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Leading Change

In Medical Education

Developing Medical Educators for the 21st Century

Brian S. Schwartz, M.D. Professor, Division of Infectious Diseases

Kevin H. Souza, M.S. Associate Dean for Medical Education

University of California San Francisco

| Time | Activity | Method |
|-------------|----------------------------|-------------------|
| 5 min | Readiness to Learn | Group Preparation |
| 30 min | Review of Change Models | Point to Point |
| 30 min | Change Teams Activity | Team Simulation |
| 25 min | Change Teams Reports | Report/Discussion |
| 15 min | Video and Workshop Wrap-Up | Discussion |

Agenda



- Understand the definition of change management.
- Describe Kotter's 8 stages of change.
- Apply Kotter's model to a change initiative.
- **Leave remembering that deliberate change management is worth thinking about.**

Objectives



We have no conflict of interest relevant
to the presentations and workshop we
offer today

Disclosures



@kevinhsouza | @BSchwartzinSF

Developing Medical Educators for the 21st Century

The proposed solution
to a long standing
drought in your village
is to travel the Deep
Dark Forest to a new
home.



<https://www.flickr.com/photos/joansorolla/20167582842>



A process for transitioning
individuals, teams,
and organizations
to a desired future state.

- John Kotter

Change Management





Change by the Numbers



2011

2012

2018

Medical student microbiology course director

What I found?

- Society unaware of value of Med Ed or needs of clinician educator
- ID Med Ed colleagues with similar challenges

- IDSA Med Ed Community
- Med Ed sessions at conference
- Struggling for support

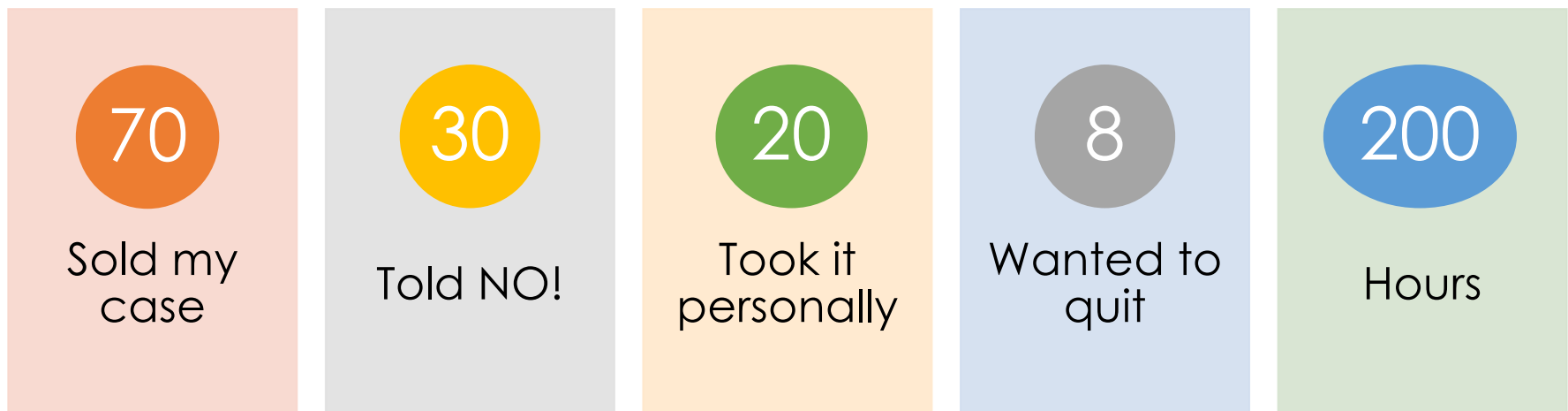
Search for ID Med Ed Community – Infectious Diseases Society of America?

Building an ID Med Ed Community



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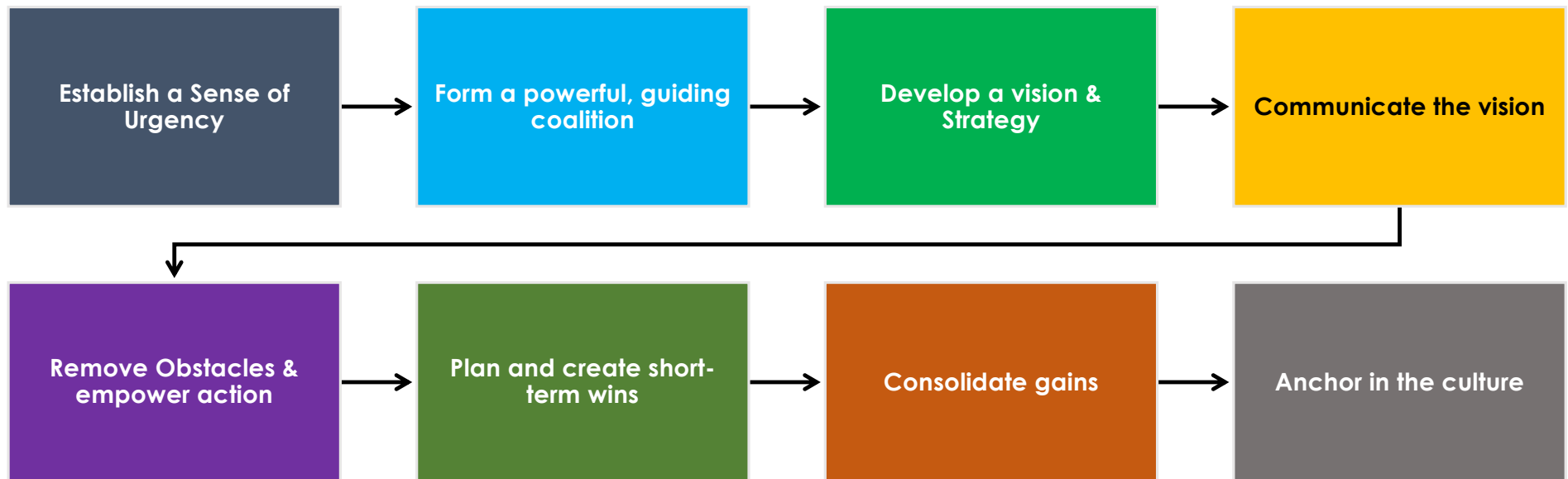


Change by the Numbers

- John Kotter's 8 Stages of Change
- Rogers Technology Adoption Curve
- Kubler- Ross Five Stage Model
- William Bridges Transition Model
- Gisela Wending's Liminal Pathway

Models





Kotter's 8 Stages of Change

1. Each table is a Change Management Team.
2. You have been charged by senior leadership to implement a large scale change.
3. Outline a change strategy using the first three stages of John Kotter's model.



Group Activity Instructions



For two consecutive years, burn-out scores have been very high among faculty and staff. To address this issue the Chancellor has decided to limit individuals' access to email.



