

# Managing Change in Health Professions Education - Experiences from the Trenches

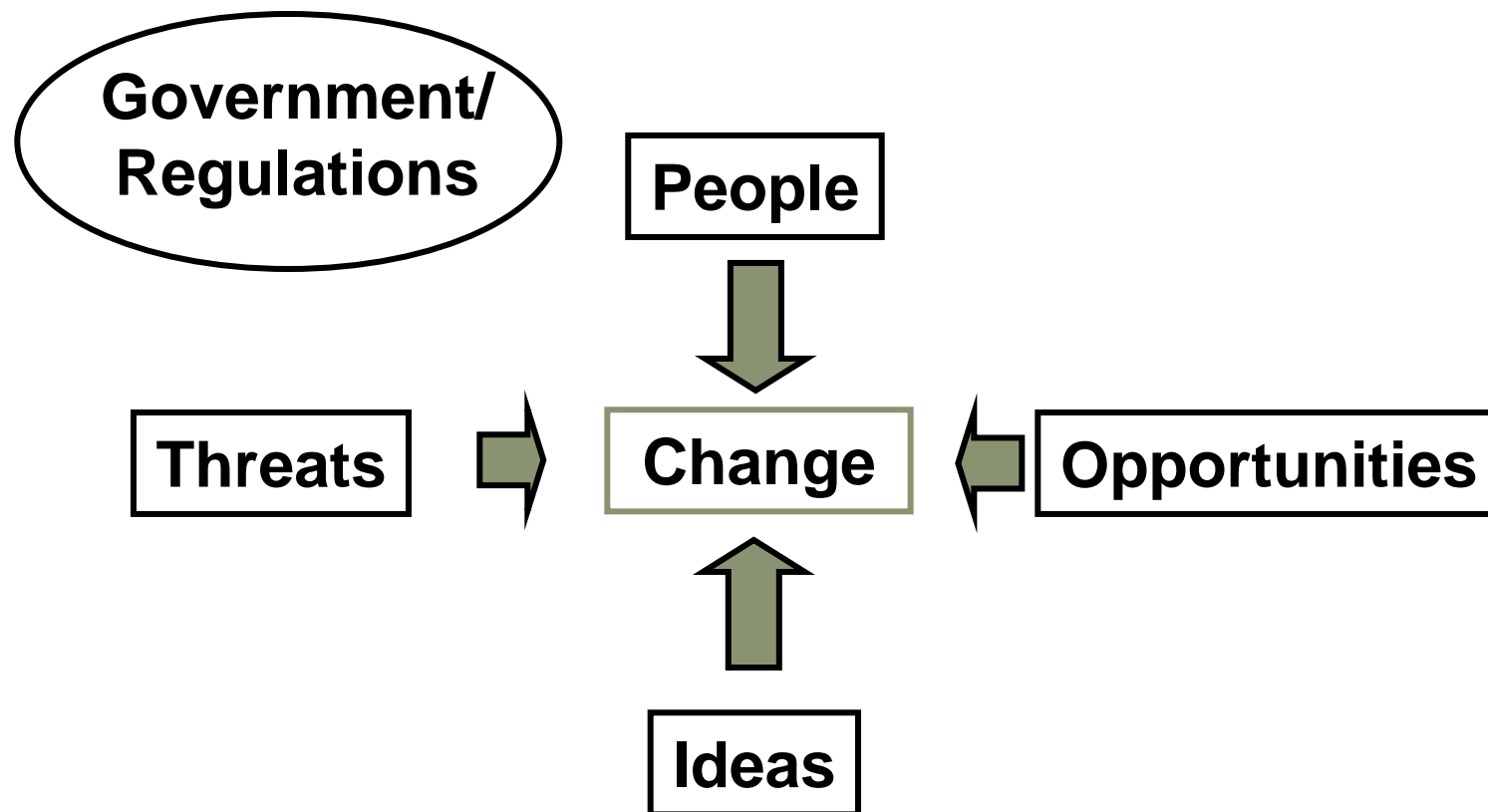
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Harvard Medical International  
June 21, 2007



HARVARD MEDICAL  
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# Drivers of change

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# Story 1

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You run into colleague in the hallway; she has recently been asked by the Dean to “get the new curriculum going”. After the usual small talk, she asks you “Would you mind co-chairing one of the planning groups for the new curriculum?”

Before you answer, you ask her three questions....

# Defining the four antecedent processes to change

## Chartering

The process by which the organization defines the initiative's purpose, its scope and the way people will work with one another on the program

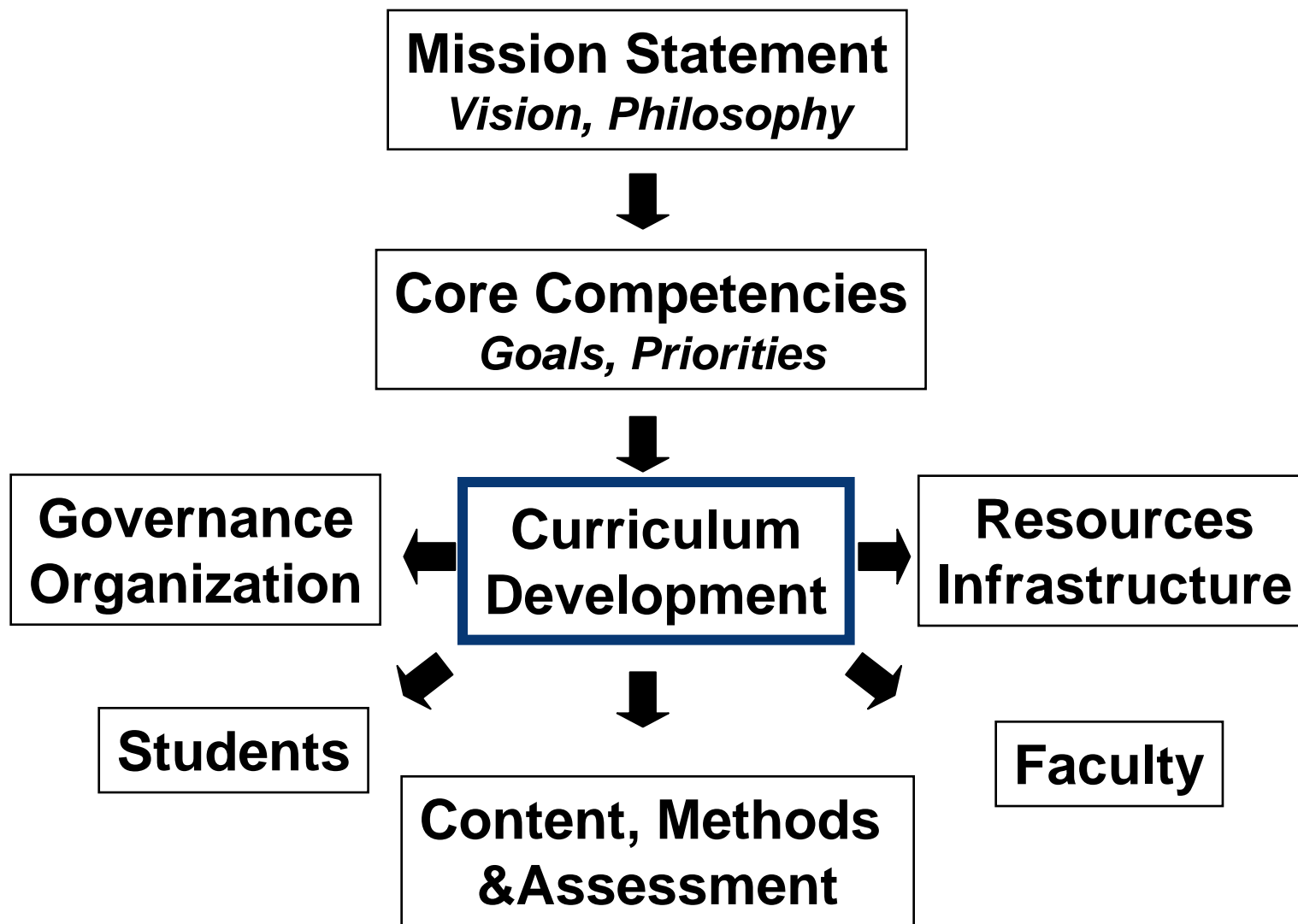
- Boundary setting – definition of scope of initiative
- Team designs – definition of roles, responsibilities, norms and ground rules for teamwork

