

Written by Ryan Quinn as a supplement for using *Lift: Becoming a Positive Force in Any Situation* (San Francisco: Berrett-Koehler, 2009) to teach Children's Hospital and Clinics (A) (HBS 9-302-050) by Amy Edmondson, Michael A. Roberto, and Anita Tucker.

Teaching Note Addendum

USING CHILDREN'S HOSPITAL AND CLINICS TO TEACH *LIFT*

Synopsis

The *Children's Hospital and Clinics* case (HBS 9-302-050) was originally developed for use in a general management course focusing on implementation, and has also been used in classes on leadership, organizational learning, leading change, managing service operations, and health care management. This teaching addendum helps instructors to use the case to teach a module on positive influence in classes on leadership, change management, and power and politics. When used for this purpose, students will read the first chapter of *Lift: Becoming a Positive Force in Any Situation* (Ryan W. Quinn & Robert E. Quinn, 2009, Berrett-Koehler, San Francisco) to help them prepare for the case discussion.

This addendum is not meant to replace the Harvard teaching note (HBS 5-303-071) that accompanies the *Children's Hospital and Clinics* case. Instructors should still read that teaching note when preparing to teach this class. This addendum is only designed to address changes in the teaching plan that adapt the case discussion to teaching *Lift* in one of the three classes mentioned above.

The first chapter of *Lift* introduces students to the idea that if we are concerned with being a positive influence, and not just with exerting influence, then we need to be concerned about our momentary experience of who we are in a situation—our psychological state. This chapter proposes that they can experience a psychological state—characterized by being purpose-centered, internally-directed, other-focused, and externally open—which will enable them to be a positive influence in any situation. It also introduces them to four questions that they can use to help them become purpose-centered, internally-directed, other-focused, and externally-open.

This class is designed to be the first class in a six-class module on the book, *Lift*, but instructors can also use it as a standalone class as well. For teaching notes on the entire *Lift* module, please go to <http://www.leadingwithlift.com/teaching/coursemodules>.

The remainder of this addendum focuses on how *Children's Hospital and Clinics* can be used with *Lift* in each type of course: leadership, change management, and power and politics.

Reading Assignment

The reading assignment for this class is:

1. Children's Hospital and Clinics (A) (HBS 9-302-050)
2. "Lift: A Positive Influence and a Psychological State" – chapter one from Quinn, R. W. & Quinn, R. E. (2009). *Lift: Becoming a Positive Force in Any Situation*. San Francisco: Berrett-Koehler.
3. Students may also read chapter two, "The Science, History, and Metaphor of Lift" as supplemental reading if they are interested.

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LEADERSHIP

Objectives

1. To introduce students to the central concepts and four questions of *Lift*.
2. To help students see how using the four questions can improve their leadership ability.

Assignment Questions

The recommended assignment questions are:

1. How would you assess Morath's leadership at Children's Hospital so far? In what ways has she exhibited good leadership? In what ways might she have done better?
2. What would Morath need to do in her meeting with Matthew's parents to exhibit effective leadership? What would you do?
3. Imagine that you are Morath. Use the four Lift questions to help you prepare for your meeting with Matthew's parents. How does asking and answering these questions change how you feel about this meeting? How does asking and answering these questions change what you plan to do?
4. What does her interview with Matthew's parents have to do with her leadership of the employees in Children's Hospital and Clinics?
5. What does Morath need to do going forward to be an effective leader?

Timeline Allocation Plan

A possible timeline for an 85-minute version of this class follows:

5 mins.	Introduction
15 mins.	Evaluation of Morath's leadership so far
20 mins.	Role play and discuss the meeting with Matthew's parents
20 mins.	Discussion of lift as a way of understanding leadership
20 mins.	Moving forward at Children's Hospital and Clinics
5 mins.	Summary and bridge to the next class.

Class Overview

This case can be discussed in four pastures: an evaluation of Morath's leadership so far, a role play of Morath meeting with Matthew's parents, a discussion of lift and what it can teach us about leadership, and a discussion about what Morath should do next. For each of these pastures

we identify questions that the instructor can ask, topics that are likely to come up in the discussions, and, in the case of the role play, a description of how it might be managed.

