| MODULE TITLE: | MANAGEMENT & LEADERSHIP | 01-Jan-2009 |
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| DEVELOPED BY: | Wendy Crebbin | |

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| **Module Rationale and Objectives** | Management, leadership and team co-ordination represent a vital role in error management in the operating theatre, and can have a significant impact on clinical team performance and consequently, on patient safety. This module draws attention to many of the essential management issues a clinician is likely to meet as a manager. <br><br> At graduation the trainee will be able to: <br> ▪ allocate finite healthcare resources appropriately to practice decisions <br> ▪ manage and lead clinical teams <br> ▪ manage their practice and career effectively <br> ▪ serve in administration and leadership roles, as appropriate |
| **Suggested Reading** | There are no prescribed texts; trainees will be expected to keep abreast with current literature. Suggested reading: <br><br> Australian Council for Safety and Quality in Health Care, 2005, 'Managing Risk', National Patient Safety Education Framework, pp. 55-62: refer to requirements for Level 3 http://www.safetyandquality.org/framework0705.pdf <br><br> Flin R. and Yule, S. 2004, 'Leadership for safety: industrial experience', Quality Safety Health Care, v. 13, pp.45-51: http://www.abdn.ac.uk/iprc/papers%20reports/Leadership_4_safety_ind_experience.pdf <br><br> Flin R. and Yule, S., 2005, 'Advances in patient safety: non-technical skills in surgery' Surgeons' News, v.4, i.3: http://www.abdn.ac.uk/~psy296/dept/surgeonsnews%20N20July05.pdfOTSS% <br><br> Plesk P. and Wilson, T. 2001, 'Complexity, leadership, and management in healthcare organisations', British Medical Journal, v.323 (7315), pp.746-749: http://bmj.bmjjournals.com/cgi/content/full/323/7315/746 |
| **Learning Opportunities and Methods** | ▪ Online <br> ▪ Literature review |
| **How this unit will be assessed** | ▪ Half yearly Supervisor's reports <br> ▪ Examination |

| MODULE OBJECTIVES | |
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| **Allocate finite healthcare resources appropriately to practice decisions** | Effectively use resources to balance patient care and systemic demands:<br>▪ identify the availability of healthcare resources<br>▪ constantly seek ways to maximise healthcare resources for patients<br>▪ identify methods that enhance patient care without increasing overall healthcare costs<br><br>Identify and differentiate between systemic demands and patient needs:<br>▪ customise care according to patients' needs and values, anticipating, rather than reacting to, patient's needs<br>▪ provide care that is respectful of and responsible to individual patient preferences, needs and values<br>▪ ensure patient values guide all clinical decisions<br>▪ show patience and empathy in giving bad news to a patient and/or their family<br>▪ balance the interest of patients with hospital needs without sacrificing patient trust or care<br>▪ view patient as the source of control, as opposed to traditional approach of professionals as the source of control<br>▪ identify methods that provide access to basic healthcare for all people<br>▪ prioritise patient list for ward rounds on an on-going basis<br><br>Apply a wide range of information to prioritise needs and demands:<br>▪ ensure all procedures are followed, such as, obtaining consent and ordering of tests<br>▪ review patient records before dispensing treatment<br>▪ immediately record treatment plans and medications to ensure all member of the team understand what is required<br>▪ consult with other professionals to ensure the most appropriate patient care |
| **Manage and lead clinical teams** | Is respectful of the different kinds of knowledge and expertise which contribute to the effective functioning of a clinical team:<br>▪ co-ordinate treatment plans with other doctors and health professionals, including where appropriate, with other units<br>▪ involve subordinates and provide opportunities for them to participate in decision-making<br>▪ share information and agree on treatment plans with allied health staff<br>▪ show consideration for the needs of team members<br>▪ ensure team members have a shared picture of the situation and can complete tasks effectively<br><br>Communicate with and co-ordinate surgical teams to achieve an optimal surgical environment:<br>▪ develop active listening techniques to enhance understanding and show empathy<br>▪ give and receive appropriate feedback<br>▪ establish effective communication techniques to deal with difficult situations<br>▪ identify barriers to effective communication<br>▪ manage performance of individuals in teams<br>▪ address issues and problems of individuals in teams<br>▪ respond to performance related issues quickly and in confidence<br>▪ use negotiating skills in dealing with other departments, hospitals, patients, and family members |