# Conditions fostering effectiveness in group processes

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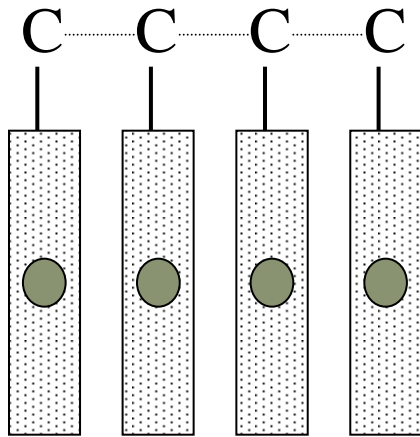
- Clear engaging directions
- Enabling performance situation
  - Facilitative group structure
    - *Well-structured group task*
    - *Well-composed group*
    - *Appropriate norms of behavior*
  - Supportive organizational context
    - *Reward system*
    - *Educational system*
    - *Information system*
  - Available expert coaching
- Adequate material resources

# Central role of curriculum development

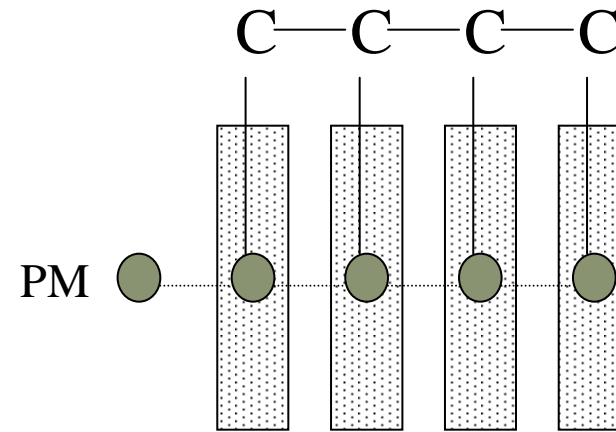


# Types of teams to do the task

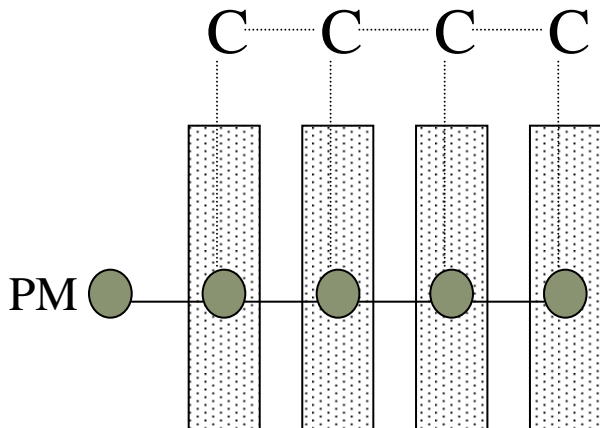
Functional team



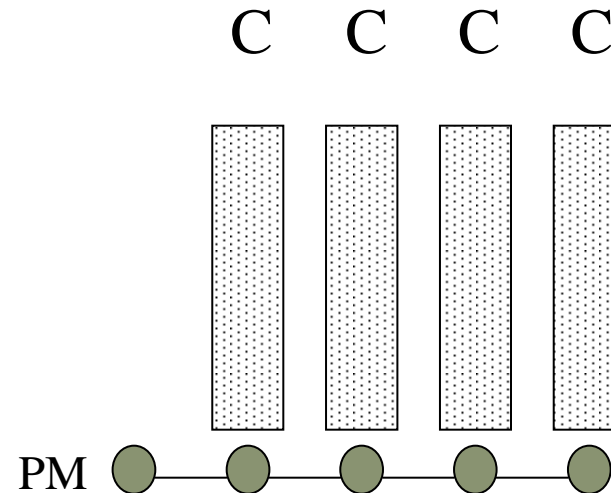
Light-weight team



Heavy-weight team



Autonomous team



# Selecting a process for decision making

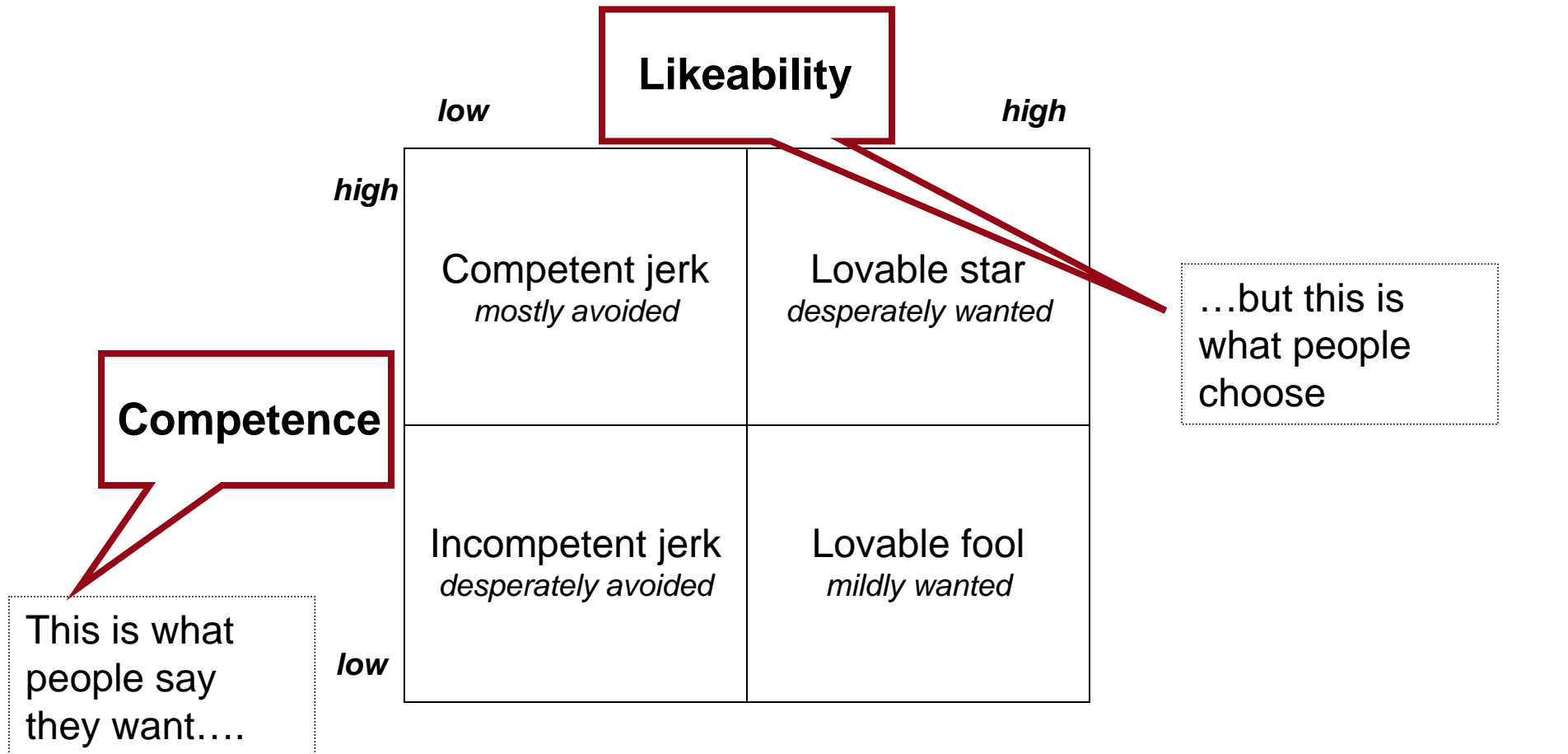
How critical is the concrete outcome?