Evaluation of Morath's leadership so far

The instructor can use the beginning of this class to accomplish two purposes. First, the beginning of class can be used to assess the students' understanding of leadership. If this class comes early in the course, then instructors can use this introductory discussion to learn what kinds of beliefs and biases students have about leadership at the outset of the course. If this class comes late in the course, the instructor can use this initial discussion to evaluate how well the students understand the material covered in the course so far.

The second purpose of evaluating Morath's leadership from a naïve perspective of from the perspective of topics covered in class so far is to set up a point of contrast. In the second pasture, when the instructor introduces lift, he or she can contrast lift with the students' understanding of leadership prior to being introduced to the lift concept.

The simplest way to have students evaluate Morath's leadership so far is to ask them where they think her leadership has been effective and where it has not. The instructor could then capture the students' responses on the board. If the students have already covered leadership concepts in the course but are not using them in this evaluation, the instructor may want to prompt the students by asking follow-up questions, such as "How would your evaluation be different if you were using last week's technical note as the basis for your evaluation?"

There is also an evaluation of Morath's leadership in the original teaching note for this case that traces Morath's actions through the various stages of implementing the patient safety initiative, which is an effective way to frame the conversation.

Role Play

After the students develop an assessment of Morath's leadership, the instructor can transition to the next pasture by telling students that the pressing issue on Morath's plate right now is her meeting with Matthew's parents. The instructor should then dive right into the role play, asking a student to play the role of Morath while the professor plays the role of one of Matthew's parents. Instructions for how to do this can be found in the original teaching note. After a few minutes of role playing, the instructor can begin a discussion of the role play by asking the rest of the class to evaluate their classmate's leadership in the role play.

Students usually have a wide range of opinions about what the most effective way is for Morath to handle the meeting with Matthew's parents. Many of these opinions revolve around some of the central tensions in the case, such as the importance of accountability relative to psychological safety and the fear of legal action relative to the value of transparency. The instructor should try to surface these tensions and capture them on the board. For example, if a student praises the student who participated in the role play for trying to preserve psychological safety in the hospital, then the instructor can ask if that raised any concerns for any of the other students. As the tensions in the case become clearer, the instructor can then ask the students how Morath should manage these competing tensions.

Somewhere in this discussion—either as the student's discuss "Morath's" effectiveness in the role play, or as they discuss how to manage the competing tensions of the Patient Safety

Initiative, one or more of the students are likely to raise the topic of whether or not using the questions and principles from *Lift* should make any difference. If they do, the instructor should make this issue explicit by asking a question like, “When you prepared for class, did asking the four questions change how you felt or what actions you thought you might take?” If they do not, the instructor should move the discussion in that direction by asking a question like, “How might Morath handle the situation differently if she were to use the four questions from *Lift*?” or “How could the four questions from *Lift* help Morath to manage these competing tensions?”

Students’ responses to questions about the four questions from *Lift* can vary widely. Some students may have trouble seeing the impact that these questions can have. Others will see the impact right away. To help the students see this impact, it can be useful to have the students walk through the questions one at a time, as if they are Morath preparing for her meeting with Matthew’s parents. For example,

- What result do I want to create?
Students will likely begin by thinking that the result that they want to create is to help Matthew’s parents feel better or to avoid a law suit. This is not actually a purpose. It is a problem. Instructors can help students to become more ambitious about their purposes by asking them questions like “Is that the best outcome you could hope for in this situation?” “What more could you hope for from Matthew’s parents?” “How could your meeting help Matthew’s parents even more?” “How could your meeting help Children’s Hospital?” As students wrestle with these questions, they might come up with purposes such as enrolling Matthew’s parents as participants in the Patient Safety Initiative to help Children’s hospital become a learning organization.
- What would my story be if I were living up to the values I expect of others?
If Morath were to hope that Matthew’s parents would participate with her instead of fighting against her, then she would have very high expectations of Matthew’s parents. The instructor can ask what these expectations are. Answers may include the expectation that Matthew’s parents will forgive, that they will be open to learning, and—during a time in which their instincts are to focus on themselves and their own pains—that they will instead reach out to help others. These are high expectations. If Morath is going to ask that of others, then she needs to hold herself to the same standards. The instructor can then ask the students to create some possible stories for Morath in which she forgives Matthew’s parents if they attack her, assumes that she can learn from Matthew’s parents and listens to what they have to say, and looks for ways that she can serve them.
- How do others feel about this situation?
Morath will find it much easier to forgive, listen, and serve Matthew’s parents if she empathizes with them, which she can do by imagining how they must feel. The instructor can help the students feel the empathy that Morath needs to feel by asking the students to imagine how Matthew’s parents must feel, to report those feelings, and to explain why they think his parents feel that way.