Your team is charged to design a change management plan for this project. Outline your plan for the first three stages of Kotter's Model and be prepared to discuss with the group.



Email Embargo Project

Describe how your team will approach leading this change.



Debrief



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Developing Medical Educators for the 21st Century



Bridging Transitions

LJ Moore

Student Assessment Coordinator
UCSF School of Medicine



@kevinhsouza | @BSchwartzinSF

Developing Medical Educators for the 21st Century





Meeting in the Middle

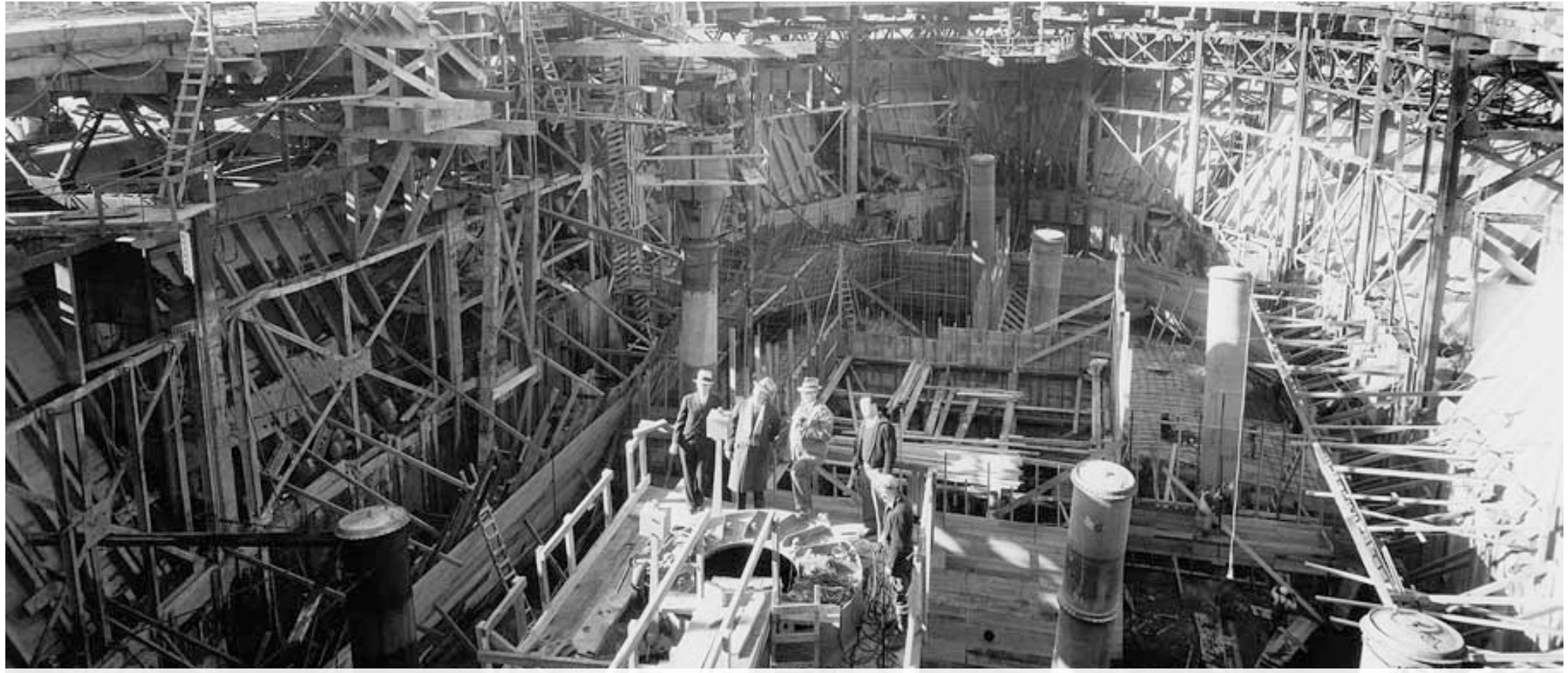


Working in Teams



Trust





The Work Can Be Incredibly Complicated





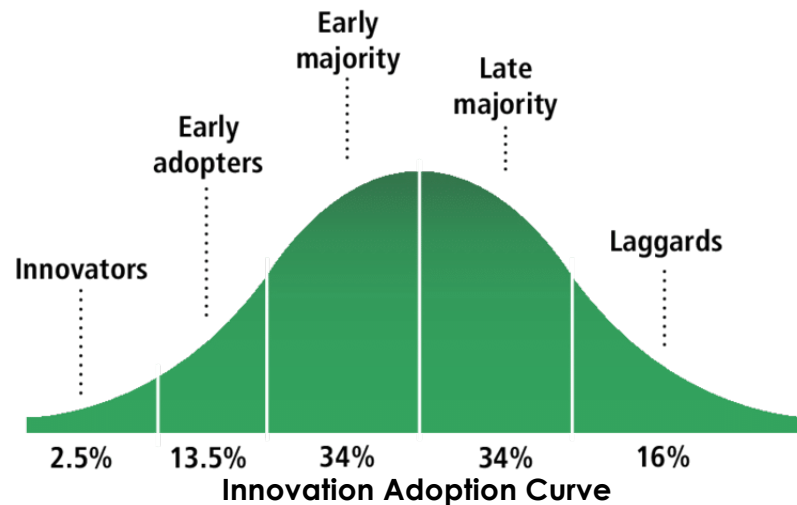
Continuous Problem Solving

**Temporary
Structures Not
Part of the
Final Vision**



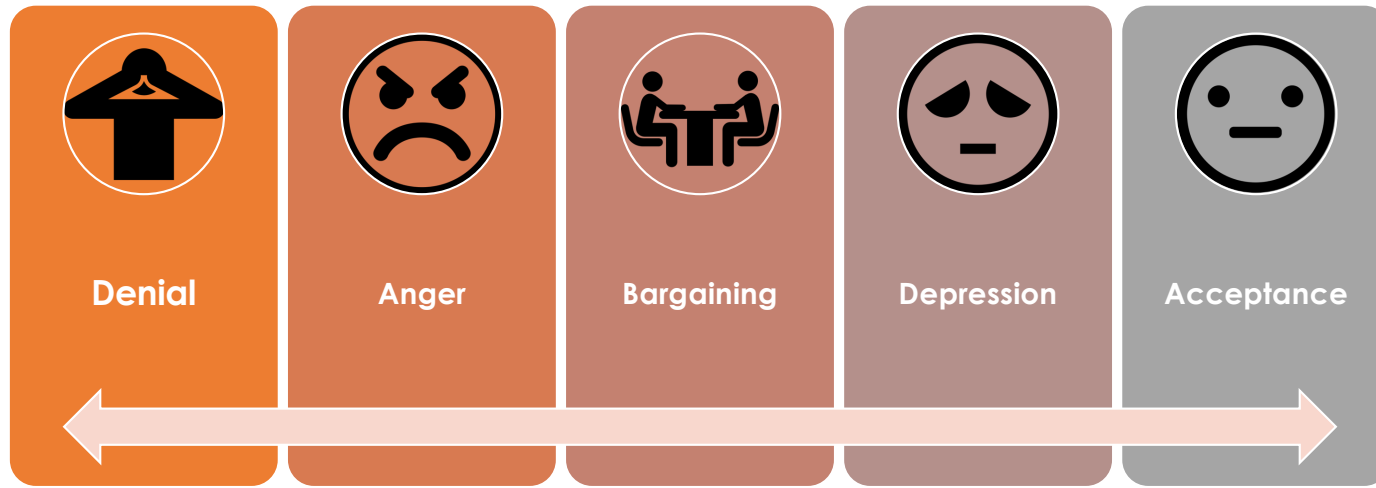


The Transition
is not the
Destination



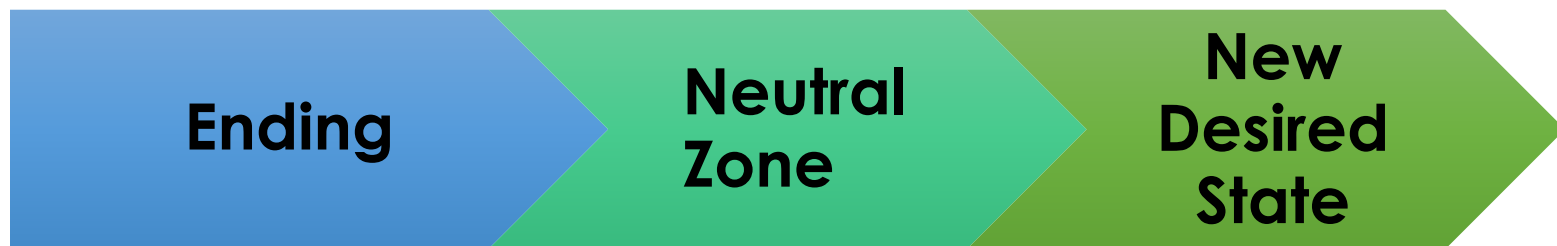
| Benefits | Limitations |
|--|--|
