



**HARVARD**  
MEDICAL SCHOOL



# Coaching in Leadership and Healthcare

September 28-29, 2018

Renaissance Boston Waterfront Hotel, Boston, MA



**OFFERED BY**



**McLean HOSPITAL**  
HARVARD MEDICAL SCHOOL AFFILIATE



**INSTITUTE OF  
COACHING**

MCLEAN HOSPITAL, HARVARD MEDICAL SCHOOL AFFILIATE

Earn up to 13 *AMA PRA Category 1 Credits™*

## **COURSE DIRECTORS**

**Carol Kauffman, PhD, ABPP, PCC • Margaret Moore, MBA**

**Christopher Palmer, MD**

**<https://tinyurl.com/cmeregistration-Coaching2018>**

# Course Description

Dear Colleague,

The 11<sup>th</sup> annual Coaching in Leadership & Healthcare conference is offered by the Institute of Coaching, McLean Hospital, and Harvard Medical School. Our goal is to serve leaders, physicians, healthcare providers, executive coaches, life coaches and health and wellness coaches. This energizing and groundbreaking event features keynotes by world leaders in leadership, neuroscience, health and well-being, coaching, behavioral and positive psychology.

Our breakout sessions give participants the opportunity to take a deeper dive into the science and art of coaching. These 90 minute sessions are led by some of our keynote presenters as well as highly respected thought leaders and senior coaches. We offer breakout sessions in six domains:

1. Leadership
2. Health & Well-Being
3. Positive Psychology
4. Advanced Practice
5. Special Topics
6. Research Symposium

We also offer a poster session during the Friday evening reception to bring you the latest coaching research.

Professional coaching and professionals developing coaching skills are a powerful catalyst in the business, nonprofit and healthcare domains. Executive and leadership coaches play a critical role in developing high-performing leaders who lead in a VUCA world (volatile, uncertain, complex, ambiguous). In nonprofit organizations, coaching helps empower leaders and communities to live their missions more effectively. In the healthcare industry, applying science-based coaching competencies can improve motivation and the capacity of patients to develop and sustain health-giving behaviors. As treatment of lifestyle-related chronic diseases consumes 70% of healthcare costs, the field helps meet a growing human and economic crisis. The business and healthcare market for coaching is growing rapidly.

The conference is led by the Institute of Coaching ([www.instituteofcoaching.org](http://www.instituteofcoaching.org)). Our mission is to bring the highest quality education and thought leadership to both the seasoned coach as well as those adding coaching skills to their repertoire of leadership or professional services. We offer extensive education at our website to support your conference learning. Thank you for joining our event.

Sincerely,



Carol Kauffman, PhD, ABPP, PCC



Margaret Moore, MBA



Christopher Palmer, MD

# Learning Objectives

At the end of this conference, participants will be able to:

- Summarize a variety of models, theories, and domains of psychology and leadership and apply these in coaching practice.
- Translate the newest research into concepts and interventions that can be used in coaching.
- Apply basic coaching skills in medical, therapeutic, or leadership practices to enhance outcomes.
- Practice advanced coaching skills applicable to leadership and healthcare.