- What are three (or four or five) strategies I could use to accomplish my purpose for this situation?

Finally, the instructor can ask the students to come up with a few different ways in which they might approach the meeting with Matthew's parents. The instructor should make it clear to the students that even though they may have a way of approaching the meeting that they think is best they should nevertheless force themselves to come up with multiple, legitimate scenarios. As the students do this, the instructor can then ask the students how it makes them feel to have multiple scenarios available. The instructor can also ask the students how Morath would know if a particular approach was working in real time as she talks to Matthew's parents. Some students may be able to see how their curiosity and their beliefs about their skills and effectiveness change by virtue of having multiple options. If they do not, there is no need to worry, as they will be diving more deeply into this topic in the fifth class in this module.

Discussion of lift

As students begin to develop an understanding of what the four questions from *Lift* can do for Morath, it is useful to step back and have them reflect on what they can learn about leadership from the lift principles. One way to do this is to ask the students what Morath's meeting with Matthew's parents has to do with leadership. After all, Morath is the COO of Children's Hospitals and Clinics. The people she leads are hospital employees, not patients' parents. There are many answers that students can come up with to this question, most of which are viable answers. The purpose of this pasture is not to come up with right answers. Rather, it is to get the students to think of leadership in a broader and more complex way, and to see how the principles from *Lift* apply to this broad and complex way of seeing leadership. Some of the answers that the instructor may discuss with the students include:

1. **Indirect leadership:** This meeting with Matthew's parents has consequences for the hospital. Whether Matthew's parents end up enrolling in the Patient Safety Initiative, forgiving the near miss but not getting involved, continuing to demand the names of the responsible parties, or suing the hospital, it has consequences for the people that Morath is trying to lead, and consequences for her ability to lead them in the future.
2. **Leading by example:** The meeting with Matthew's parents is an opportunity for Morath to model the kinds of behaviors she hopes to see from hospital employees.
3. **Leadership as influence:** A formal definition of leadership is "a process of social influence." This means that Morath's meeting with Matthew's parents is, in and of itself, an opportunity to lead effectively, lead ineffectively, or fail to lead.

As students come up with answers to these questions, the instructor can follow up each substantive answer with a question about lift. For example, if a student answers that Morath's meeting with Matthew's parents is an opportunity to exhibit indirect leadership, then the instructor can follow up with a question like, "How can the four questions from *Lift* help people

exhibit more effective indirect leadership?” This will help the students to see the value of the principles more broadly.

If there is time, it can be useful to end this pasture by asking students to compare lift with other principles of leadership that they have learned in the course. Students answers in this section will vary, of course, depending on what other principles are covered in the course.

Moving Forward

In the final pasture of the class, the instructor should ask the students what Morath should be concerned about as she moves forward, and what she should do about each of these issues. A summary and discussion of these issues can be found in the original teaching note. Instructors can use the same outline in this class as the one posed in the original teaching note, but if there is time, they may also consider asking the students to use the four questions from *Lift* to help them address one or more of the issues that Morath faces. For example, if students argue that Morath needs a way to hold individuals accountable when an individual really is performing poorly, the instructor can use the four questions as a way of helping the students figure out how Morath might deal with that issue.

Summary and Conclusion

This class is designed to introduce students to lift as a tool that they can use in their leadership. Although the four questions from *Lift* are simple, their implementation in complex situations can be challenging. Therefore, the next five days of class are designed to dive more deeply into the underlying principles behind lift. The next class will focus on moving away from problem-solving and toward finding purpose.

CHANGE MANAGEMENT

Objectives

1. To introduce students to the central concepts and four questions of *Lift*.
2. To help students see how using these four questions can help them manage organizational change.

Assignment Questions

The recommended assignment questions are:

1. How well is the change process unfolding at Children's Hospital so far? What has gone well? What has not gone so well?
2. How is Morath's meeting with Matthew's parents relevant to managing change in Children's Hospital and Clinics? How would you manage this meeting if you were Morath?
3. Imagine that you are Morath. Use the four Lift questions to help you prepare for your meeting with Matthew's parents. How does asking and answering these questions change how you feel about this meeting? How does asking and answering these questions change what you plan to do?
4. What does Morath need to do going forward to make the change at Children's Hospital and Clinics successful?