| Defines different sectors of stakeholders so you can better leverage innovators and early adopters and focus strategies on the late majority and laggards. | People shift between these categories depending on the change or its complexity. These can be hard to predict and often are visible only in hindsight. |

Rogers Technology Adoption Model



| Benefits | Limitations |
|---|---|
| <p>Focuses on how people react to change and helps leadership develop appropriate communication strategies.</p> | <p>The model assumes that the change is bad and it will be met with the worse reaction. It is difficult to identify transitions between these stages and they may not occur in order.</p> |

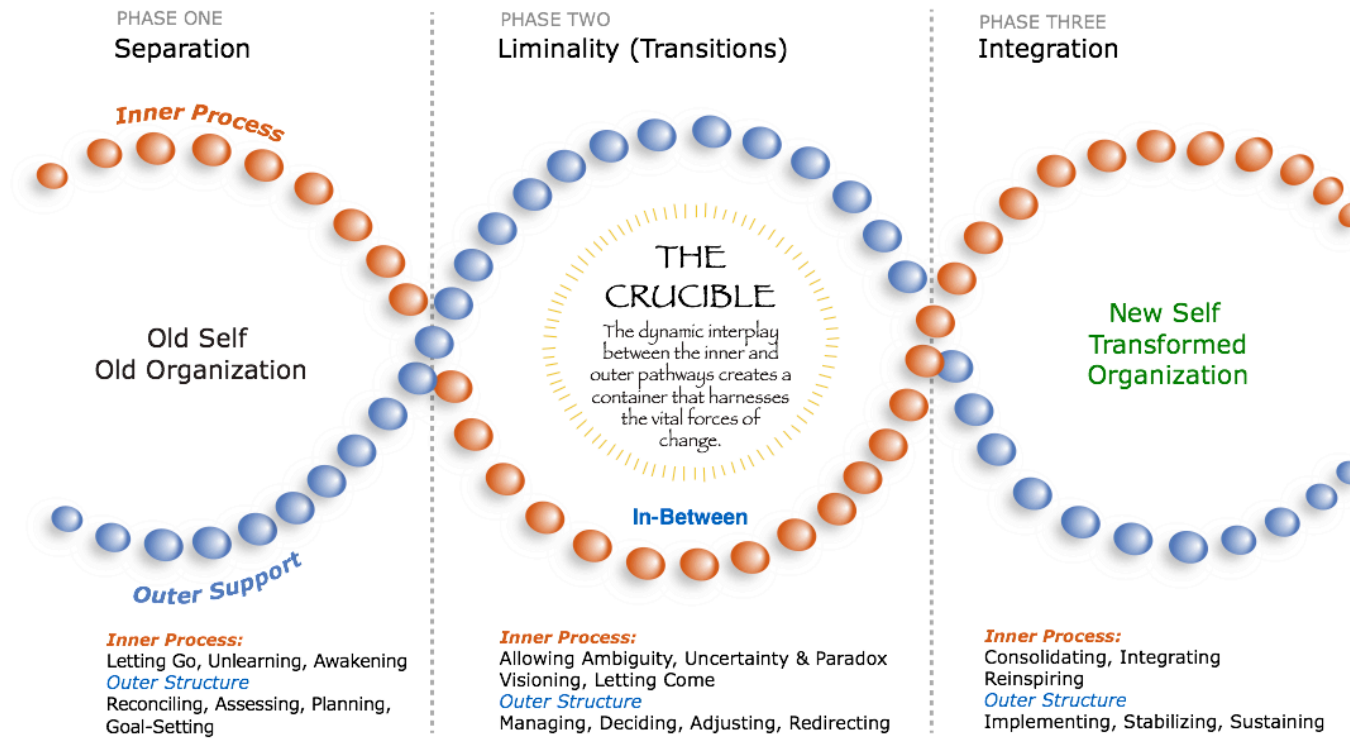
Kubler-Ross Five Stage Model



| Benefits | Limitations |
|--|---|
| Focuses on how people feel as you guide them through change. It clarifies the psychological effects of change. | Does not stand alone as a change management model and should be used along with a procedural model. |