How critical is it that there be agreement?

	<i>Low</i>	<i>High</i>
<i>Low</i>	Avoid or delegate	Give it to a committee to reach agreement
<i>High</i>	Decide where it can be done the best - outsource	Collaborative, conjoint problem solving



# Professional behavior influences communication, and thus quality – picking the team for the task



# Effective teamwork

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- Team's output meets external standards
- Team experience rewards its members
- Team experience enhances future collaboration and learning

## Story 2

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A large public health sciences school in Europe wants to change its curriculum but is not sure how and what it will take. An enthusiastic professor and course director approaches the Dean and asks “Can I be of help?”. The Dean thinks for awhile and says.....

# Defining the four antecedent processes to change

## Learning

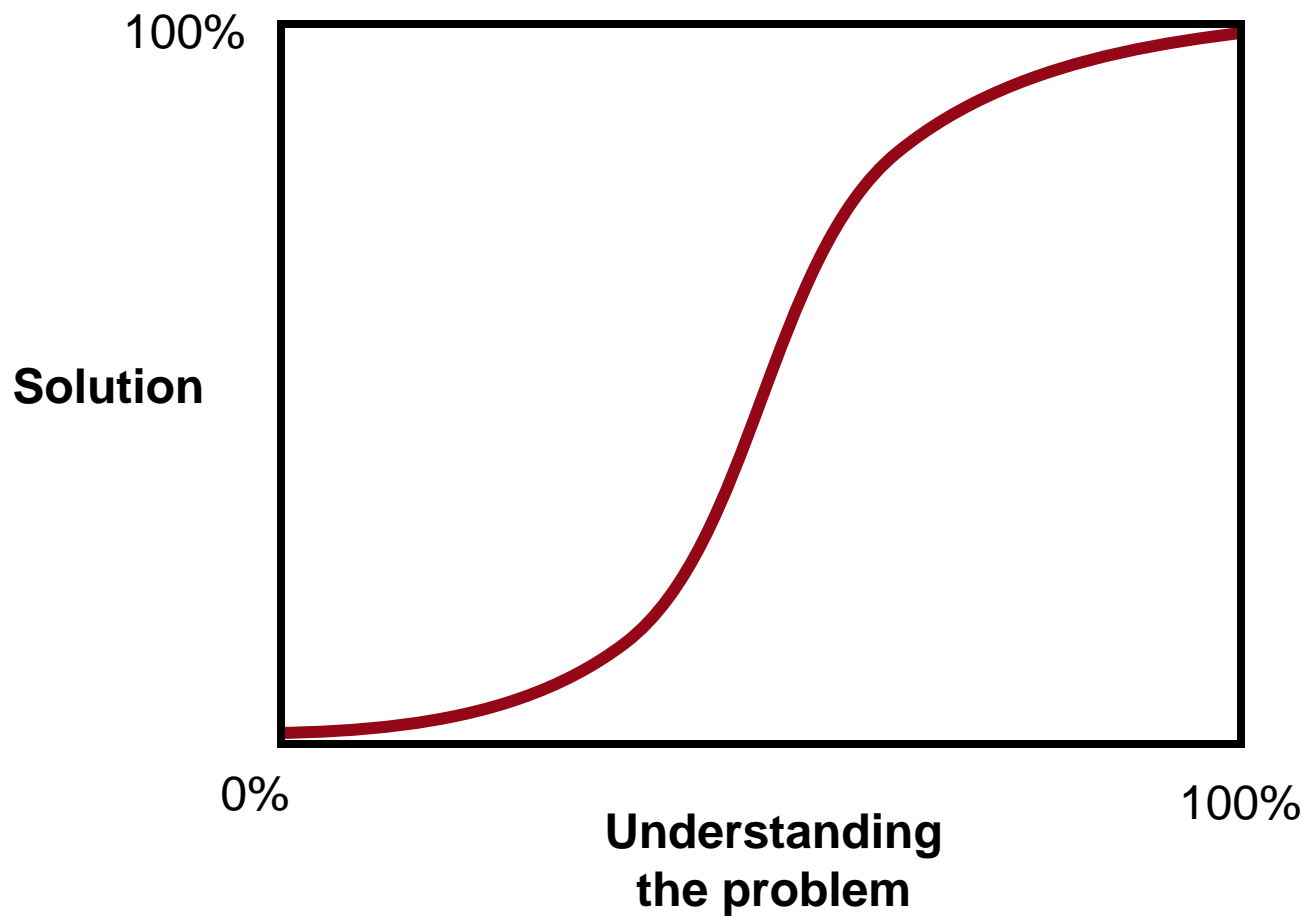
How to develop, test and refine ideas through experimentation before a full-scale rollout

- Discovery – data and information gathering to define goals of initiative and means of achieving objectives
- Experimentation – testing and refinement of initiative prior to full-scale rollout

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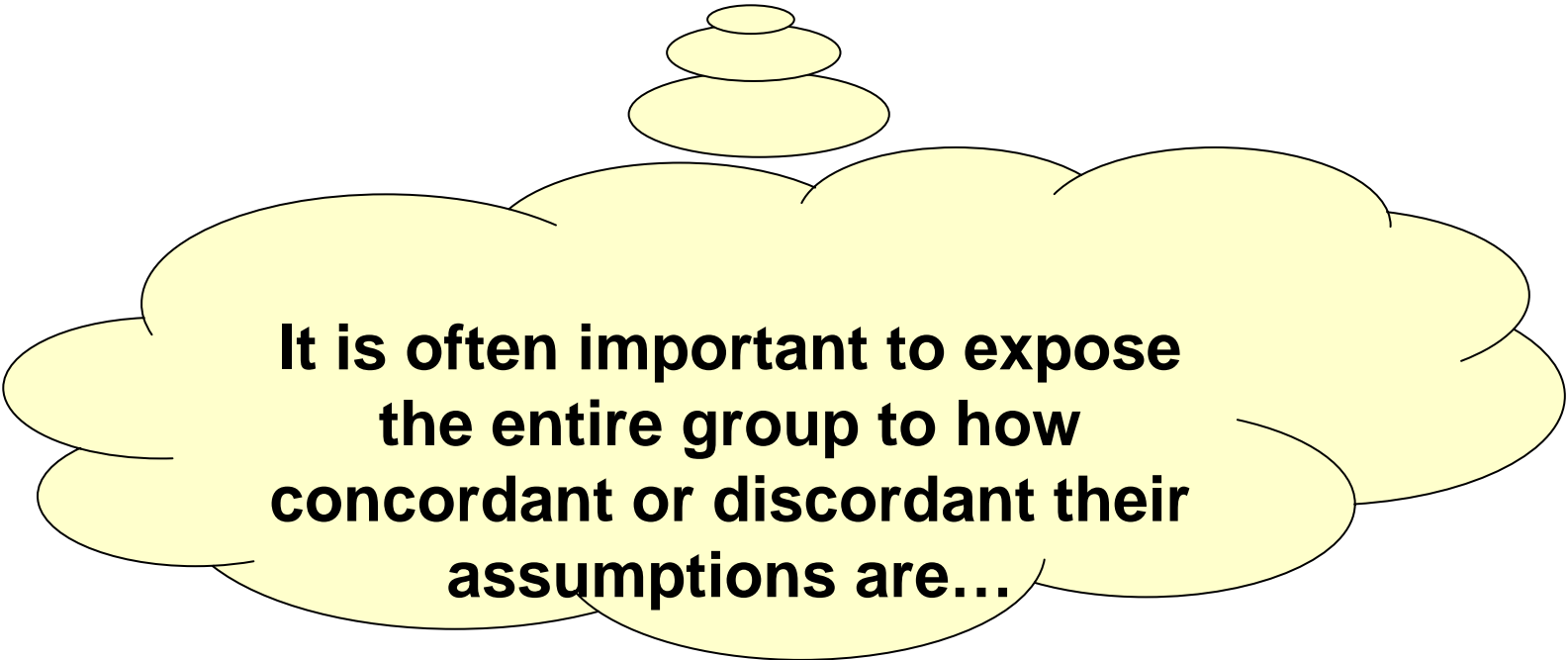
“Ignorance more frequently begets confidence than does knowledge”

*C. Darwin (1871)*



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... take time to understand the multiple perspectives in a group before launching into solution-finding and beware of PHOG...