## Faculty

*\*Deepa Bajaj*

*\*Ethan S. Bernstein, DBA, MBA, JD*

*\*Richard E. Boyatzis, PhD*

Alexander Caillet

Shelley Carson, PhD

*\*Dorie Clark*

Susan David, PhD

Elizabeth Pegg Frates, MD

*\*Kristalina Georgieva*

Siegfried Greif, PhD

Professor Erik de Haan, MA, MSc, PhD

Heidi Hanna, PhD

Deborah Helsing, EdD

Nadine Hemmer

Jeffrey Hull, PhD

Carol Kauffman, PhD, ABPP, PCC

Eric Kaufmann

*\*Vinod Kumar*

*\*Om Lala, MD, MBA, MPH*

*\*Christina Maslach, PhD*

Kerri Palamara McGrath, MD

Joanna Molyn, PhD, PGCHE, MBA, BSc

Margaret Moore, MBA

Christopher M. Palmer, MD

Angela Passarelli, PhD

Stephanie R. Peabody, PhD

*\*Nancy E. Pfund*

Eddie Phillips, MD

Scott L. Rauch, MD

Helen Riess, MD

Benjamin Schoendorff, MA, MSc

Joji Suzuki, MD

*\*Mark Thompson, EdD*

Irina Todorova, PhD

*\*Dianne Vella-Brodrick, PhD*

*\*Mark T. Wallace, PhD*

*\*Ashley V. Whillans*

Amy Yeager

*\*Benjamin Zander*

*\*Roz Zander, MSS, LICSW*

*\*Keynote Speaker*

## Who Should Attend

1. Physicians, nurses, psychologists, social workers, licensed mental health counselors, executive and lifestyle coaches
2. Most healthcare professionals and coaches who are interested in learning how to better motivate their patients/clients in harnessing their motivation, making lasting changes, and achieving their goals.
3. National and international learners anticipated

# Plenary Keynote Speakers



**Mark Thompson, EdD**, is an expert on executive leadership, business strategy, and innovation who has spent over 25 years leading teams and building companies from the ground up. He delivers actionable, valuable and practical advice for leaders at all levels of an organization.

*New York Times* bestselling author Mark Thompson is a leadership coach for the world's fastest growing, most innovative companies—from LYFT CEO & Co-founder Logan Green, Pinterest Co-founder Evan Sharp and World Bank CEO Dr. Kristalina Georgieva, to founders Richard Branson, Steve Jobs, Tony Robbins and Charles Schwab, for whom he served as the world's first CXO—Chief Customer Experience Officer.



**Richard E. Boyatzis, Ph.D.**, is the H.R. Horvitz Professor of Family Business and has been at Case Western Reserve University for more than 23 years, but his distinguished career includes more than 43 years of research that has been published in multiple fields, including medicine, psychology, substance abuse, health, education and a variety of domains within management and organizational behavior. With appointments in the departments of Organizational Behavior, Psychology and Cognitive Science, Boyatzis has authored more than 125 articles and books. His books have been published in 28 languages, and his work *Primal Leadership* earned a spot on nonfiction best seller lists in the United States, Canada, Japan and Spain.



**Christina Maslach, AB, PhD**, is a Professor of Psychology (Emerita) and a researcher at the Healthy Workplaces Center at the University of California, Berkeley. She is widely recognized as one of the pioneering researchers on job burnout, who has written numerous articles and books, including *The Truth About Burnout*, and has developed the leading research measure (the Maslach Burnout Inventory). Several of her articles have received awards for their significance and high impact, including her longitudinal research on early burnout predictors, which was honored in 2012 as one of the 50 most outstanding articles published by the top 300 management journals in the world. Recently, she received the 2017 Application of Personality and Social Psychology Award, as well as a lifetime career achievement award for her work on burnout. Christina received national recognition as Professor of the Year by the Carnegie Foundation and The Council for the Advancement and Support of Education. She has been president of the Western Psychological Association, is a fellow of the American Association for the Advancement of Science and of the European Academy of Occupational Health Psychology, and has received the Berkeley Citation and the Distinguished Teaching Award from U.C. Berkeley.



**Mark T. Wallace, PhD**, is the Dean of the Graduate School, Associate Director of the Vanderbilt/NIMH Silvio O. Conte Center for Neuroscience Research and Louise B. McGavock Endowed Chair. He is a Professor in the Department of Hearing and Speech Sciences at Vanderbilt University School of Medicine, Professor in the Department of Psychology, Professor in the Department of Psychiatry, a member of the Vanderbilt Kennedy Center for Research on Human Development, a member of the Center for Integrative and Cognitive Neuroscience, and a member of the Vanderbilt Vision Research Center.



**Ben & Roz Zander, Benjamin** is the conductor of The Boston Philharmonic Orchestra and a guest conductor around the world. With London's famed Philharmonic Orchestra, he is recording the complete cycle of Mahler symphonies for Telarc, recordings which have been received with extraordinary critical acclaim and several awards. Their latest recording of Bruckner's 5th Symphony was nominated for a 2010 Grammy and has received critical acclaim both for the performance and Zander's now famous full-length disc explaining the music for the lay listener. They recorded their next release, Mahler's 2nd Symphony, in January 2012 and it is scheduled for release later this year. **Rosamund, "Roz"**, is a pioneer in the field of leadership and relationship. She has created a leadership model that coaches individuals to create a life of vision, passion and contribution. Her work is, in all its capacities, about growth. Her writing, teaching, and coaching creates pathways to lives that are authentic and meaningful.