Timeline Allocation Plan

A possible timeline for an 85-minute version of this class follows:

5 mins.	Introduction
15 mins.	Evaluation of the change so far
20 mins.	Role play and discuss the meeting with Matthew's parents
20 mins.	Discussion of lift as a tool for creating positive change
20 mins.	Moving forward at Children's Hospital and Clinics
5 mins.	Summary and bridge to the next class.

Class Overview

This case can be discussed in four pastures: an evaluation of the change process so far, a role play of Morath meeting with Matthew's parents, a discussion of lift as a tool for creating positive change, and a discussion about what Morath should do next. For each of these pastures

we identify questions that the instructor can ask, topics that are likely to come up in the discussions, and, in the case of the role play, a description of how it might be managed.

Evaluation of the change process so far

This class works best if it comes in the middle or toward the end of a course on change management. That way, the instructor can help the students apply principles from *Lift* to the processes, methods, and tools of change that have already been covered in the course. If this is the case then the instructor can use the first pasture in the discussion of Children's Hospital and Clinics to accomplish two purposes. First, this first pasture can be used to assess the students' understanding the change principles taught so far. By asking the students to evaluate the change process so far, it gives the instructor an opportunity to see how well the students are able to use these principles to evaluate a change process.

Getting students to review the principles taught so far also accomplishes a second purpose: it sets up a point of contrast. In the second pasture, when the instructor introduces lift, the instructor can help the students see what it is like to apply change principles with and without lift. This contrast will be easier to make if the students have already thought about the change process without using lift.

The simplest way to have students evaluate the change process so far is to ask them where they think the change process has been effective and where it has not. The instructor could then capture the students' responses on the board. If the students do not use principles that they have already covered to make their evaluation, the instructor may want to prompt the students by asking follow-up questions, such as "How would your evaluation be different if you were using last week's technical note as the basis for your evaluation?"

There is also an evaluation of the change process in the original teaching note for this case that traces Morath's actions through the various stages of the patient safety initiative.

Role Play

After the students develop an assessment of Morath's leadership, the instructor can transition to the next pasture by telling students that the pressing issue on Morath's plate right now is her meeting with Matthew's parents. The instructor should then dive right into the role play, asking a student to play the role of Morath while the professor plays the role of one of Matthew's parents. Instructions for how to do this can be found in the original teaching note. After a few minutes of role playing, the instructor can begin a discussion of the role play by asking the rest of the class what impact the meeting—as enacted by the student and the professor—is likely to have on the change process, and what else Morath could do in the role play that might affect the change process in different ways.

Students are likely to have many different opinions about how Morath should handle her meeting with Matthew's parents. Asking the students how these different ways of handling the role play will affect the change process should surface some of the central tensions in the case, such as the importance of accountability relative to psychological safety and the fear of legal action relative to the value of transparency. The instructor should try to surface these tensions and capture them on the board. For example, if a student praises the student who participated in the role play for trying to preserve psychological safety in the hospital, then the instructor can

ask if those same actions raised any concerns for any of the other students. As the tensions in the case become clearer, the instructor can then ask the students how Morath should manage these competing tensions.

Somewhere in this discussion—either as the student’s discuss “Morath’s” effectiveness in the role play, or as they discuss how to manage the competing tensions of the Patient Safety Initiative, one or more of the students are likely to raise the topic of whether or not using the questions and principles from *Lift* should make any difference. If they do, the instructor should make this issue explicit by asking a question like, “When you prepared for class, did asking the four questions change how you felt or what actions you thought you might take?” If they do not, the instructor should move the discussion in that direction by asking a question like, “How might Morath handle the situation differently if she were to use the four questions from *Lift*?” or “How could the four questions from *Lift* help Morath to manage these competing tensions?”

Students’ responses to questions about the four questions from *Lift* may vary widely. Some students may have trouble seeing the impact that these questions can have. Others may see the impact right away. To help the students see this impact, it can be useful to have the students walk through the questions one at a time, as if they are Morath preparing for her meeting with Matthew’s parents. For a description of the kind of topics the instructor might discuss as he or she goes through the four questions with the students, please see the bulleted analysis for each of these questions in the “Leadership” section, on pages 4 and 5 of this document.