William Bridges Transition Model





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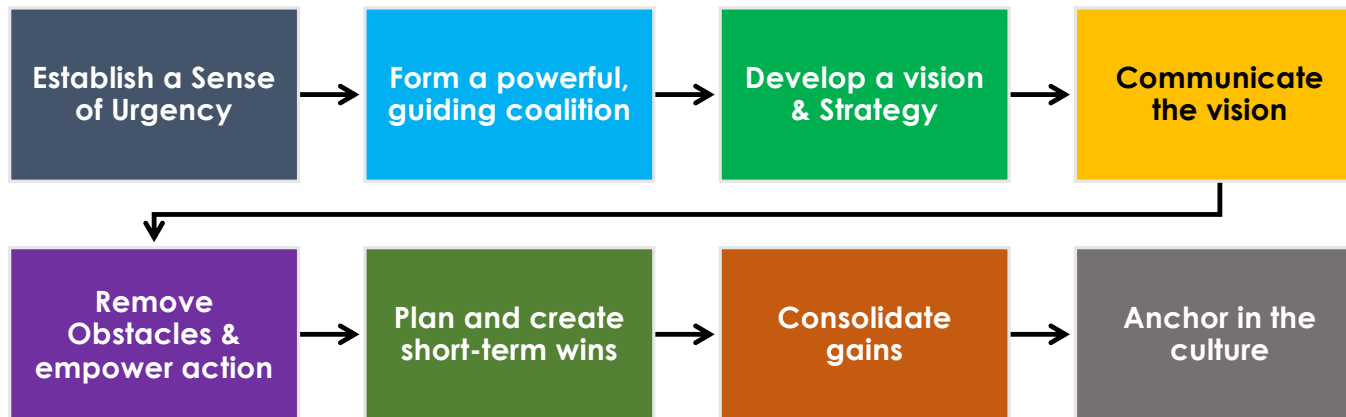
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Liminal Pathways



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Developing Medical Educators for the 21st Century



| Benefits | Limitations |
|--|--|
| <ol style="list-style-type: none"> 1. Clear steps which can give a guidance for the process 2. Fits well into the culture of classical hierarchies like universities | <ol style="list-style-type: none"> 1. Top-down, limits co-creation or other forms of true participation. 2. Frustrated stakeholders if the way people feel and transition through change is ignored. |

Kotter's 8 Stages of Change



Change Management

Scenario

For six months, senior academic and IT leaders at a large state college have been evaluating the institution's LMS, which was initially implemented more than a decade ago. Because of rising costs to maintain the existing system and complaints that it doesn't support cutting-edge applications, the leadership team has decided to transition to a new LMS. A dedicated project manager has been hired to oversee the technical aspects of the transition, but the team is also concerned about the "soft" side, the cultural dynamic of replacing a system that is central to how most faculty and students conduct academic activities. More than 80 percent of the college's courses use the existing LMS, and it also supports several successful, entirely online programs with large enrollments. Moreover, the current system has two vocal groups of ardent supporters: faculty who have invested considerable time incorporating the system's advanced features into their teaching, and faculty who only use the LMS for the class roster, syllabus, and grades and see no value in learning how to use those tools in a different system.

Officials involved in the LMS transition establish a change management group, led jointly by an IT director and a representative of the provost's office. The group includes several members of the faculty (both early and late adopters), students from various disciplines, and two members of the college's administrative staff. They adopt a change management framework that has proven effective at other colleges and universities.

The group knows that the move to the new LMS might be polarizing for the campus community, and they target their efforts at awareness and education, not only among the detractors but also for the project's champions, some of whom appear to have unrealistic expectations about how quickly the new system will be online. They coordinate the timing of their efforts with the project manager's schedule, and they use the college's social networking and other online vehicles to spread the word, answer questions, set expectations, and build trust. The group arranges for live demos of the new system—again, for the eager and the reluctant. The combination of the framework they selected and the familiarity among the group with the college's history and culture puts the group in a good position to help this difficult transition succeed.

1 What is it?

"Change management" refers to the business practices and procedures that address the human and cultural aspects of organizational change. Whereas project management attends to the technical, logistical, and financial facets of initiatives, change management attempts to facilitate a smooth transition by building awareness and understanding among those who will be affected by the changes. In higher education, changes such as a curriculum redesign or campus-wide deployment of new technologies might be seen as unnecessary or not worth the effort, and the campus community might not understand the impacts the change has on other areas. By establishing a set of processes designed to ensure a common understanding of the end goal and the steps to achieve it, change management can cultivate awareness, understanding, and support as it helps people adapt to and deal with change. Technology has certainly contributed to the frequency and impact of changes in higher education, but technology tools can also play an important role in effectively managing those changes.

2 How does it work?

Change management runs concurrently with the programmatic change that it complements, such as the introduction of competency-based learning or the launch of an online degree program. The process can range from a relatively informal approach to a highly structured framework such as those put forward in the [Kotter method](#) or the [ADKAR model](#). A change management team, whether a standing group or ad hoc, should comprise a diverse group that represents both those who are driving the change and those who are affected by it. This composition provides multiple perspectives, which can be used to inform the change process. In a college or university, this would generally include administration, staff, faculty, and students themselves. Regardless of whether the change is managed by one person or a team, at least one individual must have the authority and empathy to track reactions among those who are affected and to address fear or build consensus when needed. Those who manage the change must establish a rationale for the end goal, determine a path to get there, and ensure that stakeholders are notified about new developments throughout the process.

Change Management

3 Who's doing it?

Some institutions establish a dedicated team of change management professionals. At Northwestern University, the Office of Change Management engages with schools and departments, evaluating opportunities for institutional change, designing approaches to address challenges or develop solutions, and supporting the implementation of change. Supported initiatives run the gamut from university-wide strategic planning to optimization of loading docks to a new accreditation approach for Northwestern's School of Law. At the University of Notre Dame, the Office of Information Technologies, Training and Transition Services needed to train IT support staff for the campus-wide move to Gmail and Google Calendar. The change management team engaged IT staff with a game and launched the Google Apps Jedi Academy. IT staff were soon testing their knowledge of key features they would be supporting on the new Google platform. Non-IT staff soon asked to participate, and 92% later said they learned new skills. Rio Salado College developed a change management process outlined in "[Planning Transformational Change for Student Success within Higher Education](#)," which offers a step-by-step plan, walking the reader through each phase from preparation and brainstorming to feedback and development. The text includes brief examples of what Rio Salado did at each stage, suggested alternatives, and recommendations gleaned from experience.

4 Why is it significant?

A significant portion of change initiatives fail to achieve their goals, and **effective change management can improve the prospects of such efforts.** The college or university that employs some means of managing strategic change, whether administrative or pedagogic, is more likely to succeed, protecting its investments in money and human capital and positioning itself strategically in an educational ecosystem where changes are becoming more frequent and more pervasive. That said, change is always at least somewhat disruptive. A deliberate process of change management can clarify next steps and reassure participants, building a bridge between the existing campus culture and a critical project.

5 What are the downsides?

Change management takes time and focus, which some may see as additional effort on top of already difficult

initiatives, particularly those that involve institution-wide programs or services. Timely and inclusive communication often requires messages tailored to different audiences, adding to the complexity. When change management processes take longer than expected, some participants experience "change fatigue." A failure to notify and update populations affected by change can lead to communication via rumor, something that can leave a team struggling with crisis communications. Despite the benefits it offers, change management is rarely easy, and some will question whether the investment is justified.