**It is often important to expose the entire group to how concordant or discordant their assumptions are...**

## Story 3

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The new director of a major interdisciplinary course was preparing for his first meeting with the 15-person planning group, most of whom “outranked” him and all of whom had been on the planning group for several years. He had read all the relevant materials including a recent study showing that the objectives of the course did not meet all the expectations of courses that followed. He wonders how he should start the meeting....



# Defining the four antecedent processes to change

## **Mobilizing**

The use of symbolism, metaphors and compelling stories to engage hearts as well as minds in order to build commitment to the project

- Storytelling – use of stories and metaphors to create compelling accounts about need for initiative and explain specific changes
- Symbolic actions – use of symbols to reinforce credibility and legitimacy of the planning team and its message

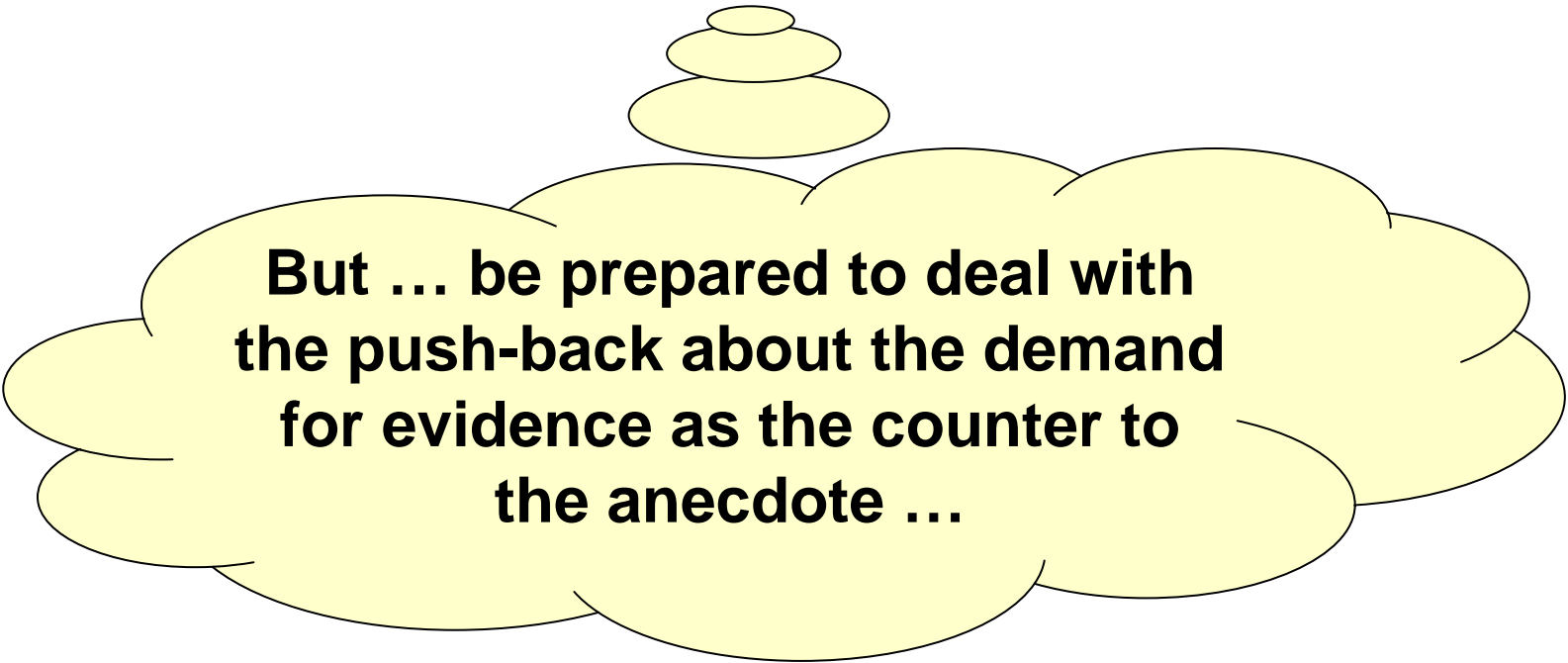
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“When executives need to persuade an audience, most try to build a case with facts, statistics, and some quotes from authorities. In other words, they resort to "company speak," the tools of rhetoric they have been trained to use...Robert McKee, the world's best-known screenwriting lecturer, argues that executives can engage people in a much deeper--and ultimately more convincing--way if they toss out their PowerPoint slides and memos and learn to tell good stories. As human beings, we make sense of our experiences through stories...”

*McKee R, Fryer B. Storytelling that moves People.  
HBR; June 2003*

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... don't be afraid to personalize stories relevant to the context ...



**But ... be prepared to deal with the push-back about the demand for evidence as the counter to the anecdote ...**

## Story 4

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A newly appointed Dean begins the process of consultation with each academic unit to launch a new curriculum planning process

At an early meeting with a basic science department, the department head proceeds to announce that “the Dean is here to share her thoughts about planning for a new curriculum”

A loud interjection from the floor ensues ...

# Defining the four antecedent processes to change

## Realigning

A series of activities aimed at reshaping the organizational context, including a redefinition of the roles and reporting relationships as well as new approaches to monitoring, measuring and rewards

- Job redesign – alteration of underlying structure and process to support jobs
- Performance management – invention of new metrics to measure effectiveness of initiative and incorporation of the metric into employee performance appraisal process

# What is culture?

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Culture is “the deeply embedded patterns of organizational behavior and the shared values, assumptions, beliefs, or ideologies that members have about their organizations or its work”

Source: Petersen and Spencer

Culture is “Obedience to the Unenforceable”

*“It is a realm in which not law, not caprice, but virtues such as duty, fairness, judgment, ... hold sway. In a word, it ... covers all cases of right doing where there is no one to make you do it but yourself.”*

John Fletcher Moulton

# Bergquist's framework of culture

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- **Collegial culture**

- Arises from disciplines of faculty. It values scholarship, shared governance and decision making, and rationality

- **Managerial culture**

- Focuses on goals and purposes of the organization. It values efficiency, effective supervisory skills and fiscal responsibility

