PGME Retreat
May 25 2018

Preparing for the “People Side of Change” of CBME
Session Facilitators

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CBME Lead
Anesthesiology

Jennifer Bernardo
Learning & Development
Topics for today’s session:

- Anesthesiology’s transition to CBME. What does it mean for you?
- What is “Change Management”?
- Preparing Yourself for the Transition to CBME
- Leading Individuals in the Transition to CBME
- Building Relationships within Your Program
- Strategies for Managing Resistance
Anesthesiology’s Transition to CBME. What does it mean for you?
What is Change Management

• The “3 States of Change”

• Differentiating between Project Management vs. Change Management

• Change is an individual process
States of Change

Current → Transition → Future
Project Management vs. Change Management?

Successful CM = Embrace, Adopt & Utilize CBME
Change is an “Individual Process”

The “Goal”

The “Reality”
Preparing Yourself for Change:
Are you ready for the transition to CBME?
Preparing Yourself for CBME

Are YOU ready for change?
Assess YOUR Change Readiness & Identify Action Items

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Rating (1-5)</th>
<th>Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can envision the “future state” of CBME within my Program</td>
<td></td>
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<tr>
<td>I have the information and knowledge I require regarding the transition to CBME, based on where my program is in the change process.</td>
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<tr>
<td>I have given thought as to what this transition “means to me” and how it may impact my role(s) within the Program (Faculty, Competence Committee, etc.)</td>
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<tr>
<td>I have identified and addressed concerns, risks, and possible barriers for me personally, in order to be effective in leading</td>
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Leading Others in the Transition to CBME
Leading Others in the Transition to CBME....
Identify stakeholders in YOUR Program

What IMPACT will the transition to CBME have on these stakeholders?
Involve Stakeholders Early in the Transition to CBME
Remember:
Change is an “Individual Process”

The “Goal”

The “Reality”
# Anticipate What to Expect (Behaviours/Emotions)

<table>
<thead>
<tr>
<th>Current State</th>
<th>Transition State</th>
<th>Future State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior to Change:</td>
<td>• Confidence in abilities</td>
<td>• Commitment</td>
</tr>
<tr>
<td>• Comfortable with status quo</td>
<td>• Conflict</td>
<td>• Re-energized</td>
</tr>
<tr>
<td>• Know what to expect</td>
<td>• Stress</td>
<td>• Engaged</td>
</tr>
<tr>
<td>Informed of Change:</td>
<td>• Helplessness</td>
<td>• Hopeful</td>
</tr>
<tr>
<td>• Why?</td>
<td>• Innovation</td>
<td>• Acceptance</td>
</tr>
<tr>
<td>• Impact on me?</td>
<td>• Learning</td>
<td>• Proud of Accomplishment</td>
</tr>
<tr>
<td>• Excitement</td>
<td>• Uncertainty</td>
<td>• Confident</td>
</tr>
<tr>
<td>• Denial</td>
<td>• Loss confidence</td>
<td>• Increased proficiency and utilization</td>
</tr>
<tr>
<td>• Anger</td>
<td>• Confusion</td>
<td>• Lower productivity</td>
</tr>
<tr>
<td>• Apathy</td>
<td>• Frustration</td>
<td>• Ambiguity</td>
</tr>
<tr>
<td>• Anxiety</td>
<td>• Resentment</td>
<td></td>
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</table>
Strategies for Leading Others in the Transition to CBME
Strategies for Leading Others in the Transition to CBME....

March 20, 2017

CBD Conversations #1 - Change

"Nothing will change, except the amount of paperwork we will need to do, but nothing meaningful will change."

"This is just a vehicle for someone’s pet project at the Royal College."
## Strategies for Leading Others in the Transition to CBME

<table>
<thead>
<tr>
<th>Strategy</th>
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</thead>
<tbody>
<tr>
<td>Assess Stakeholder Change Readiness</td>
</tr>
<tr>
<td>Communicate</td>
</tr>
<tr>
<td>Coach Individuals</td>
</tr>
<tr>
<td>Build Relationships within Your Program</td>
</tr>
<tr>
<td>Manage Resistance</td>
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</tbody>
</table>
Assess STAKEHOLDER Change Readiness

Wilfried Kruger’s “Iceberg Model of Change”
Communication is Key!