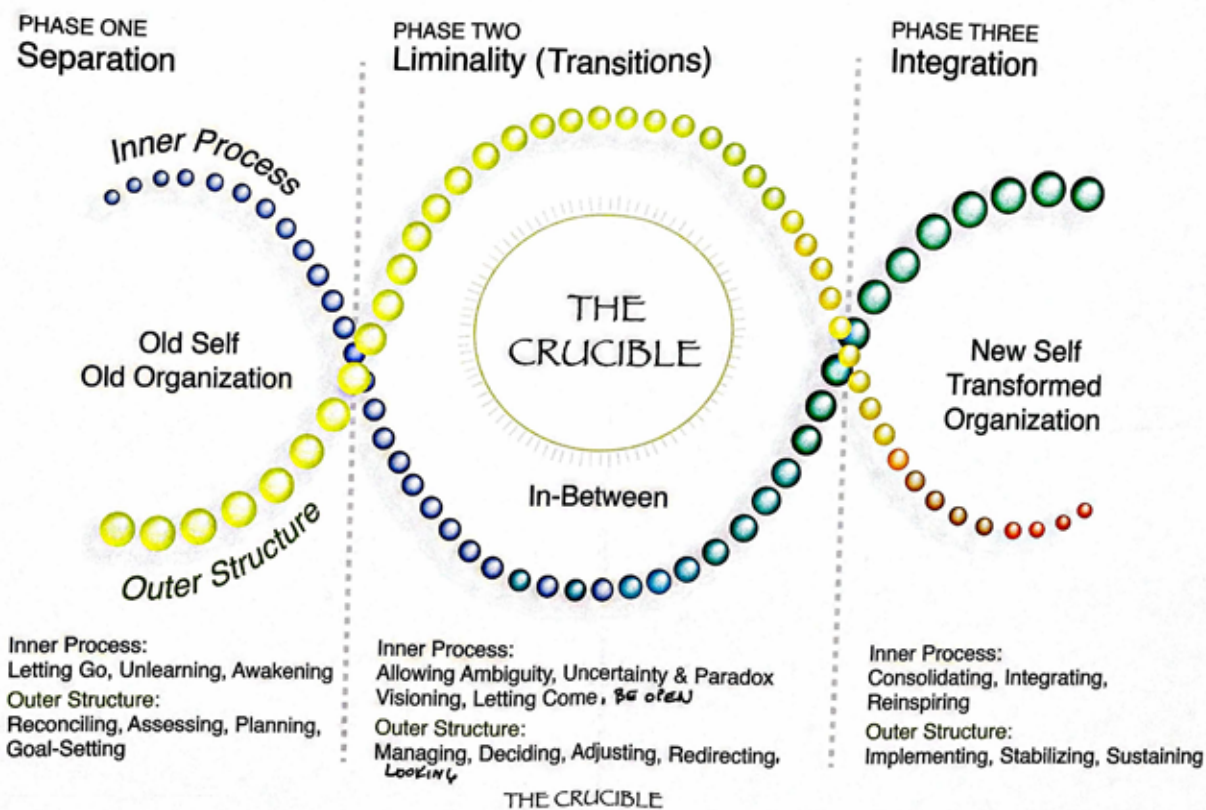
6 Where is it going?

The frequency of innovations in technology means that, although many projects can have discrete start and end dates, the *condition* of change is increasingly becoming a fact of life in higher education. **Colleges and universities that cultivate effective change management can accustom users to a state of ongoing change.** Here, technology provides support. Meetings associated with change can move online when necessary. Online public postings via social media can reach more participants and consumers in the information stream, making them more aware of change and better able to follow it as it evolves. Specialists in the field have observed that a strict organizational hierarchy interferes with successful change management, suggesting that a strong shared-governance model can be an advantage in these efforts.

7 What are the implications for teaching and learning?

The uneasiness that frequently accompanies change is a legitimate response to initiatives that directly affect teaching and learning. Programs that restructure classrooms can change course presentation from a lecture-based to a small-group model; blended or flipped classes can reorient faculty/student interactions; and social media used in coursework and research alters opportunities for and expectations of faculty. Yet, colleges and universities will continue to explore these and other changes. For that exploration to be successful, **skillful and effective change management needs to be part of the process so that good ideas—both big and small—won't be dismissed for the wrong reasons.** Change management provides a structure for including everyone affected, regardless of their attitude about the change.

LIMINAL PATHWAYS — A FRAMEWORK FOR CHANGE



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Figure 1: Liminal Pathways Framework by Gisela Wendling, PhD. <http://www.liminalpathways.com>

The Liminal Pathways Framework represents the “crucible phase” as the center of the transformative process—at the threshold or place of transition where one is no longer the old and not yet the new. In chemistry, crucibles are designed to contain large amounts of heat during chemical transformations. **The crucible holds the energy while its contents transform from one state to another.** In this model, the crucible is a metaphor for human interventions (or processes) that can contain and transform a great amount of tension – positive or negative – allowing for something new to occur. The container needs to be strong, and at times malleable and flexible, depending on what is needed to facilitate the change. Adapted from “Working with Crucibles of Change” by Gisela Wendling.

As change leaders, one of the greatest gifts to our stakeholders is to open ourselves up to the positive and negative feelings our change invokes in others – to walk in their shoes and listen to their stories. From this we can create processes and structures to transform their energy into a new reality that supports our change.

A story of crucibles in designing the Bridges Curriculum at UCSF

At the end of our second year of the Bridges project we designed a stakeholder retreat that continued to sell a clear and compelling message about why we were undertaking such a large-scale change in the curriculum. During the daylong event, we began to hear a clear message from our basic science community and MD/PhD community that the basic sciences and its related research were being given the back seat of the Bridges Curriculum. While this was not the intention of the Bridges Curriculum, it was the perception, and as change leaders we needed to address the challenging energy from this important group of stakeholders. Similarly, a different set of stakeholders were showing signs of boredom with the vision of the curriculum. They were sold on the change and ready to get down to work. No longer interested in talk, they wanted to see action.

The Bridges Curriculum leadership sensed and heard both stakeholder groups and the energy they were feeling about this change. The change leaders immediately began to design crucibles suitable for each type of energy.

Focusing on the scientific community in this example, we started by staying late the night of the retreat and sitting down with our basic science colleagues to hear their concerns. Using active listening, we reflected concerns and clarified our understanding of their concerns. We also reached a level of cooperation that led to several of these stakeholders volunteering to help design components of what would become the "Inquiry element" of the Bridges Curriculum. As a result of designing a crucible that could transform that challenging energy into ownership and action towards our future state of a new curriculum, one of the most innovative and unique elements of the Bridges Curriculum was born.