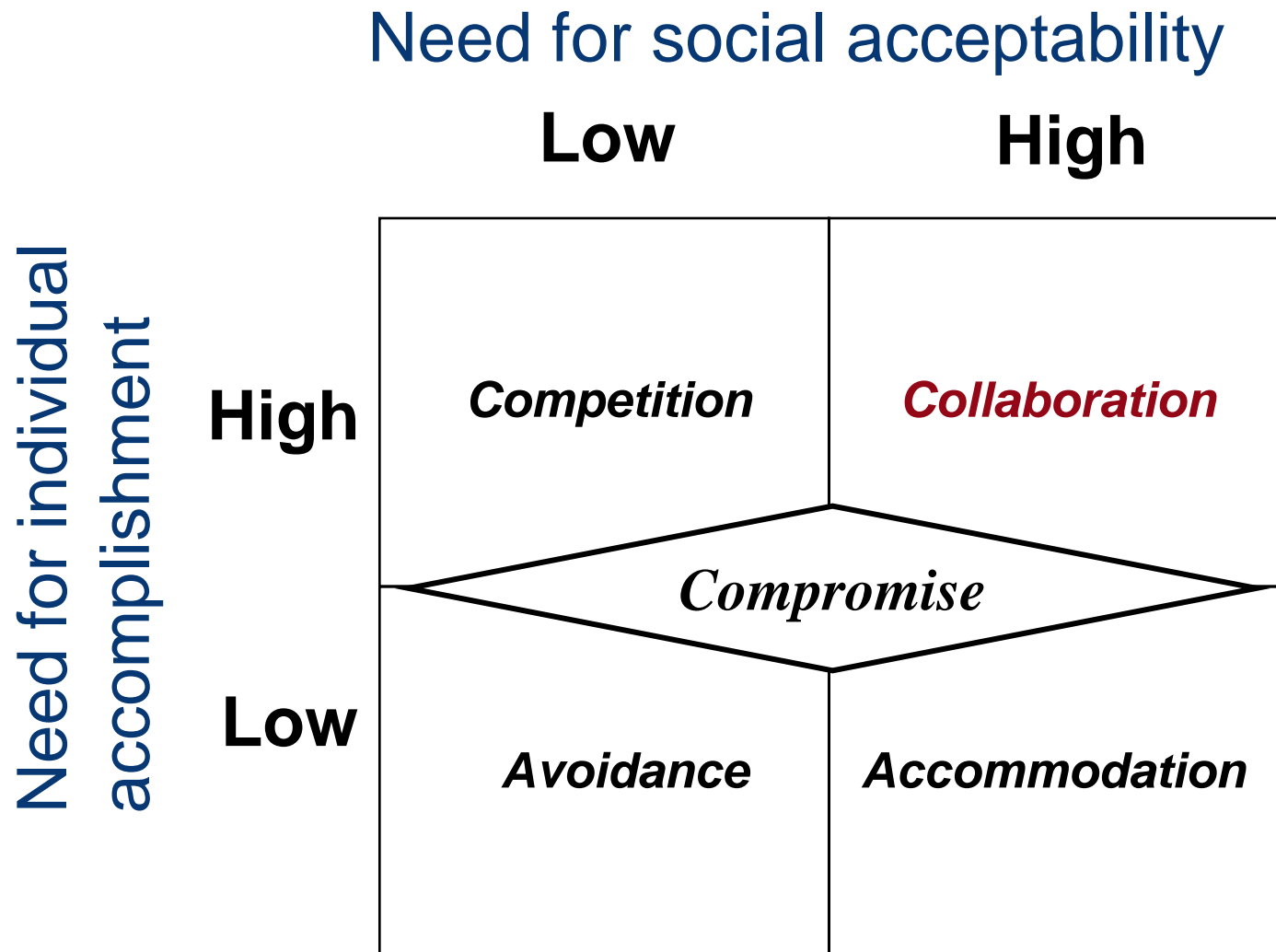
- **Developmental culture**

- Based on personal and professional growth of all members in a collegial environment

- **Negotiating culture**

- Values equitable policies and procedures, confrontation, interest groups, negotiation and power

# Organizational dynamics and culture





# Core Elements of Organizations

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After Mintzberg H  
Courtesy: B. Dowton

# Metaphors for Organizations

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- Machines
- Organisms
- Brains
- Cultures
- Political Systems
- Psychic Prisons

# Four combinations of complexity and change

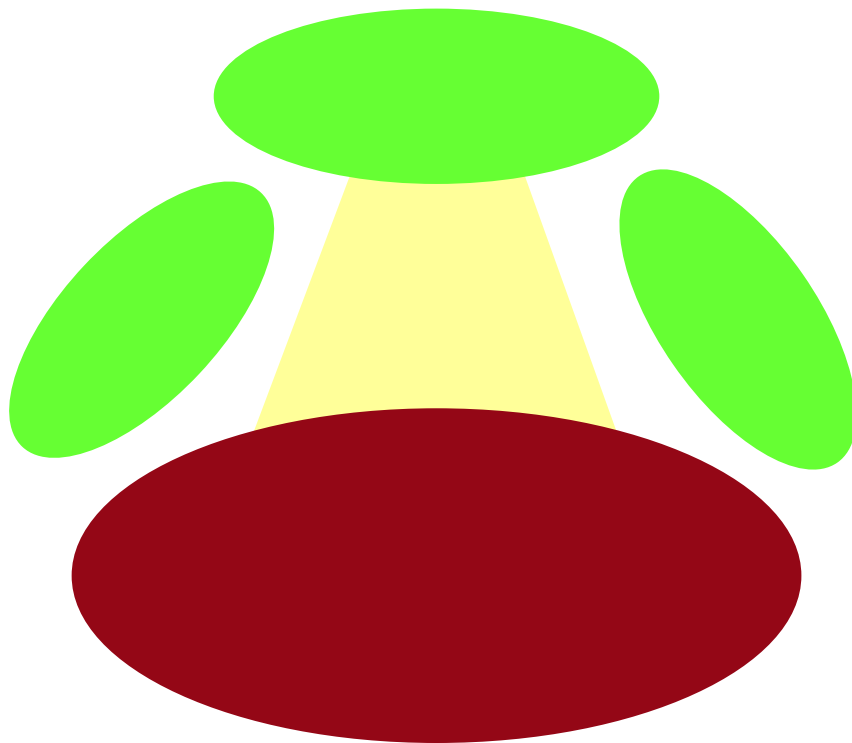
	<b>SIMPLE</b>	<b>COMPLEX</b>
<b>STABLE</b>	<p><b>MACHINE BUREAUCRACY</b></p> <p>(Standardized work processes and outputs)</p>	<p><b>PROFESSIONAL ORGANIZATION</b></p> <p>(Standardized skills and norms)</p>
<b>DYNAMIC</b>	<p><b>ENTREPRENEURIAL STARTUP</b></p> <p>(Direct supervision)</p>	<p><b>ADHOCRACY</b></p> <p>(Mutual Adjustment)</p>

(= coordination mechanism)

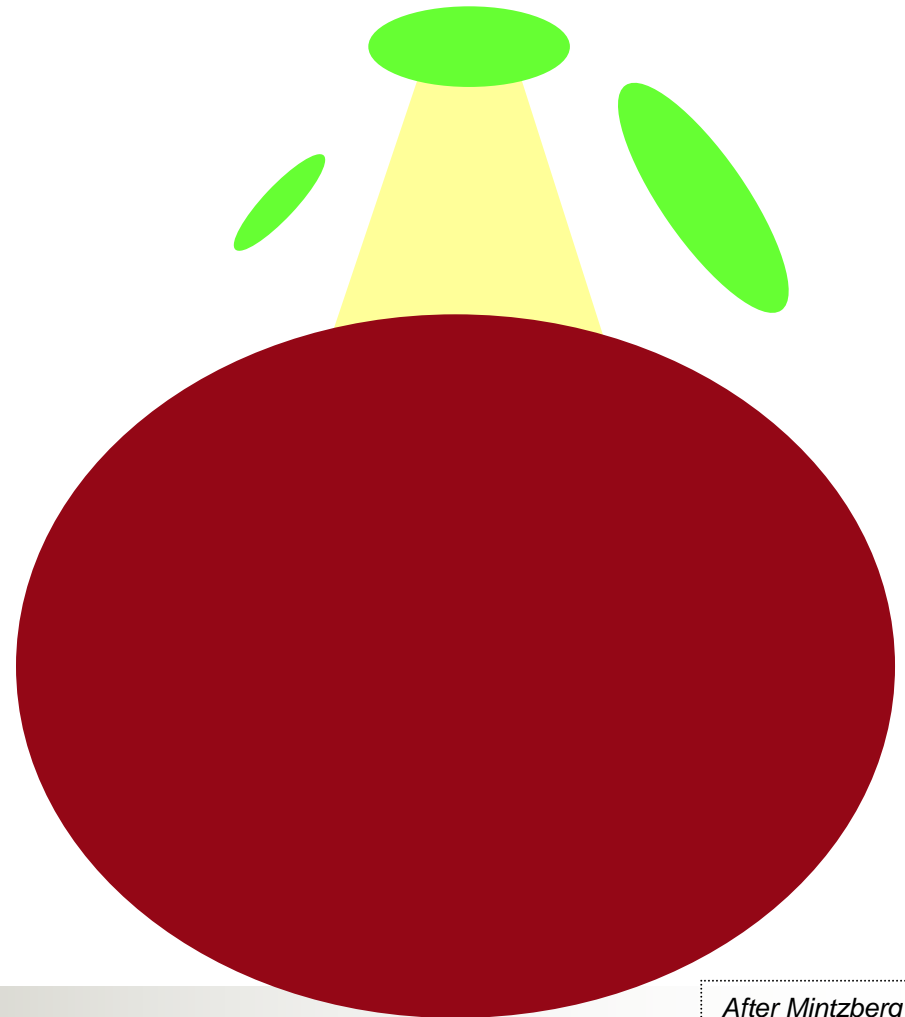
# Depending on their task organizations – or some of their parts look different