<table>
<thead>
<tr>
<th>Individuals need information to make the transition to CBME happen</th>
<th>Without information EARLY in the process individuals tend to maintain the status quo, or make assumptions on how to move forward</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals tend to be more committed to change, when they understand the “why”</td>
<td>Addressing the “why” is a first step in change management</td>
</tr>
<tr>
<td>Sharing information gives individuals opportunity to more fully participate and have ownership in the transition to CBME</td>
<td>Individual commitment may be impacted without opportunities to participate and have ownership in the transition</td>
</tr>
<tr>
<td>Regular, candid, and timely communication enhances credibility</td>
<td>Lack of information breeds uncertainty, anxiety, which interferes with focus, productivity, and engagement</td>
</tr>
<tr>
<td>“All information” may not be available at a particular moment in time related to the transition to CBME</td>
<td>Lack of transparency about available information and possible “unknowns” moving forward may build distrust</td>
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</table>
Communication Pitfalls

1. Believing that communicating a message once or twice is enough.

2. Waiting till you have all the answers...you likely won’t.

3. Underestimating the “Grapevine” as a source of information considered reliable for stakeholders.

4. Relying too much on email, reports, etc.

5. Avoiding “resistant” stakeholders.
Communication- Action Items

Communication Checklist

- Silence is not an option
- Build up to the details (start general to build a foundation)
- Articulate a vision of the “future state”
- Be Candid
- Build in Opportunities for two way communication
- Repeat key messages

Communication Activities

States of Change

Current ➔ Transition ➔ Future
Coaching Individuals - Action Items

Coaching Checklist

- Remember change is an individual process – everyone is different in how they will transition to CBME
- Assess Change Readiness of key stakeholders throughout the transition to CBME
- Ask questions – what do they need to be successful in this transition to CBME
- Provide information, training, resources, and support and other strategies in the transition to CBME

Coaching Opportunities
Building Relationships Within Your Program – Action Items

Checklist

- Ongoing and regular communication, updates, and information (preferably face to face if possible!)

- Acknowledge challenges or setbacks, ask questions and check in regularly to assess barriers to your program’s transition to CBME

- Recognize & celebrate key milestones in moving towards the “future” state

- Engage stakeholders who may be creating tension, negativity, or generally preventing the team in moving forward
# Strategies for Leading Others in the Transition to CBME in YOUR Program:

**PGME Retreat (May 25 2018):**
Preparing for the “People Side of Change” of CBME
Participant Worksheet

<table>
<thead>
<tr>
<th>Stakeholders (Who is Impacted?)</th>
<th>Impact of CBME? (What is changing for this individual—process, role, time, technology, culture?)</th>
<th>Change Readiness Assessment? (Promoter, Potential Promoter, Hidden Opponent, Opponent)</th>
<th>Strategies for Leading Others in the Transition to CBME (How?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident</td>
<td></td>
<td></td>
<td>Communication Coaching Building Relationships Managing Resistance</td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
<td></td>
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<tr>
<td>Competence Committee</td>
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<td></td>
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<tr>
<td>Program Director</td>
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**Resources**
- [Royal College of Physicians and Surgeons of Canada - CBD](http://www.rccs.org)
- [Schulich PGME CBME Resources](http://www.schulichmedicine.org)
- [CBD Anesthesiology](http://www.cbdanesthesiology.org)
Strategies for Managing Resistance
Managing Resistance

“Change is never painful, only the resistance to change is painful.”

~ Buddha ~

OkyDay.com
Why Resistance?

What is the project?
Why are we doing it?
When will this happen?
Why now?
Who’s involved?
How did the project get started?
Where do I find out more?
How will this be implemented?
What’s in it for me?
Will I receive training?
What are the benefits?
How much additional time will this add to my already busy schedule?
How will this affect me?
Can I learn new ways?
What should I be doing now?
Managing Resistance - Action Items

“Stakeholder Resistance” Checklist

- Try to understand the “Why(s)” and root causes of resistance
- Remove “Barriers” where possible
- Early intervention is key, do not let resistance escalate
- Provide education & support, but also clearly outline expectations and hold accountable
- Engage, do not avoid resistance

Strategies to Managing Resistance

States of Change

Current → Transition → Future
Final Thoughts

• Remember you are not alone!

• Know where to access resources and support

• Share Best Practices with other Programs who have transitioned/are transitioning to CBME

• Resilience
Questions....

“Leadership is the capacity to translate vision into reality.”
—Warren Bennis