Kotter Change Management Stages

| | Description of Stage | Notes |
|---|---|-------|
| 1 | Establishing a Sense of Urgency: Help others see the urgency for change and convince them of the importance of acting immediately. | |
| 2 | Creating the Guiding Coalition: Assemble a group with enough influence to support your change as well as the right people to join your project team. | |
| 3 | Developing a Change Vision: Create a vision that clearly articulates a future state in response to the urgent situation. The vision will direct the change effort and lead to strategies for achieving that vision. | |
| 4 | Communicating the Vision for Buy-in: Continuously work to make sure your stakeholders understand the vision and the strategy to achieve that vision. Expect to revise your vision and strategy based on stakeholder input. | |
| 5 | Remove Obstacles and Empower Action: Identify barriers achieving your vision change (people, systems, policy, procedures); strategize ways to overcome these barriers by nontraditional ideas, activities, and actions. | |
| 6 | Plan and Create Short-term Wins: Plan pilot activities that demonstrate your vision can work and clearly communicate the success; recognize those who were involved. | |
| 7 | Consolidate Gains: Leverage success from pilots to scale up and support the structures, policies, funding, and people skills needed to solidify your change in the organization. | |
| 8 | Anchor into the Culture: Celebrate the successes you have achieved and emphasize them as part of your new normal, while reminding your community of the specific initiatives that make up this new normal. | |

Leading Change- Small Group Activity

Your small group represents a change leadership team. You have been tasked with developing a strategy to lead a special initiative at your institution. Work through the stages 1-3 of Kotter's Change Model and prepare a 5-minute presentation selling your change to the organization.

Email Management Project

For two consecutive years, burn-out scores have been very high among faculty and staff. To address this issue the Chancellor has decided to limit individuals' access to email.

Your team is charged to design a change management plan for this project. Outline your plan for the first three stages of Kotter's Model and be prepared to discuss with the group.

Stage 1: Create Urgency

Develop a sense of urgency around the need for change.

- What are the potential threats to your initiative?
- Are there scenarios you can imagine happening in the future if you don't implement this change?
- Determine some dynamic and convincing reasons in support of your change.

Stage 2: Form a Powerful Coalition

Identify a team of influential people within your organization to help you.

- Who are the true leaders in your organization?
- Make sure you have a good mix of people from different departments and different levels.
- How will you bring your team together?

Stage 3: Create a Vision for Change

Create a clear vision that people can grasp easily and remember.

- What values are central to your change initiative?
- Develop a short summary (1-2 sentences) that captures what you “see” as the future of your organization.
- What is your strategy to execute your vision?
- Ensure that you (and others) can describe your vision in 5 minutes or less. This is your elevator pitch.

| | |
|--------------------------------|-----------------------|
| Outline for 5-min Presentation | Presenter Name: _____ |
|--------------------------------|-----------------------|

UCSF Bridges Curriculum

A Case Study in Change Leadership using Kotter’s Stages of Change Model



In the spring of 2012 the UCSF School of Medicine embarked on a journey to completely transform medical education from a process that trained future leaders who would transform health care, to one where educators and the students they train were learning and doing the work of health care, while also improving the health care system. This new curriculum sought to build bridges across the many gaps that divided health care in the United States.

| Kotter Stage | Your Plan |
|---|--|
| <p>Stage 1: Create Urgency Develop a sense of urgency around the need for change. This isn't simply a matter of showing people poor morale statistics or talking about increased workload answering email. Create an honest and convincing dialogue about what's happening in the workplace.</p> <p>What you can do:</p> <ol style="list-style-type: none"> 1. Identify potential threats if you don't implement the change, and develop scenarios showing what could happen in the future. 2. Start honest discussions, and give dynamic and convincing reasons to get people talking and thinking. 3. Request support from colleagues, outside stakeholders and leaders to strengthen your argument. <p>Tip: <i>When presenting, convince me that if we don't do this it will have a personal negative impact on me and on the organization.</i></p> | <p>Before we communicated a sense of urgency around the need for change we began by honoring our past. For change to happen people must let go of their current reality and as a change leader it is important to honor that past.</p> <p>UCSF honored its past by acknowledging that it already had a pedagogically superb curriculum that was competency based; that used innovative tools for teaching and assessment; and that focused on life-long learning.</p> <p>Next we clarified the problem we wanted to solve with a new curriculum by pointing out that 21st century health problems were system problems. These included complex chronic disease, a need for health care safety and quality; an increase in health disparities and the need for new models of discovery.</p> <p>We appealed to the head and to the heart in communicating our message or urgency. We gathered and told as many stories as we could about how the health system was broken and how patients were suffering. Medical schools say they have been training leaders who will fix the health care system for over 50 years, yet we are faced with the most expensive and error prone system in the world.</p> <p>Watch: "UCSF Prepares Ambitious Reboot of Medical School Curriculum" at https://youtu.be/RZWPK-EqYm0</p> |

Step 2: Form a Powerful Coalition

Convince people that change is necessary. This often takes strong leadership and visible support from key people within your organization. You can find effective change leaders throughout your organization – they don't necessarily follow the traditional company hierarchy. To lead change, you need to bring together a coalition, or team, of influential people whose power comes from a variety of sources, including job title, status, expertise, and political importance.

Once formed, your "change coalition" needs to work as a team, continuing to build urgency and momentum around the need for change.

What you can do:

1. Identify the true leaders in your organization.
2. Ask for an emotional commitment from these people.
3. Work on team building within your change coalition.
4. Check your team for weak areas, and ensure that you have a good mix of people from different departments and different levels within your organization.

Tip: Think outside the box when identifying change leaders. Sometimes the most influential people in an organization are the ones who don't hold leadership titles or identify as leaders in their everyday job.

Next we built a guiding coalition to lead this change by identifying leaders and social connectors across our stakeholder groups and the phases of the curriculum.

We began by mapping out our stakeholders using a 2x2 grid that compared the groups power over the change and the overall impact of the change on them.

| | |
|---|---|
| <p>High Power Low Impact</p> <p>Keep this group well informed. Example: the dean of the school and LCME have high power over your change but will not be directly impacted by the change.</p> | <p>High Power High Impact</p> <p>Engage this group in the change. Example: Course and clerkship directors have a lot of power to derail change and that will be highly impacted by the change. You want these stakeholders on the side of change and helping to lead the effort.</p> |
| <p>Low Power Low Impact</p> <p>Monitor this group. Example: Leadership in other UCSF health professions schools have low power and impact on this project, but it is important to monitor how this change may impact them in the future.</p> | <p>Low Power High Impact</p> <p>Keep this group informed. Example: Students and staff are prime example of stakeholders who have limited power but who will be highly impacted by the change. Engage them in the work and keep them well informed.</p> |

Our guiding coalition included the chancellor, dean, key faculty, health system leadership, nursing, pharmacy and dental faculty, staff, students, residents and basic scientists.

Some of these individuals were identified as Bridges Champions and were the "first to know" about new decisions and innovations. They got Bridges Buttons and materials to communicate to others.