Discussion of lift

As students begin to develop an understanding of what the four questions from *Lift* can do for Morath, it is useful to step back and have them reflect on how these four questions will affect the change process if Morath uses them. In the previous pasture, one of the questions focused on the impact that Morath’s meeting with Matthew’s parents can have on the broader change process. Now, after having discussed the four questions from *Lift*, the instructor can re-visit this question and ask how the meeting with Matthew’s parents might affect the change process if Morath is experiencing lift as she meets with them. If the instructor captures these answers on the board as well as the earlier answers, it can present some compelling contrasts that the students can see for themselves. These contrasts can then be crystallized with a question like, “What role can lift play in helping change agents to ensure that an organizational change is a positive change?” and “What makes a change a positive change?” The answers to these questions are intended only to be a preliminary discussion, as the students will re-visit these questions again at the end of the course module on *Lift*. The instructor may want to mention this so that the students know what to expect.

Moving Forward

In the final pasture of the class, the instructor should ask the students what Morath should be concerned about as she moves forward, and what she should do about each of these issues. A summary and discussion of these issues can be found in the original teaching note. Instructors can use the same outline in this class as the one posed in the original teaching note, but if there is time, they may also consider asking the students to use the four questions from *Lift* to help them address one or more of the issues that Morath faces. For example, if students argue that Morath

needs a way to hold individuals accountable when an individual really is performing poorly, the instructor can use the four questions as a way of helping the students figure out how Morath might deal with that issue.

Summary and Conclusion

This class is designed to introduce students to lift as a tool that they can use in managing change. Although the four questions from *Lift* are simple, their implementation in complex situations can be challenging. Therefore, the next five days of class are designed to dive more deeply into the underlying principles behind lift. The next class will focus on moving away from problem-solving and toward finding purpose.

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POWER AND POLITICS

Objectives

1. To introduce students to the central concepts and four questions of *Lift*.
2. To help students see how using these four questions can increase the positivity of their power and influence.

Assignment Questions

The recommended assignment questions are:

1. Analyze Morath's power and influence within Children's Hospital and Clinics. What are her sources of power? What tactics has she used?
2. How much power does Children's Hospital and Clinics have to implement the Patient Safety Initiative within an organizational field full of patients, families, consumer advocacy groups, law firms, insurance providers, government regulators, medical suppliers, and so forth? What obstacles does Children's Hospital and Clinics face?
3. Analyze the power that Morath has in her impending meeting with Matthew's parents. What sources of power and influence tactics should she draw on in this conversation. How would you manage this meeting if you were Morath?
4. Now, imagine that you are Morath preparing for her meeting with Matthew's parents again, but this time use the four questions from *Lift* to help you prepare for the meeting. How does asking and answering these questions change how you feel about this meeting? How does asking and answering these questions change what you plan to do?
5. What does Morath need to do going forward to make the Patient Safety Initiative successful?

Timeline Allocation Plan

A possible timeline for an 85-minute version of this class follows:

5 mins.	Introduction
20 mins.	Evaluation of the power and politics of Children's Hospital and Clinics
20 mins.	Role play and discuss the meeting with Matthew's parents
20 mins.	Discussion of lift as a tool for becoming a positive influence
15 mins.	Moving forward at Children's Hospital and Clinics
5 mins.	Summary and bridge to the next class.

Class Overview

This case can be discussed in four pastures: an analysis of the power dynamics surrounding Children's Hospital, a role play of Morath meeting with Matthew's parents, a discussion of lift as a psychological state and a form of positive influence, and a discussion about what Morath should do next. For each of these pastures we identify questions that the instructor can ask, topics that are likely to come up in the discussions, and, in the case of the role play, a description of how it might be managed.

Analysis of Power Dynamics

This class can be used at different times in a course on power and politics. If it is used at the beginning of the course, it can be used to frame how people should approach the use of power and influence throughout the course. If it is used in the middle or at the end of the course, then it can serve as a point of contrast to other techniques for understanding power and influence.

