Understanding and managing change in medical education: Borrowing from business the "Competing Values Framework"

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SUBMISSION ROLE: Sessions on Medical Education

ABSTRACT BODY:

Topic Short Description: Change in medical education, at both individual and organizational levels, is ubiquitous, and underlying AAMC Conference themes is the concept of change. From transitions across the lifespan (e.g., UME to GME), to adjusting to new jobs or responsibilities, medical educators need to understand and manage individual change. Moreover, they need to understand and manage organizational change in the wake of major curriculum reform efforts (which includes the majority of medical schools), implementing competency-based education, continuous quality improvement initiatives, etc. In many cases, organizational change is not optional. In virtually all cases, organizational change affords both opportunity and disruption. Suffice it to say, medical educators will experience the challenges and turmoil of change repeatedly during their work life span.

Medical educators rely on past experience, best practices, and theory (e.g., adult learning theory) to navigate changes they encounter in professional settings. These sources of ideas, guides, and heuristics may help but don’t always satisfy or provide sufficient support. In this session, we will introduce the Competing Values Framework as a tool to better understand and manage change in medical education. This Framework is well established in the business community, but, with a few exceptions is largely unknown in medical education. Although the Framework is useful for understanding and managing individual and organizational change, this session will speak to the former but focus on the latter.

Organizational culture comprises values held in common by members of the organization. The Competing Values Framework posits that organizations can be characterized along two orthogonal dimensions. Each dimension represents alternative approaches to dealing with change: control and centralization versus flexibility and decentralization. Overlaid, these two dimensions serve as axes and create four quadrants. Each quadrant represents a cultural archetype that embraces certain values: (1) “Do things FIRST”-- create, break through; (2) “Do things FAST”-- compete, focus on short-term performance; (3) “Do things RIGHT”-- control, work incrementally; (4) “Do things TOGETHER”-- collaborate, focus on long-term development. The key to using the Competing Values Framework effectively is to first recognize which quadrant is dominant, which is most needed for a specific change initiative, and then to ensure sufficient attention is also given to the ‘competing values’ from other quadrants.

For the past few years, two of the presenters (AT, LG) have adapted the business version of the Competing Values Framework to guide curricular transformation at the University of Michigan. They will share their working knowledge of, and experience with, the Framework. Following brief reactions from presenters about the Framework who are educational leaders but less familiar with the Framework (FH, GS), the facilitators will guide a rich discussion between the presenters and session participants of the potential of the Framework to inform change management in a variety of medical education settings (e.g., UME, GME, faculty affairs).

We dedicate this session, and our efforts to promote effective change, to Karen Mann, a wonderful colleague and friend who championed change throughout her career, a career recently cut short by cancer. Her passing represents a tremendous loss to the medical education community and we wish to recognize her contributions as a leader and change agent.

Presenters: Tony Tsai, MBA, Director of Educational Strategy, University of Utah. Has expertise in using the Competing Values Framework in business and educational settings.
Larry Gruppen, PhD, Department of Learning Health Sciences, University of Michigan Medical School. Has considerable experience using this and other tools to elucidate differences in styles and preferences related to education.
Fred Hafferty, PhD, Mayo Clinic. Has expertise in medical sociology and understanding how organizations “work”.
Gail Slap, MD, MS, University of Pennsylvania Perelman School of Medicine and Vice Chair for Education,
Department of Pediatrics. Has considerable experience in a range of educational leadership roles and has managed many change projects.

Facilitator: Boyd Richards, PhD, Columbia University Medical Center, Has many years of experience designing and facilitating large group discussions of this type.

Dorene Balmer, PhD, University of Pennsylvania Perelman School of Medicine. Has years of experience designing and facilitating large group discussions of this type.

Learning Objectives: 1. Describe the core elements of the Competing Values Framework as applied in the business community and its adaptation into medical education
2. Identify and explain the quadrants of the Framework and identify the values that appear to be primary in their own lives and in their institution/organization(s).
3. Use the Framework to discuss a case example of organizational change and identify potential benefits of using the Framework to manage change.

Session Plan: To organize the session and engage session participants, we will:
[1]. Introduce the session: [5 minutes] - Introduce presenters and facilitators; frame the session by restating the constancy of change in medical education
[2] Ensure understanding of the Framework: [15 minutes] - Provide a brief didactic of the Competing Values Framework; ask participants to identify the quadrant and related values they embrace and the values embraced by their home institution/organization; work in dyads or triads to debrief values identification; use Poll Anywhere to document range of values identified by participants, followed by large group discussion of poll outcomes and Q&A
[3] Apply the Framework to case: [20 minutes] - Present case example of organizational change using the Framework; engage participants in small groups at tables to critique the Framework and its application; move amongst tables to answer questions, guide discussions, and identify themes common among table discussions.
[4] Apply the Framework to real-world changes: [20 minutes] - Facilitate large group discussion of themes followed by Q&A; make concluding statements and call for consideration of Framework in ongoing change initiatives

2. Ovseiko PV, Buchan AM. Organizational culture in an academic health center: an exploratory study using a competing values framework. Acad Med 2012;87:709-18

Level of Audience: Mid-career
Focus of Presentation: UME, GME, CME, Continuum

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