# AGENDA

## Friday, September 28, 2018

7:00 am **Registration and Continental Breakfast**

8:00 am **Welcome and Opening Remarks**  
Scott L. Rauch, MD; Christopher Palmer, MD

8:15 am **The Future of Coaching**  
Carol Kauffman, PhD, ABPP, PCC; Susan David, PhD; Margaret Moore, MBA

9:00 am **Driving Transformational Change—Lessons from the C-Suite**  
**C-Suite Panelists:** Deepa Bajaj, PayPal Holdings, Inc; Kristalina Georgieva, World Bank; Vinod Kumar, TATA Communications; Nancy Pfund, DBL Partners  
**Presenter:** Mark Thompson, EdD  
**Introduction:** Carol Kauffman, PhD, ABPP, PCC

10:30 am **Break & Networking**

### DOMAIN KEYNOTES — 11:00am-12:30pm

Choose One Domain Keynote — Assigned on a First-Come, First-Served Basis

Domain Keynote 1  
Special Topics  
**The Entrepreneurial Coach**  
Dorie Clark  
Introduction: Susan David, PhD  
Coaching is immensely fulfilling – but there's only so much time in the day to work with clients. Many of us, frustrated with "trading time for dollars," have sought strategies to build passive income and develop multiple revenue streams.  
Duke University adjunct professor Dorie Clark will share research-based strategies for how coaches can earn more by developing new income streams. She'll also share her own experience, including how she grew her revenue by more than \$200,000 per year.

Domain Keynote 2  
Well-Being  
**A Behavioral Science Perspective to Building a Happier and More Engaged Workforce**  
Ashley V. Whillans  
Introduction: Margaret Moore, MBA  
What does behavioral science have to say about how to encourage employee well-being, pro-sociality, and productivity? In this talk, Dr. Ashley Whillans will discuss the latest findings from behavioral science that help to shed light on these critical questions. Prof. Whillans will also discuss the barriers of implementing these findings in workplaces and discuss novel solutions for overcoming these challenges to improve productivity, health, and happiness.

12:30pm - 2:00pm **Lunch (on your own)**

## TRACKS — 2:00–3:30pm

Choose One Track — Assigned on a First-Come, First-Served Basis

### Track 1 Leadership

#### **Applying Acceptance & Commitment Therapy in Executive Coaching**

Nadine Hemmer; Benjamin Schoendorff, MA, MSc

Moderator: Helen Riess, MD

Psychological flexibility (a/k/a emotional agility) promotes valued living in and out of the workplace. It makes it easier to choose to act to move toward one's personal and professional goals and values and overcome unhelpful thinking patterns, difficult emotions and all that shows up and gets in the way. Psychological Flexibility predicts and reinforces mental health outcomes and contributes to optimizing performance and overall functioning (Kashdan, Rottenberg, 2010). Acceptance and Commitment Training (ACT) seeks to train psychological flexibility in work settings. The ACT matrix is a simple and intuitive model that eases the integration of psychological flexibility training into your existing coaching practice to enhance client engagement and outcomes. The ACT matrix can help better align your coaching practice with your clients' expectations, enhancing agility and flexibly adapting to client needs.

### Track 2 Leadership

#### **Business Transformation: Drive Change and Create a Culture of Innovation**

Deepa Bajaj; Kristalina Georgieva; Vinod Kumar; Nancy Pfund; Mark Thompson, EdD

Moderator: Carol Kauffman, PhD, ABPP, PCC

We will discuss methods and strategies used to:

- Engage leaders and teams not only to embrace change, but lead organizational transformation
- Reduce the fear of failure for disruptive ideas
- Create incentive systems that reward those that challenge “business as usual”
- Empower employees at every level in an international organization to increase inclusivity.

### Track 3 Advanced Practice

#### **Team Coaching: The Art and Science**

Alexander Caillet; Amy Yeager

Moderator: Jeffrey Hull, PhD

Unique among team development modalities, team coaching involves making real-time interventions as a team performs real work—which helps to generate in-the-moment awareness, immediate shifts in behavior, and sustainable improvements in effectiveness and results. Based on our experience over the past 25 years, working with hundreds of teams across five continents.