Whenever this class fits into the course schedule, an instructor can use the first pasture in the discussion of Children's Hospital and Clinics to accomplish two purposes. First, this pasture can be used to assess the students' understanding of power and politics. If this class occurs at the beginning of the course, then the assignment questions that ask students to evaluate Morath's power and the power of Children's Hospitals and Clinics can be used to help the instructor assess the knowledge that students bring with them to the course. If this class occurs later in the course, the instructor can use these questions to assess the students' ability to apply the frameworks they have learned so far to analysis the power dynamics in an organizational setting.

Getting students to review the course principles taught so far also accomplishes a second purpose: it sets up a point of contrast. In the second pasture, when the instructor introduces lift, the instructor can help the students see what it is like to use power and exert influence with and without lift. This contrast will be easier to make if the class discussion has already covered an analysis of power and politics in general.

A simple way to have the students evaluate Morath's power would be to have them list sources of power that she does and does not have available to her. Students should be encouraged to use principles they have already covered if this class occurs late in the course. Instructors can do this by asking questions such as "How would your analysis be different if you were using last week's technical note?"

Some of the sources of power that Morath has include:

- Formal authority – Morath is the COO
- Backing from the CEO, which obtained before she was hired
- Backing from the insurance company, obtained through early discussions about her plans
- Control over the budget and investments for hospital operations
- A carefully-developed network of early adopters
- A reputation as an excellent hospital administrator
- An early investment after being hired to establish her credibility within Children's
- Early successes to establish a performance record

- Personal attributes, such as determination and compassion
- Rafts of analysis on medical errors and access to the latest research
- Access to stories and questions that elicit stories about medical errors, which hospital employees find moving and motivating
- This initiative is consistent with the values of the staff and the medical profession in general

Some liabilities in Morath's power include:

- A lack of an accepted way to measure success
- Vulnerability to lawsuits
- Inability to hold individuals accountable for actual performance problems
- Lack of time to implement all of the learnings that come from Focused Event Studies
- Lack of an infrastructure to manage the implementation of system improvements

Some influence tactics Morath used include:

- Scarcity – there were few candidates with Morath's qualifications for Children's to choose from when Children's was hiring, and even Morath was not a given
- Reciprocity – Morath wanted support in making patient safety a priority in return for accepting the job offer
- Commitment – By obtaining commitment in advance, Morath acquired the backing she needed to launch the initiative
- Social proof – Morath's data and her questioning about their own experience helped convince people that they were closer to the national average than they thought. Also, by enrolling people early, she created a feeling that this is where people in the organization were headed anyway.
- Authority – Morath used her authority to make requests. People could also count on her authority over the budget and other such resources when she made these requests.
- Automaticity – By requesting people to get involved in things that they wanted to see happen anyway, there was natural appeal moving them to action.

With regards to the sources of power that Children's Hospital has within the broader organizational field, some are:

- Children's hospital is part of a growing coalition of health care professionals interested in treating medical errors as systemic rather than individual problems
- The most cutting edge research supports this viewpoint

And some of Children's Hospital's liabilities are:

- Transparency and accountability are more easily accepted by the general public and consumer advocacy groups know how to play this card
- Suing hospitals is easy to do in a litigious society
- Insurance companies tend to be highly risk averse
- Lack of data to show a decrease in medical errors and other forms of improved safety

As students identify these and other issues regarding power and influence around the Patient Safety Initiative, it can also be useful to ask how Morath and Children's hospital can use their assets to offset their liabilities. This could lead to discussions, for example, about how research suggests that being forthright and compassionate with patients and their families can reduce the likelihood of doctors being sued at the same time that it makes them more vulnerable to being sued. This is just one of many nuances that students can discuss as they consider the power dynamics at Children's Hospital. The instructor will need to keep a close eye on the time to make sure that the conversation moves into the next pasture after about twenty minutes in order to ensure that there is enough time for subsequent discussions.

Role Play

After the students analyze the power dynamics at Children's Hospital, the instructor can transition to the next pasture by asking the students what sources of power Morath will be able to draw on and what influence tactics she can use in her meeting with Matthew's parents. Possible answers include:

- Expertise: Morath is a medical professional with 25 years experience. She also has training and experience in understanding medical errors. She can draw on this expertise when explaining the situation to Matthew's parents.
- Authority: Morath is the COO and can decide how to deal with the people involved in Matthew's overdose.
- Knowledge: Morath knows what happened to lead to Matthew's overdose of morphine, and can decide what to reveal.