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| **Manage and lead clinical teams** | Recognise and demonstrate the different leadership styles which are appropriate for each different setting, e.g. theatre, ICU:<br>▪ accept the requirements of different roles and responsibilities within different settings<br>▪ build respect, support and commitment within the work team<br>▪ develop and maintain personal competence |
| **Manage their practice and career effectively** | Use time management skills appropriately:<br>▪ assess the financial health of your practice<br>▪ promote efficiency by understanding basic accounting<br>▪ manage personal work goals<br>▪ set and meet your own work/life priorities<br>▪ recognise the effect of poor organisation and its relationship to stress<br>▪ identify and control major time-wasters<br>▪ analyse your time utilisation<br>▪ set up and use a personalised time management system<br>▪ reduce patient waiting time and the sometimes harmful delays for both those who receive and those who give care<br><br>Maintain accurate and up-to-date patient records:<br>▪ use electronic health care systems<br>▪ maintain currency with medical confidentiality laws<br>▪ maintain patient confidentiality<br>▪ create or update patient record as soon as the episode of care is completed/ ensure patient record is completed in a timely manner<br>▪ establish that the correct spelling of names is used, particularly for unusual names<br>▪ minimise errors, and maintain data quality and integrity<br>▪ assess patient treatment plans and test results<br>▪ establish contingency management skills to deal with patient treatment plans not proceeding as planned<br>▪ address information gaps in patient historical records |
| **Serve in administration and leadership roles, as appropriate** | Plan relevant elements of health care delivery:<br>▪ plan healthcare delivery consistent with government regulations and hospital policy<br>▪ plan healthcare delivery within budgetary constraints<br>▪ create effective work schedules<br>▪ recognise and reward team members<br>▪ identify and deal with any discrimination, sexual harassment or bullying in the workplace<br>▪ be familiar with employer and manager liabilities and responsibilities<br>▪ work to minimise organisational risk<br>▪ remain current with internal and external grievance resolution procedures<br>▪ acknowledge the obligation of medial practitioners under various statutory bodies<br>▪ recognise the requirements of medical practitioners in relation to court procedures, giving evidence and medico-legal examinations<br>▪ minimise medico-legal risk<br>▪ harness the natural creativity and organising ability of clinical staff and stakeholders |

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| | ▪ establish a constructive approach to variation in areas of practice where there is only moderate certainty and agreement<br>▪ establish high standards of clinical practice and care<br>▪ provide direction to others when necessary<br>▪ organise the resources, personnel and activities required to achieve goals<br>▪ recognise the importance of participative, transformational leadership styles for safety performance<br><br>Chair or participate effectively in committees, meetings:<br>▪ shape/set clear and relevant meeting agenda<br>▪ participate actively<br>▪ make positive and constructive contributions<br>▪ ask relevant questions when appropriate<br>▪ advance the core goals of the committee<br>▪ develop /enhance skills in lateral, as well as analytical thinking<br>▪ develop succession planning skills |

**SELF ASSESSMENT**

**Allocating resources:**

Identify and prioritise the patient and resource issues that need be taken into consideration in making a choice about who should be given priority for an expensive operation and/or therapeutic treatment when:

- One patient is teenager and the other is middle aged
- One patient is a smoker and the other is obese
- One patient is male and the other is female
- One patient has had previous delays in their treatment and their health is deteriorating and the other is in better health and more likely to benefit

Identify a situation in your own experience where a choice needed to be made and re-assess the factors that impinged on that decision

**Managing and leading teams:**

Identify the management and leadership issues in the following scenario.

To be added

**Managing practice and career:**

- List your own work priorities and goals
- Identify any elements of your current work practices that may be hindering you in achieving those priorities and goals
- Evaluate the way that you respond to those hindering elements

**Administrative and leadership roles:**

Explain the administrative issues in the following scenario and describe the positive/creative ways in which those issues can be managed.

To be added