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## MACHINE BUREAUCRACY

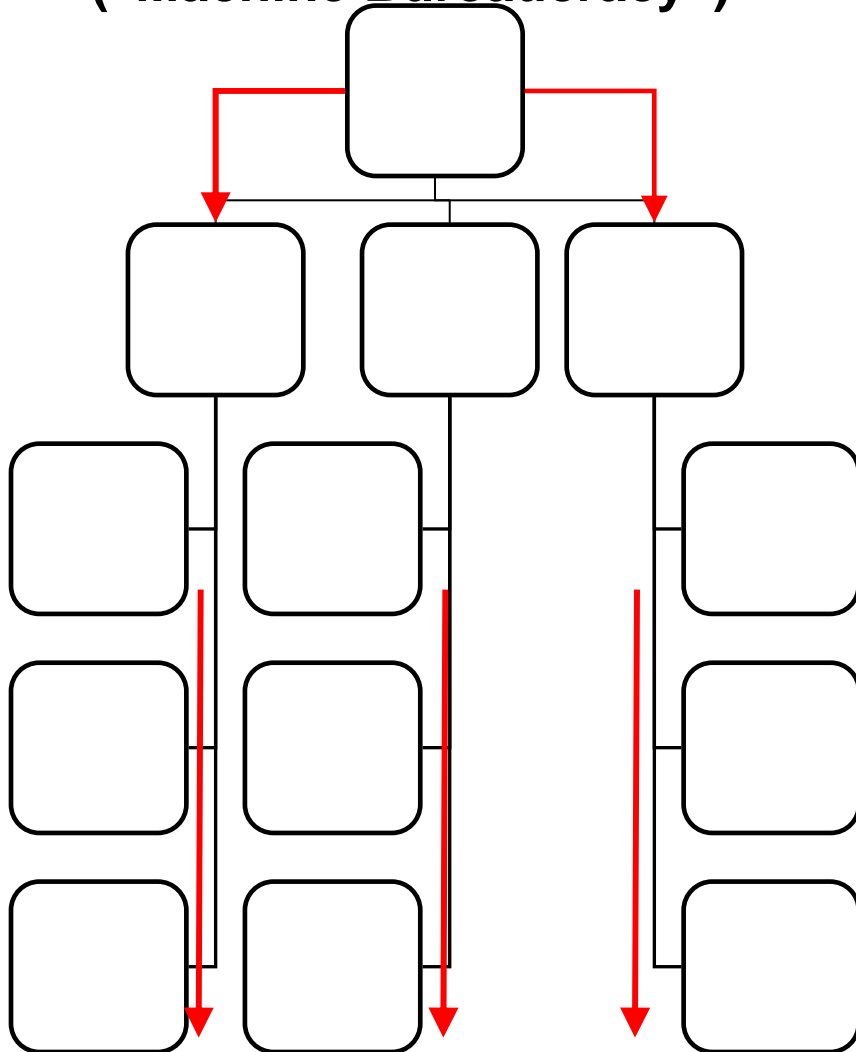


## PROFESSIONAL ORGANIZATION

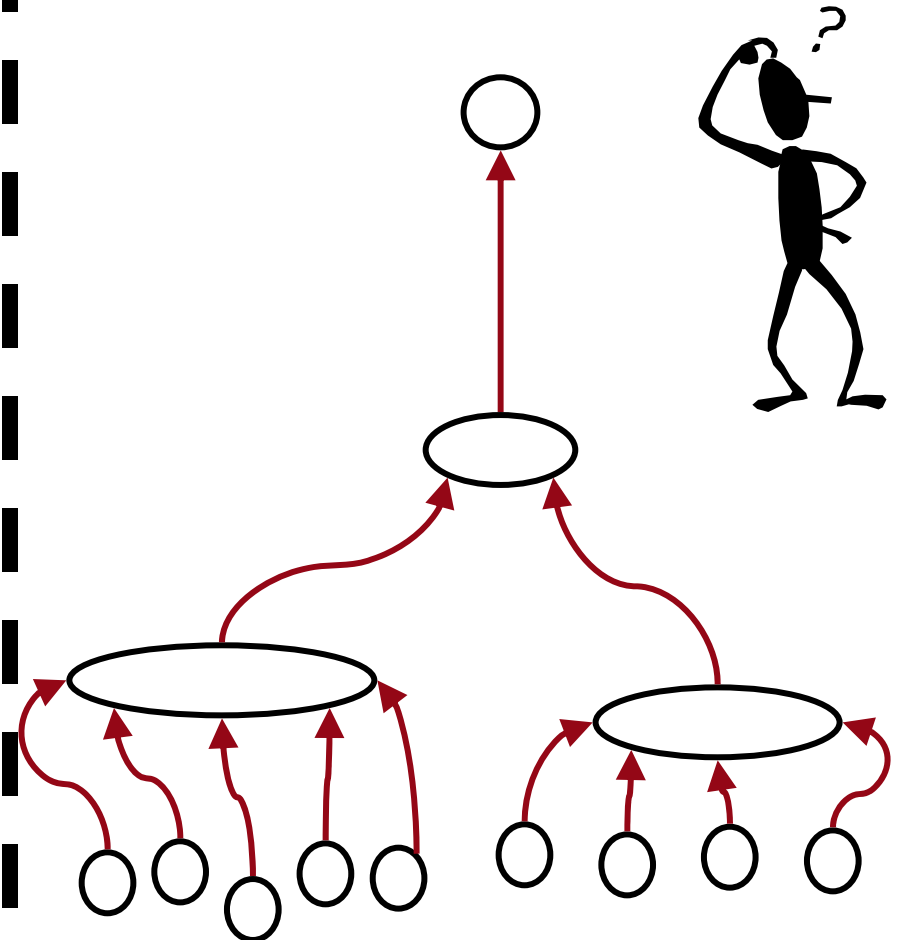


# The professional – administrative divide

## ADMINISTRATION & COMPLIANCE ("Machine Bureaucracy")

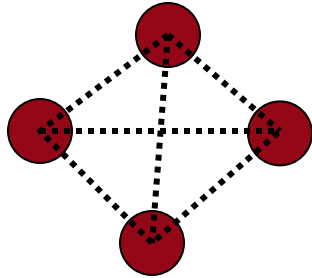


