them to offer solutions.

Developing closer working relationships with colleagues and administrators has made a huge difference in moving forward as a team.

Going through this together has greatly improved relationships, communication, and team accountability.
Physicians in these programs come to realize that leadership skills are more important than knowledge, and that these skills require practice. They do not come naturally or easily to most people. Physicians learn, early in their careers, to establish productive relationships with patients. Similarly, they must learn how to develop effective relationships, as leaders.

Physicians realize the value of connectedness. They are reminded of their common goals and values. They realize that the best way to achieve these goals, and to respect these values, is to lead from a place of humility, openness and connectedness.

They learn that disagreement is not conflict, and that there is power in the sense of team. The success of the group, and the impact on staff and patients, makes the work meaningful.

Physician leadership programs need to start from this basic premise, and then create a structure for individual and group growth, built around the concept of People – Strategy-Performance.

“When we started down this path, we knew the work was important. What we didn’t realize is how transformational it was going to be for each of us as individuals, and for the group.

Our initial goal was to help physician leaders to be more effective. What the work has really done, is help us to redefine what it means to be a physician leader, and the sense that our job as leaders is to work as a team to help the entire organization navigate some really complex challenges - and still find joy in the work.”

Karen Weiner, M.D., MMM, CPE
Chief Executive Officer
Oregon Medical Group