Step 3: Create a Vision for Change

When you first start thinking about change, there will probably be many great ideas and solutions floating around. Link these concepts to an overall vision that people can grasp easily and remember.

A clear vision can help everyone understand why you're asking them to do something. When people see for themselves what you're trying to achieve, then the directives they're given tend to make more sense.

What you can do:

1. Determine the values that are central to the change.
2. Develop a short summary (one or two sentences) that captures what you "see" as the future of your organization.
3. Create a strategy to execute that vision.
4. Ensure that your change coalition can describe the vision in five minutes or less.
5. Practice your "vision speech" often.

Tip: Be prepared to deliver your vision speech in time it takes for you to cross the street with a colleague.

What will the future look like with Bridges?

We created an elevator pitch and socialized it at a curriculum retreat. After instilling in our stakeholders the urgency for change, we relieved their anxiety by offering a vision for the future:

The goal of the UCSF Bridges Curriculum is to better prepare physicians to contribute more than clinical expertise to the complex systems in which they work. Students, and the physicians they will become, need to collaboratively and continuously innovate to improve our health care and biomedical discovery systems.

In addition, we created a set of Emerging and Enduring Values for the 21st Century Physician. The enduring values were important for our current physician community so they could see where the existing skills were still relevant to the future.

Our strategy for communicating this vision was multipronged and included written and verbal communication, retreat settings, videos, etc.

Step 4: Communicate the Vision

What you do with your vision after you create it will determine your success. Your message will probably have strong competition from other day-to-day communications within the organization, so you need to communicate it frequently and powerfully, and embed it within everything that you do.

Don't just call special meetings to communicate your vision. Instead, talk about it every chance you get. Use the vision daily to make decisions and solve problems. When you keep it fresh on everyone's minds, they'll remember it and respond to it.

It's also important to "walk the talk." What you do is far more important – and believable – than what you say. Demonstrate the kind of behavior that you want from others.

What you can do:

1. Talk often about your change vision.
2. Openly and honestly address peoples' concerns and anxieties.
3. Apply your vision to all aspects of operations – from training to performance reviews. Tie everything back to the vision.
4. Lead by example.

UCSF created a full communication strategy document and toolkit that anyone could use to communicate a clear and consistent message about the change. Specific activities included:

Bridges in a Minute Postcards that describe the sense of urgency, our vision and our plan of action:

Urgency: The US health care system costs over \$2.5 trillion per year and still we rank 16th behind other wealthy nations in overall health. Medical schools have long claimed to train future leaders who will fix this broken system, yet things are slow to improve. This is because we fail to provide them with the skills to understand complex health care systems, navigate vast data networks, and work in truly collaborative teams.

Vision: The goal of the UCSF Bridges Curriculum is to better prepare physicians to contribute more than clinical expertise to the complex systems in which they work. Students, and the physicians they will become, need to collaboratively and continuously innovate to improve our health care and biomedical discovery systems.

Plan: To do this, Bridges will provide authentic workplace learning experiences that leverage the talents and commitment of our students to improve health today while sustaining these skills in future practice.

We also created a website, monthly newsletter sent to colleagues inside and outside UCSF, identified internal champions, Tweeted, created videos and presented grand-rounds to many UCSF departments.

See <http://meded.ucsf.edu/bridges>

Step 5: Remove Obstacles

By the time you reach this point in the change process, you've been talking about your vision and building buy-in from all levels of the organization. Hopefully, your stakeholders are ready to achieve the benefits that you've been promoting.

You are putting in place the structured for change, and continually check in for barriers to it. Removing obstacles can empower the people you need to execute your vision, and it can help the change move forward.

What you can do:

1. Identify, or hire, change leaders whose main roles are to deliver the change.
2. Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.
3. Recognize and reward people for making change happen.
4. Identify people who are resisting the change, and create structure and processes to help them move towards the new reality.
5. Take action to quickly remove barriers (human or otherwise).

UCSF took its vision on the road to present and hear feedback from faculty across our health affiliates; our student body and our staff. Much of the feedback raised concerns about barriers to the change which we could document and work to remove or minimize.

We carefully resourced the change with individuals charged with change leadership, communications, committee leadership and volunteers.

We aligned staff roles to work on the change per their job descriptions, but also sought staff volunteers who would not naturally have the chance to work on the change, but who would inherit the outcomes.

We rewarded and recognized people doing the work at curriculum retreats and through our monthly newsletters and website.

We aligned intramural funding opportunities to the priorities of the change to promote innovation.

We ran annual "readiness for change" surveys to identify specific concerns and stakeholders who needed help through the change.

Note: Don't be disheartened if you perceive that your hard work and extensive communications are not being heard by stakeholders. This is a natural part of change. Remain persistent, clear and comprehensive in your strategies and you will help your stakeholders embrace the change.

Step 6: Create Short-term Wins

Nothing motivates more than success. Give your organization a taste of victory early in the change process. Within a short timeframe (this could be a month or a year, depending on the type of change), you'll want to have results that your stakeholders can see. Without this, critics and negative thinkers might hurt your progress.

Create short-term targets – not just one long-term goal. You want each smaller target to be achievable, with little room for failure. Your change team may have to work very hard to come up with these targets, but each "win" that you produce can further motivate the entire staff.

What you can do:

1. Look for sure-fire projects that you can implement without help from any strong critics of the change.
2. Don't choose early targets that are expensive. You want to be able to justify the investment in each project.
3. Thoroughly analyze the potential pros and cons of your targets. If you don't succeed with an early goal, it can hurt your entire change initiative.
4. Reward the people who help you meet the targets.

UCSF immediately created experiments in systems improvement and workplace learning and publicized and celebrated these pilots for the successes and their failures.

We applied for and received one of the first 11 American Medical Association grants to Accelerate Change in Medical Education (ACE) thus validating our vision for change by an outside organization.

We taught workshops on design thinking so stakeholders could identify problems, create rapid prototypes, seek appropriate feedback and revise new ideas and interventions. This allowed us to create and test new ideas rapidly and to celebrate the successful ones.

We held annual retreats to celebrate our successes and inspire stakeholders for the next phase of work.

Step 7: Build on the Change

Kotter argues that many change initiatives fail because victory is declared too early. Real change runs deep. Quick wins are only the beginning of what needs to be done to achieve long-term change.

Launching one new component of an initiative is great. But if you can launch multiple components, that means the new initiative is truly being successful. To reach multiple successes, you need to pursue continuous improvement.

Each success provides an opportunity to build on what went right and identify what you can improve.

What you can do:

1. After every win, analyze what went right and what needs improving.
2. Set goals to continue building on the momentum you've achieved.
3. Embrace a methodology of continuous improvement.
4. Keep ideas fresh by bringing in new change agents and leaders for your change coalition.

The Bridges Curriculum governance structure was tasked with formally evaluating all pilots and incorporating the best of each process into the next iteration of work. Likewise, they communicated pitfalls for other teams to avoid.