### Track 4 Health & Well-Being

#### **The Cutting Edge of Motivational Interviewing**

Joji Suzuki, MD

Moderator: Eddie Phillips, MD

Motivational interviewing (MI) has emerged as one of the most critical evidence-based approaches when working with patients to promote behavior change. Originally developed in the context of treating substance use disorders, MI is a collaborative method of communication that pays particular attention to the language of change. MI helps to strengthen intrinsic motivation for change by exploring the patient's own reasons for change within an atmosphere of acceptance, partnership, evocation and compassion. This presentation is designed to introduce the basic MI principles including the four processes, spirit of MI, and change/sustain talk.

Track 5 Leadership	<b>Research Symposium: Leadership Coaching</b> Chair: Joanna Molyneux, PhD, PGCE, MBA, BSc Speaker: Professor Erik de Haan, MA, MSc, PhD  Presentations from coaching researchers will convey the latest findings in the coaching world and practical application to enhance coaching practice.
Track 7 Health & Well-Being	<b>Research Symposium: Health and Wellness Coaching</b> Chair: Irina Todorova, PhD Speaker: Siegfried Greif, PhD  Presentations from coaching researchers will convey the latest findings in the coaching world and practical application to enhance coaching practice.
3:30 pm	<b>Break &amp; Networking</b>
4:00 pm	<b>Art Keynote: Possibility</b> Benjamin Zander; Roz Zander, MSS, LICSW  In this ad-lib and interactive experience, possibilities will be distinguished through stories, examples and perhaps a musical performance. The presentation will leave the audience thinking and feeling joyous, open, inspired and ready to act.
5:15 pm	<b>Networking Reception &amp; Poster Session</b>
6:45 pm	<b>Networking Reception Concludes</b>

## Saturday, September 29, 2018

7:00 am	<b>Registration and Continental Breakfast</b>
8:00 am	<b>Welcome and Award Presentations</b> <i>Vision of Excellence Award</i>  Recipient: Richard E. Boyatzis, PhD Carol Kauffman, PhD, ABPP, PCC; Margaret Moore, MBA; Christopher M. Palmer, MD
8:45 am	<b>Viewing Coaching Through the Lens of Multisensory Perception and Plasticity: A Neuroscience Perspective</b> Mark T. Wallace, PhD Introduction: Carol Kauffman, PhD, ABPP, PCC
9:45 am	<b>New Perspectives on Burnout</b> Christina Maslach, PhD Introduction: Irina Todorova, PhD
10:45 am	<b>Break &amp; Networking</b>

### DOMAIN KEYNOTES — 11:15am–12:30pm — Choose One Domain Keynote

Domain Keynote 1 Leadership	<b>Harvard Business School Case: Developing and Coaching Effective Managers</b> Ethan S. Bernstein, DBA, MBA, JD; Om Lala, MD, MBA, MPH Introduction: Carol Kauffman, PhD, ABPP, PCC; Margaret Moore, MBA  The best organizations can rarely survive a poor manager's reluctant efforts to lead them, and even the most average organizations can be made great by a good manager. In this new HBS case on "Coaching Makena Lane", we look at the role of coaching in developing effective managers. The case is a rare look into the unedited materials of a real-life executive coaching process that was used to try to improve the trajectory of a high-potential manager on her path to being an effective executive. (While all names have been disguised for confidentiality, everything else is raw and real.)
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Domain  
Keynote 2  
Positive  
Psychology

## **Positive Psychology and Coaching for Youth/In Education**

Dianne Vella-Brodrick, PhD

Introduction: Susan David, PhD

Coaching psychology involves the mobilization of personal strengths and external resources to strive towards achieving authentic goals for optimal performance and well-being. To achieve these outcomes, an interdisciplinary approach which draws on the latest theories, tools, interventions and methods from across the various well-being sciences is ideally needed. However, to what extent are scholars and practitioners from the well-being sciences sharing and utilizing the latest developments from each discipline and working collaboratively and intentionally to achieve collective goals? This presentation will provide some evidence that communication between coaching psychology and other well-being sciences such as positive psychology, sport psychology, quality of life and social emotional learning is minimal and needs to be improved. Ways in which interdisciplinary knowledge exchange can occur to improve Coaching Psychology will be presented and illustrated with practical case examples.