## ACADEMIC ORIENTATION ("Professional Organization")

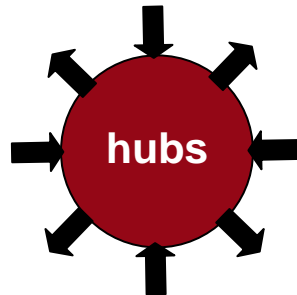


# Organizational Structures to Fit the Tasks

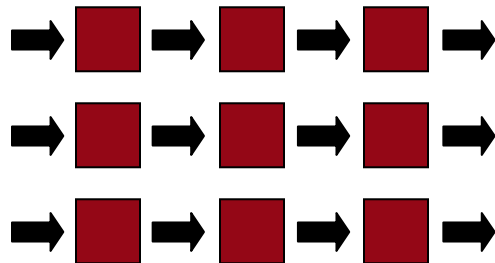
networks



Complex problem solving  
and customized delivery



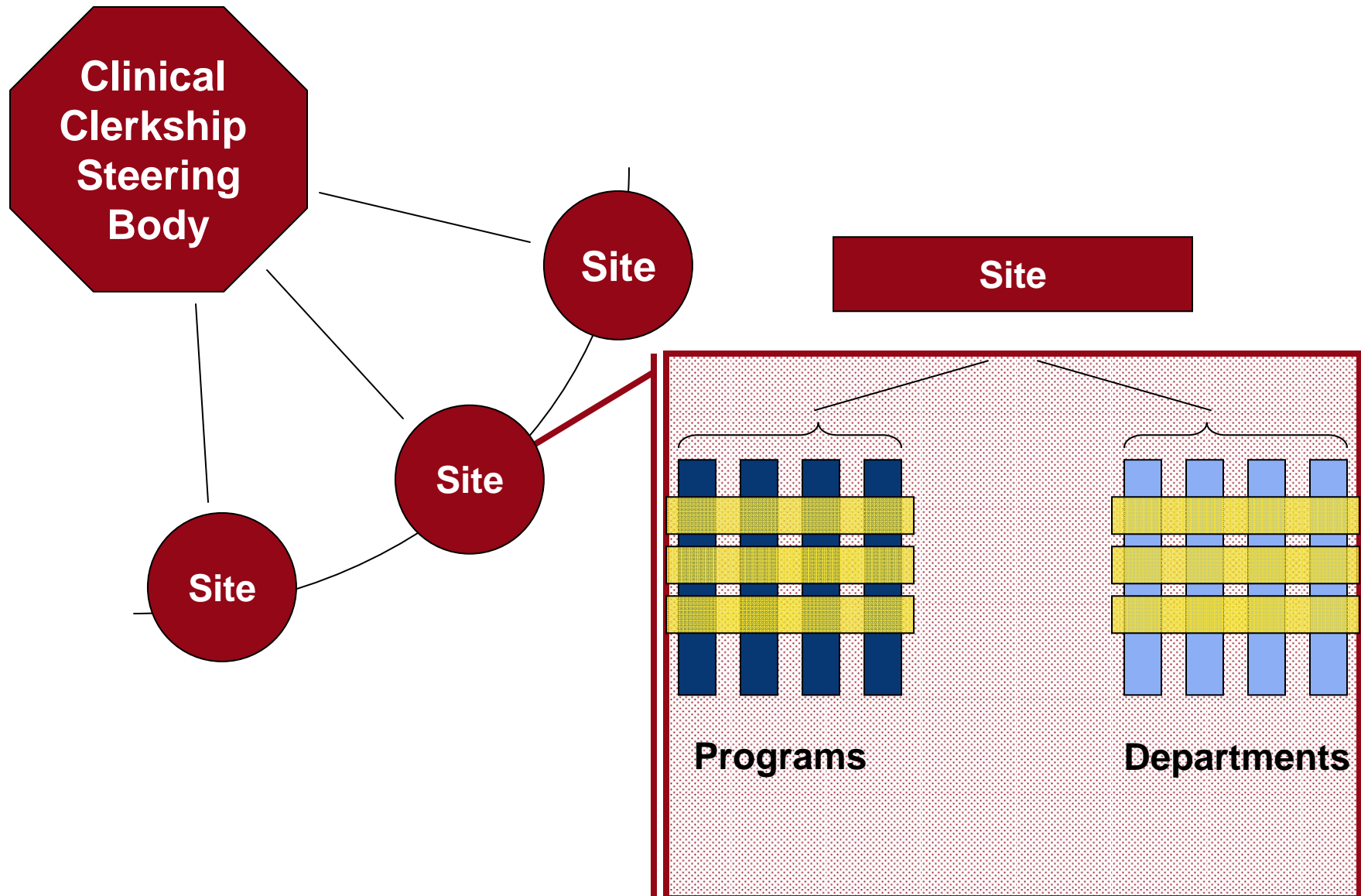
Coordination and evaluation



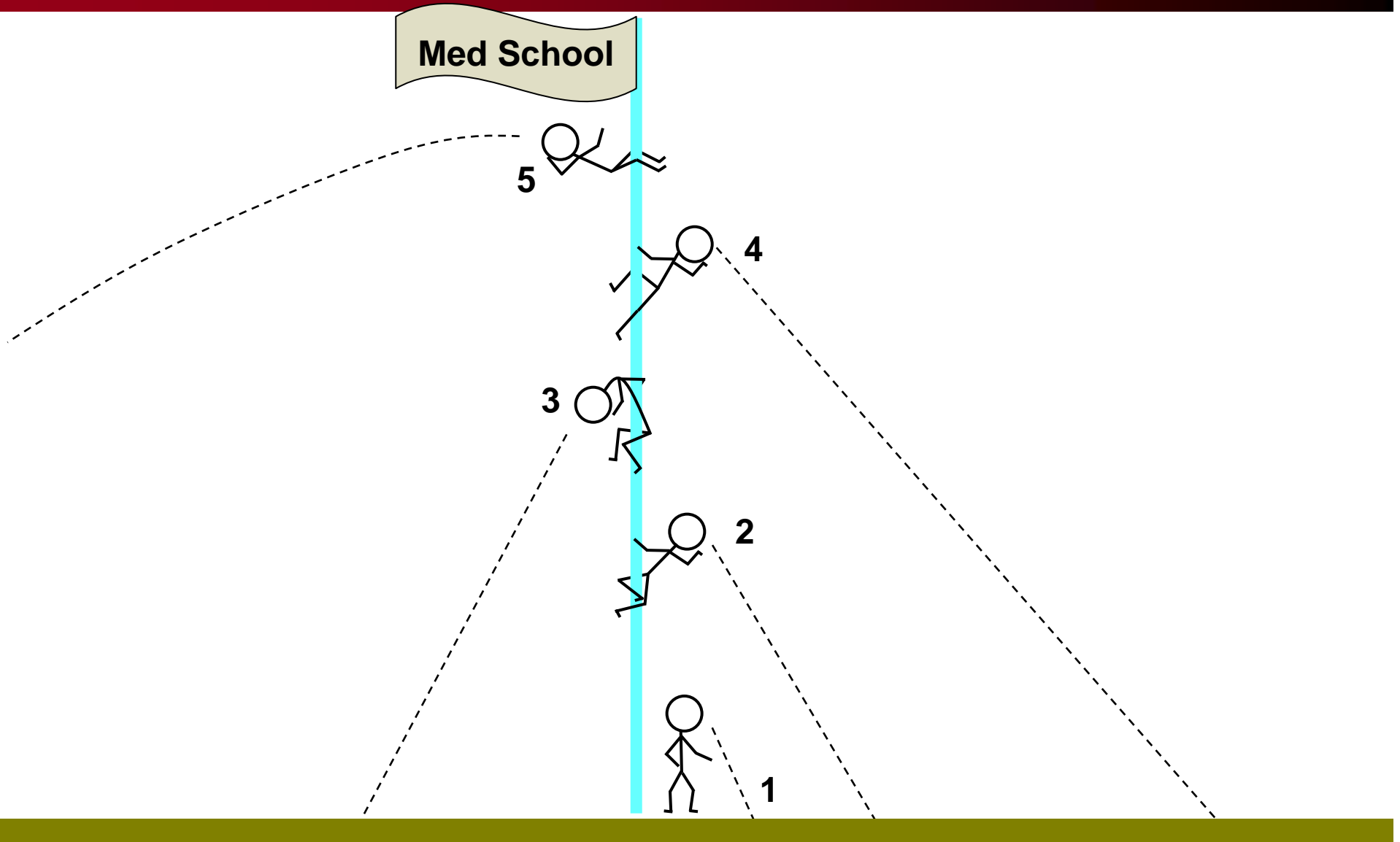
Creation of rules and  
dissemination of support