The governance structure was in continual renewal as experts were brought in for innovations best suited for their talents. This allowed us to tap highly sought after and expert faculty who would not be able to engage in long term development work.

Step 8: Anchor the Changes in Your Culture

Finally, to make any change stick, it should become part of the core of your organization. Your culture often determines what gets done, so the values behind your vision must show in day-to-day work.

Make continuous efforts to ensure that the change is seen in every aspect of your organization. This will help give that change a solid place in your organization's culture.

It's also important that your organization's leaders continue to support the change. This includes existing staff and new leaders who are brought in. If you lose the support of these people, you might end up back where you started.

What you can do:

1. Talk about progress every chance you get. Tell success stories about the change process, and repeat other stories that you hear.
2. Include the change ideals and values when hiring and training new staff.
3. Publicly recognize key members of your original change coalition, and make sure the rest of the staff – new and old – remembers their contributions.
4. Create plans to replace key leaders of change as they move on. This will help ensure that their legacy is not lost or forgotten.

When pilots were successful we immediately looked at how to expand the reach of these and integrate them into the existing (Pre-Bridges) curriculum. This also alleviated anxiety from students who would graduate before the incoming Bridges class, knowing they would benefit from the new innovations, many of which they helped design and build.

A rigorous communication plan was put into place that repeated the important messages to the UCSF community. Once any elements of the new curriculum were finalized they were publicized along with success data from their pilot phases. A Bridges website captured all the information and presented it back to relevant stakeholders.

A new funding and organization structure were created to support the Bridges Curriculum. These models were presented and discussed with department chairs and the dean for months before being finalized and implemented. For many department chairs this was the most significant contribution they could make to the education mission. New support staff were hired specifically to support the new curriculum.

UCSF recruited for a new curriculum dean within the year after the launch of Bridges. The job description was crafted specifically to align to the Bridges values. A measure of success came from how well versed external job applicants were in the philosophy and structure of the new curriculum.

Kotter Change Management Template

You must work hard to change an organization successfully. When you plan carefully and build the proper foundation, implementing change can be much easier, and you'll improve the chances of success. Create a sense of urgency, recruit powerful change leaders, build a vision and effectively communicate it, remove obstacles, create quick wins, and build on your momentum. If you pace yourself and follow through each of these steps, you can help make the change part of your organizational culture. That's when you can declare a true victory. Then sit back and enjoy the change that you envisioned so long ago.

| Kotter Stage | Your Plan |
|---|-----------|
| <p>Stage 1: Create Urgency</p> <p>Develop a sense of urgency around the need for change. This isn't simply a matter of showing people poor morale statistics or talking about increased workload answering email. Create an honest and convincing dialogue about what's happening in the workplace.</p> <p>What you can do:</p> <ol style="list-style-type: none"> 1. Identify potential threats if you don't implement the change, and develop scenarios showing what could happen in the future. 2. Start honest discussions, and give dynamic and convincing reasons to get people talking and thinking. 3. Request support from colleagues, outside stakeholders and leaders to strengthen your argument. <p>Tip: <i>When presenting, convince me that if we don't do this it will have a personal negative impact on me and on the organization.</i></p> | |

Step 2: Form a Powerful Coalition

Convince people that change is necessary. This often takes strong leadership and visible support from key people within your organization. You can find effective change leaders throughout your organization – they don't necessarily follow the traditional company hierarchy. To lead change, you need to bring together a coalition, or team, of influential people whose power comes from a variety of sources, including job title, status, expertise, and political importance.

Once formed, your "change coalition" needs to work as a team, continuing to build urgency and momentum around the need for change.

What you can do:

1. Identify the true leaders in your organization.
2. Ask for an emotional commitment from these people.
3. Work on team building within your change coalition.
4. Check your team for weak areas, and ensure that you have a good mix of people from different departments and different levels within your organization.

Tip: *Think outside the box when identifying change leaders. Sometimes the most influential people in an organization are the ones who don't hold leadership titles or identify as leaders in their everyday job.*

Step 3: Create a Vision for Change

When you first start thinking about change, there will probably be many great ideas and solutions floating around. Link these concepts to an overall vision that people can grasp easily and remember.

A clear vision can help everyone understand why you're asking them to do something. When people see for themselves what you're trying to achieve, then the directives they're given tend to make more sense.

What you can do:

1. Determine the values that are central to the change.
2. Develop a short summary (one or two sentences) that captures what you "see" as the future of your organization.
3. Create a strategy to execute that vision.
4. Ensure that your change coalition can describe the vision in five minutes or less.
5. Practice your "vision speech" often.

Tip: Be prepared to deliver your vision speech in time it takes for you to cross the street with a colleague.

Step 4: Communicate the Vision

What you do with your vision after you create it will determine your success. Your message will probably have strong competition from other day-to-day communications within the organization, so you need to communicate it frequently and powerfully, and embed it within everything that you do.

Don't just call special meetings to communicate your vision. Instead, talk about it every chance you get. Use the vision daily to make decisions and solve problems. When you keep it fresh on everyone's minds, they'll remember it and respond to it.

It's also important to "walk the talk." What you do is far more important – and believable – than what you say. Demonstrate the kind of behavior that you want from others.

What you can do:

1. Talk often about your change vision.
2. Openly and honestly address peoples' concerns and anxieties.
3. Apply your vision to all aspects of operations – from training to performance reviews. Tie everything back to the vision.
4. Lead by example.

Step 5: Remove Obstacles

By the time you reach this point in the change process, you've been talking about your vision and building buy-in from all levels of the organization. Hopefully, your stakeholders are ready to achieve the benefits that you've been promoting.

You are putting in place the structured for change, and continually check in for barriers to it. Removing obstacles can empower the people you need to execute your vision, and it can help the change move forward.

What you can do:

1. Identify, or hire, change leaders whose main roles are to deliver the change.
2. Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.
3. Recognize and reward people for making change happen.
4. Identify people who are resisting the change, and create structure and processes to help them move towards the new reality.
5. Take action to quickly remove barriers (human or otherwise).

Step 6: Create Short-term Wins

Nothing motivates more than success. Give your organization a taste of victory early in the change process. Within a short timeframe (this could be a month or a year, depending on the type of change), you'll want to have results that your stakeholders can see. Without this, critics and negative thinkers might hurt your progress.

Create short-term targets – not just one long-term goal. You want each smaller target to be achievable, with little room for failure. Your change team may have to work very hard to come up with these targets, but each "win" that you produce can further motivate the entire staff.

What you can do:

1. Look for sure-fire projects that you can implement without help from any strong critics of the change.
2. Don't choose early targets that are expensive. You want to be able to justify the investment in each project.
3. Thoroughly analyze the potential pros and cons of your targets. If you don't succeed with an early goal, it can hurt your entire change initiative.
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