12:30 pm -  
2:00pm

### **Lunch (on your own)**

## **TRACKS — 2:00pm–3:30pm**

Choose One Track - Assigned on a First-Come, First-Served Basis

Track 1  
Well-Being &  
Leadership

### **Coaching Basics in Motion**

Margaret Moore, MBA

Synthesizing the important science that supports coaching competencies, and drawing upon the rich library of theory, research and thought leaders assembled by the Institute of Coaching, this track will present a step by step tour of coaching basics in the format of a coaching demonstration.

Track 2  
Leadership

### **The Framework for Cultivating the Mind, Skills and Beliefs of Being A Conscious Leader**

Eric Kaufmann; Om Lala, MD, MBA, MPH

This program is a blueprint for leaders who can look within and commit their mind and heart to making a real difference in their world. This program is as powerful as it is empowering and offers a practical path for leaders to:

- Learn to balance profit, people, planet, and purpose
- Understand the role of ego, but not worship it
- Empower people by moving from ME mindset to WE mindset
- Practically apply great passion AND genuine compassion

Track 3  
Advanced  
Practice

### **Vertical Development in Coaching**

Deborah Helsing, EdD

Moderator: Helen Riess, MD

The demands of work increasingly require everyone to be changing and improving, constantly evolving to handle ever-increasing complexity. While the particulars of any one role or work environment will vary, there is a predictable underlying trajectory of evolutionary growth all adults can travel...with the right blend of challenge and support. When coaches can identify and work at this deep level with our clients, it can lead to profound changes in all areas of a client's life. In this workshop, Deborah Helsing will show you how to seek out and identify the most common, limiting client beliefs to target and illustrate coaching strategies you can use to help clients transform.



Track 4 Health & Well-Being	<b>Brain Health and Performance: Helping Clients Reach Their Full Potential</b> Shelley Carson, PhD; Heidi Hanna, PhD; Stephanie R. Peabody, PsyD, HSPP Moderator: Elizabeth Pegg Frates, MD  Whether your coaching practice focuses on leadership, wellness, or personal betterment, the brain health and performance of your clients and yourself are crucial to facilitating optimal lifestyle behaviors and responses. In this session, we will provide an introduction to the rapidly-emerging field of brain health and performance (BHP). We will describe what BHP is, why it is so important now, and how it is relevant to the professional coaching arena.
Track 5 Well-Being & Leadership	<b>Finding Paths to Healthier Workplaces</b> Christina Maslach, PhD Moderator: Kerri Palamara McGrath, MD  There is a lot of evidence that poorly designed work environments can be stressful and socially toxic, leading to negative outcomes for both the organization and the people who work there. Fixing this problem requires as much attention to improving the job conditions, as it does to strengthening individuals. Several strategies can be used to achieve a better fit between the person and the job, leading to an enhancement of engagement and well-being, and the reduction of the risk of burnout.
Track 6 Health & Well-Being	<b>Research Symposium: Health and Wellness Coaching</b> Chair: Irina Todorova, PhD  Presentations from coaching researchers will convey the latest findings in the coaching world and practical application to enhance coaching practice.
Track 7 Leadership	<b>Research Symposium: Leadership Coaching</b> Chair: Jeff Hull, PhD Speaker: Angela Passarelli, PhD, BCC  Presentations from coaching researchers will convey the latest findings in the coaching world and practical application to enhance coaching practice.
3:30 pm	<b>Break &amp; Networking</b>
4:00 pm	<b>The Heart of Coaching: Dreams, Possibilities and Sustained Change</b> Richard E. Boyatzis, Ph.D Introduction: Carol Kauffman, PhD, ABPP, PCC  We are told by many to focus coaching on solving the client's problems and to take the client's statement of their problem/s as the main context of our coaching discussions. Research reveals the opposite. When coaching discussions are problem focused, the client becomes slightly to greatly defensive, narrows their focus and perception, reduces cognitive capability and sustainability of efforts at change or learning. IF, on the other hand, the context of the coaching discussions is the emergence or articulation of the client's dreams, vision and possibilities, and creating and maintaining a resonant relationship between client and coach, the client is open to learning and change, new ideas, and people. The client becomes neurologically and hormonally energized. He or she experiences emotional replenishment and renewal rather than the exhaustion of the stress of change. This results in greater sustainability of efforts even after the coaching discussions end. The potential for peer coaching to extend the process into the fabric of an organization offers the promise of organizations developing coaching cultures. These ideas and supporting research will be reviewed in this iconoclastic closing keynote.
5:00 pm	<b>Stepping Toward the Future, Together</b> Carol Kauffman, PhD, ABPP, PCC; Susan David, PhD; Margaret Moore, MBA