chains

# Example: A clinical clerkship model



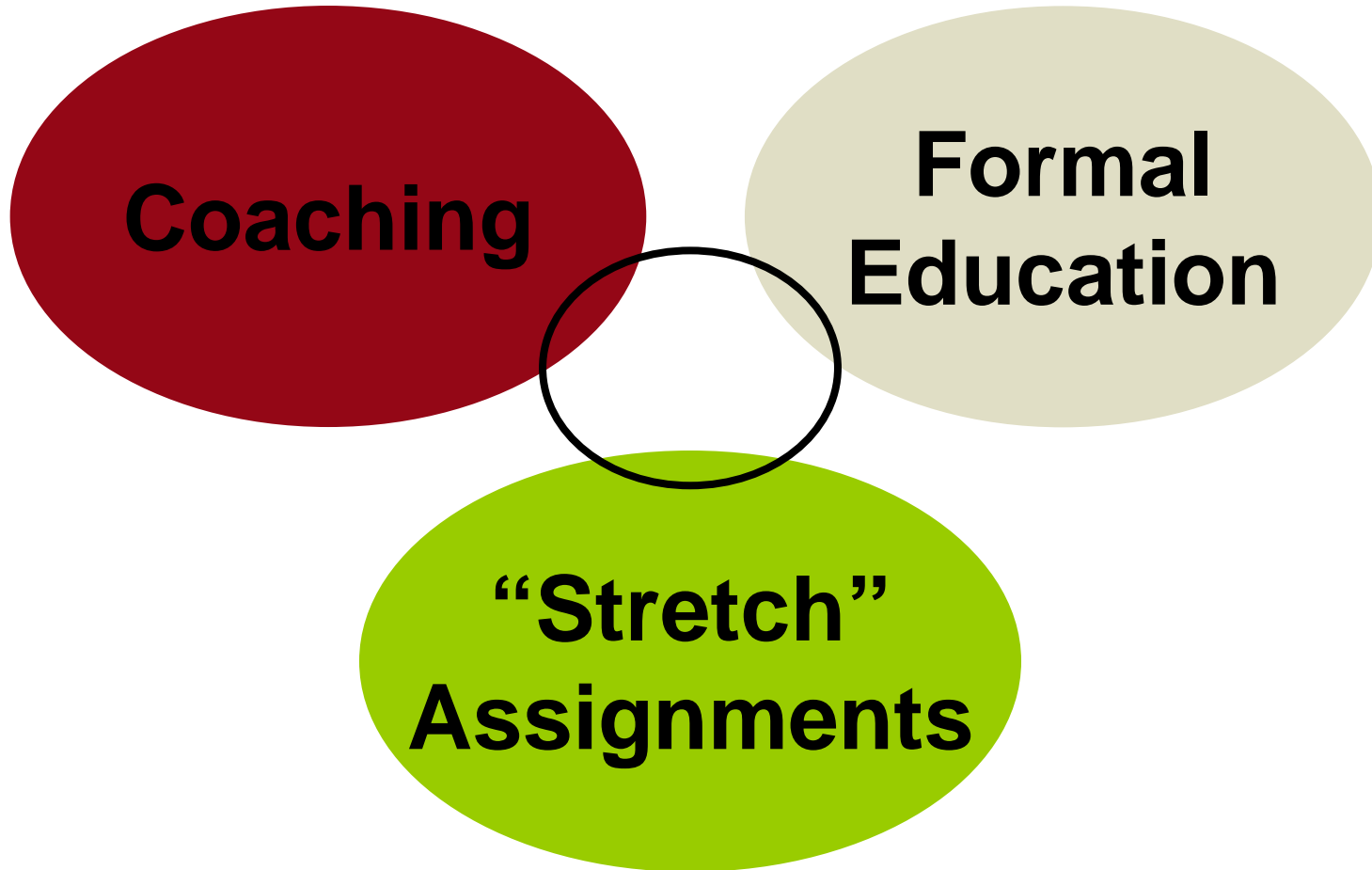
# Your position determines what you see





# How Professionals Learn

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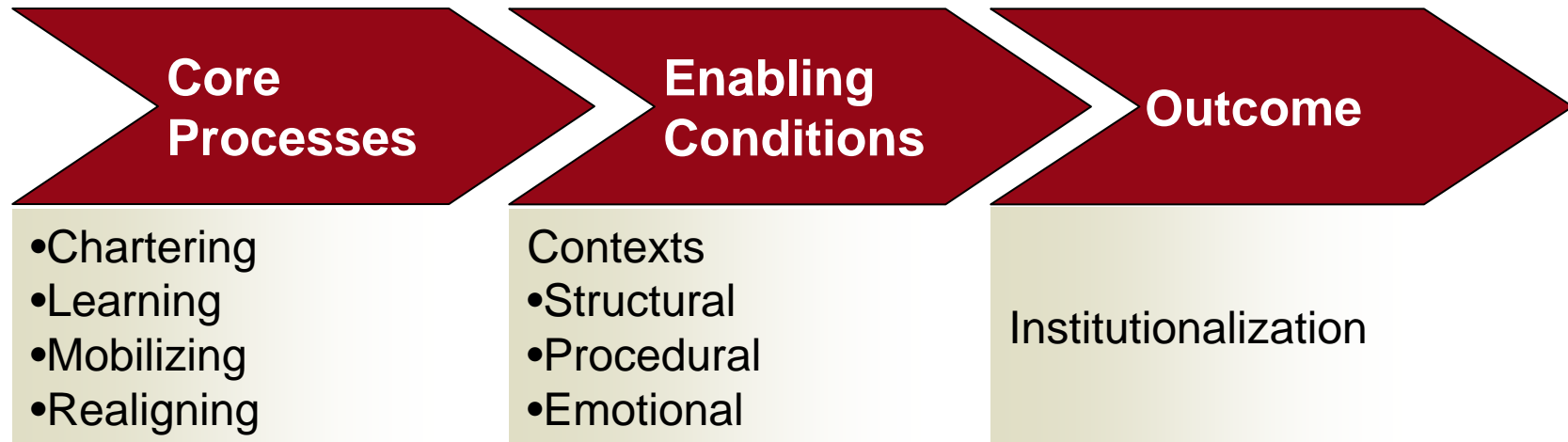


# When do professionals create maximal value?

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- When given new challenging assignments
- When they get to do what they do best
- When their personal morale is high
- When accompanied by a junior person to coach
- When irritations and distractions are minimal
- In a non-hierarchical environment

# Laying the foundation for enduring change



# Survival Guide for Change Agents

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- Make the case and create pressure for change- threat or opportunity, fear or greed
- Have a vision for change, articulate it simply
- Form power coalitions
  - analyze the power structure
  - be prepared to negotiate parts of your vision away
  - gain power by sharing it
- Scope the work effort and develop a plan
  - barriers and facilitators- force field analysis
  - organization/structure
  - deliverables
  - timetable
  - chunking the work
  - resources

# Survival Guide for Change Agents

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- Build a team
- Manage the process
  - Set priorities
  - Run good meetings
  - Manage conflict
  - When more deliberation is asked for -- don't
    - do it, fix it
    - 80% solutions
    - The perfect is the enemy of the good
- Prematurely declare success but use it to set next objectives/tasks
- Take your job seriously, not yourself