Matthew's parents, on the other hand can sue the hospital if they are unsatisfied with Morath's answers and spread bad news about the hospital in the community.

As the students identify the power dynamics involved in this conversation, the instructor can ask the students what these power dynamics suggest about how Morath should handle her meeting with Matthew's parents. After receiving four or five answers, the instructor should then ask one of the students to be Morath in a role play of the meeting. The professor can play the role of one of Matthew's parents. Instructions for how to perform the role play can be found in the original teaching note.

After a few minutes of role playing, the instructor should ask the rest of the class to evaluate Morath's performance in the role play. Students are likely to have many different opinions about how Morath should handle her meeting with Matthew's parents, and as they express these opinions they will probably surface some of the central tensions in the case, such as the importance of accountability relative to psychological safety and the fear of legal action relative to the value of transparency. The instructor should try to surface these tensions and capture them on the board. For example, if a student praises the student who participated in the role play for trying to preserve psychological safety in the hospital, then the instructor can ask if those same actions raised any concerns for any of the other students. As the tensions in the case become clearer, the instructor can then ask the students how Morath should manage these competing tensions.

Somewhere in this discussion—either as the student’s discuss “Morath’s” effectiveness in the role play, or as they discuss how to manage the competing tensions of the Patient Safety Initiative, one or more of the students may raise the topic of whether or not using the questions and principles from *Lift* should make any difference. If they do, the instructor should make this issue explicit by asking a question like, “When you prepared for class, did asking the four questions change how you felt or what actions you thought you might take?” If they do not, the instructor should move the discussion in that direction by asking a question like, “How might Morath handle the situation differently if she were to use the four questions from *Lift*?” or “How could the four questions from *Lift* help Morath to manage these competing tensions?”

Students’ responses to questions about the four questions from *Lift* may vary widely. Some students may have trouble seeing the impact that these questions can have. Others may see the impact right away. To help the students see this impact, it can be useful to have the students walk through the questions one at a time, as if they are Morath preparing for her meeting with Matthew’s parents. For a description of the kind of topics the instructor might discuss as he or she goes through the four questions with the students, please see the bulleted analysis for each of these questions in the “Leadership” section, on pages 4 and 5 of this document. It may also be useful to conduct the role play again after they have “prepared for the meeting” a second time.

Discussion of lift

As students begin to develop an understanding of what the four questions from *Lift* can do for Morath, it is useful to ask them how the use of these four questions might change the power dynamics in the meeting. Some useful observations about these power dynamics may include the recognition that Morath:

- is attempting to exercise power with Matthew’s parents, rather than power over them—allowing herself to be influenced as well as influencing
- is exercising her power toward larger ends
- does not see her liabilities as weakness, but rather as an opportunity to collaborate
- seeks to change her state rather than draw on supposedly unchanging attributes
- influences as much because of who she is as she does because of what she does
- is attractive to others because of her concern for them
- draws power for her faith that she can figure out what to do as she goes along rather than from using her knowledge and expertise to control the situation

Each of these answers (and others as well) can be compared and contrasted with more traditional sources of power and tactics for influence. As students begin to see these differences, the instructor can ask them what they find exciting and what they find worrisome about the type of power that people draw on when they try to experience lift. For example, some students may be thrilled with the idea that they can work collaboratively with others toward higher ends. On the other hand, the ambiguity of pursuing ends that they do not know how to accomplish may be frightening. Allow the students to feel positively or negatively about these characteristics of lift. There will be time over the remaining classes in the course module to address each of these concerns more fully.

Moving Forward

In the final pasture of the class, the instructor should ask the students what Morath should be concerned about as she moves forward, and what she should do about each of these issues. A summary and discussion of these issues can be found in the original teaching note. Instructors can use the same outline in this class as the one posed in the original teaching note, but if there is time, they may also consider asking the students to use the four questions from *Lift* to help them address one or more of the issues that Morath faces. For example, if students argue that Morath needs a way to hold individuals accountable when an individual really is performing poorly, the instructor can use the four questions as a way of helping the students figure out how Morath might deal with that issue.

Summary and Conclusion

This class is designed to introduce students to lift as a tool that they can use in managing change. Although the four questions from *Lift* are simple, their implementation in complex situations can be challenging. Therefore, the next five days of class are designed to dive more deeply into the underlying principles behind lift. The next class will focus on moving away from problem-solving and toward finding purpose.