## Registration Information

Physicians \$575, Doctoral Level Professionals \$575, Residents/Fellows/Allied Health Professional/Other \$495.

*Does not include processing (service fee) of \$5. All fees shown in USD.*

Registration by credit card (VISA, MasterCard or American Express) can be made at:

<https://tinyurl.com/cmeregistration-Coaching2018>

Registration by check (draft on a United States bank), please make payable to Harvard Medical School. Learners who choose to pay by check will be prompted to download an online form to send in with a payment. Telephone or fax registration is not accepted. Registration with cash payment is not permitted. Upon receipt of your paid registration an email confirmation from the HMS-DCE office will be sent to you. Be sure to include an email address that you check frequently. Your email address is used for critical information including registration confirmation, evaluation and certificate.

## Venue

Renaissance Boston Waterfront Hotel  
606 Congress St, Boston, MA 02210  
Phone: 617-338-4111

## Accommodations/Travel

A limited number of rooms have been reserved at the **Renaissance Boston Waterfront Hotel**, 606 Congress Street, Boston, MA 02210 until September 7, 2018. To make a reservation, please call 1-877-901-6632 and indicate that you are attending the "McLean Coaching Conference" to receive the conference rate or visit:

<https://book.passkey.com/go/McLeanCoachingConf>

Though the block expires September 7th, 2018, please book as soon as possible as many conferences are scheduled in Boston at this time and hotel rooms will be limited and expensive.

## Refund Policy

Refunds, less an administrative fee of \$75, will be issued for all cancellations received at least two weeks prior to the start of the course. Refund requests must be received by postal mail, email, or fax. No refund will be issued should cancellation occur less than two weeks prior. "No shows" are subject to the full course fee and no refunds will be issued once the conference has started.

## **Inquiries**

Contact us by phone at 617-384-8600, Monday – Friday, 9 am to 5 pm (ET) or by email at: [ceprograms@hms.harvard.edu](mailto:ceprograms@hms.harvard.edu).

## **Accreditation**

**Physicians:** The Harvard Medical School is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

The Harvard Medical School designates this live activity for a maximum of 13 *AMA PRA Category 1 Credits*<sup>™</sup>. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

**Psychologists:** McLean Hospital is approved by the American Psychological association to sponsor continuing education for psychologists. McLean Hospital maintains responsibility for this program and its content. Participants meeting requirements will receive 13 CE credits.

**Nurses:** This program meets the requirements of the Massachusetts Board of Registration in Nursing (244 CMR 5.00) for 13 contact hours of nursing continuing education credit.

**Social Workers:** Please contact us at 617-855-3140 for the status of social work CE accreditation.

**International Coach Federation (ICF):** Application for ICF core competency continuing education credits from the International Coach Federation has been submitted. Please call 617-855-3195 for status of application.

**The Royal College of Physicians and Surgeons of Canada** recognizes conferences and workshops held outside of Canada that are developed by a university, academy, hospital, specialty society or college as accredited group learning activities. Through an agreement between the American Medical Association and the European Union of Medical Specialists, physicians may convert *AMA PRA Category 1 Credits*<sup>™</sup> to an equivalent number of European CME Credits<sup>®</sup> (ECMECs<sup>®</sup>). Information on the process of converting *AMA PRA Category 1 Credits*<sup>™</sup> to ECMECs<sup>®</sup> can be found at: [www.eaccme.eu](http://www.eaccme.eu).

**Save the Date**  
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**October 18-19, 2019**  
**Renaissance Boston Waterfront Hotel**



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