LEADERSHIP: CHANGE IN RESIDENCY

Dr. Lei Xia

Anesthesiologist

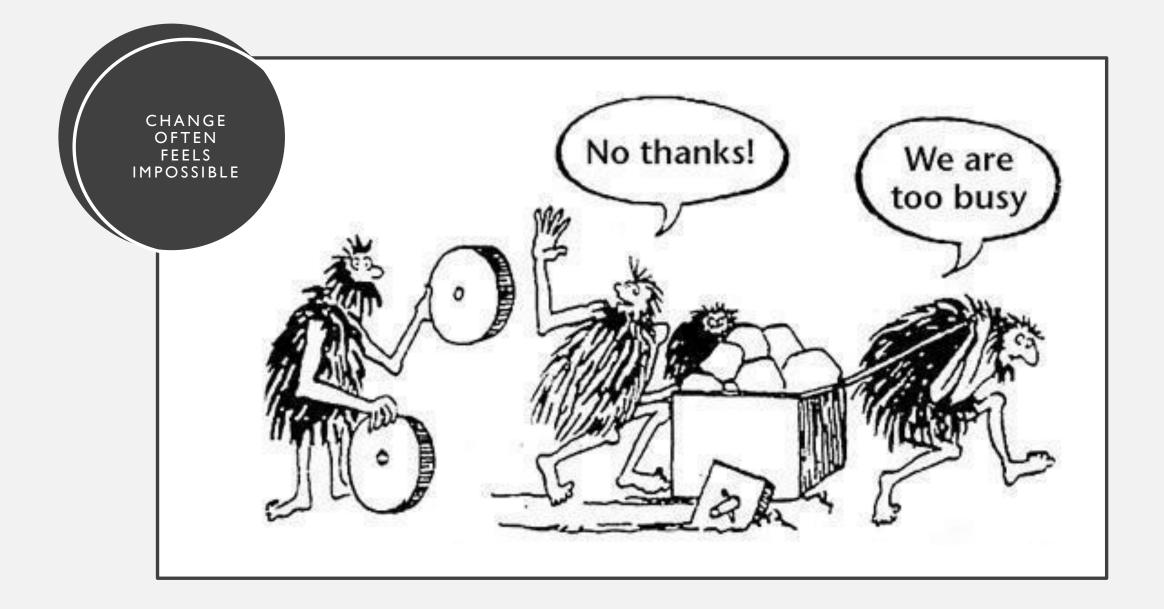*candidate for* MA in Health Leadership

CHANGE OFTEN FEELS IMPOSSIBLE

No thanks!

We are too busy

ROYAL ROADS UNIVERSITY

RRU MA HEALTH LEADERSHIP

- 2 year interdisciplinary Master's of Arts program.

- Mostly distance learning, with 2 weeks on campus each year.

- Focus on real world problem-solving projects grounded in a rigorous theoretical understanding of the nature of today's organizations and the changing role of leadership within them.

- Comprehensive leadership studies address adult learning, emotional intelligence, communication and conflict, systems thinking, team facilitation and development, organizational change, and action research inquiry.

- They required at least 5 years of leadership experience, and they want people to continue their work in healthcare while doing the master's program.

CHIEF RESIDENT WORKSHOP: THE DIGITAL CHIEF

Lei Xia

Anesthesiology PGY4

SHAREPOINT

- Microsoft SharePoint is a powerful web-based content management platform

- You can share and edit documents, calendars, and discussion boards

- Complete control who can read, edit, or make changes

- USASK server undergoes a full backup nightly, with hourly incremental backups

- Access only requires a UofS NSID

SharePoint

Newsfeed   OneDrive   Sites   Xia, Lei ▾

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Pop-out menu

UNIVERSITY OF SASKATCHEWAN | Anesthesiology

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Weekly/Annual Schedule

CBD Bootcamp

Resident Manual

Resident Forms

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Grand Rounds

ECHO Rounds

Rotation Resources

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IT How-To Information

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Site Contents

Main content

...cceed in anesthesia at the U of S. Feel free to browse around and make contributions to this expanding
...change to a file on this site, it will change for everyone.

...s, try "**USASK\nsid**" as your username.

...y questions or suggestions to make. You can contact Lei through any means necessary as well.

	Modified
Palliative Care ⋯	February 24
⋯	January 18
⋯	November 25, 2015
⋯	November 13, 2015
...nail List ⋯	July 2, 2015
...hedules, Switches, etc ⋯	October 15, 2014
...and Regina Rotation ⋯	December 2, 2013

Anesthesia Residents

Today ◀ ▶   Thursday, March 10 ▾

Friday, March 11
7:15am   GR - The Techie Anesthesiologist - L. Xia
10:00am   AHD - Regional Day - C. Lacny & J. Larson
1:00pm   AHD - Regional Day - D. Lee & J. Larson

Monday, March 14
5:30pm   Trauma Rounds

Tuesday, March 15
Call stipend schedule due in PGME office

Thursday, March 17
5:30pm   Journal Club - N. Vipulananthan / B. Brownbridge

Friday, March 18
7:15am   GR - [Not so] Bloody Easy: When to Pull the Tra
1:00pm   AHD - Orthopedic Part 1 - Limbs & Joints - P. He

Wednesday, March 23
8:00am   Simulator - B. Francis, G. Weisgerber & S. Chon
1:00pm   Simulator - D. Lee, N. Vipulananthan & S. Lee

Friday, March 25
7:15am   NO GRAND ROUNDS - EASTER BREAK
1:00pm   NO AHD - GOOD FRIDAY

Events shown in time zone: Central Time - Regina
Google Calendar

Sharepoint Discussion Board

⊕ new discussion

Recent   My discussions   Unanswered questions   ⋯

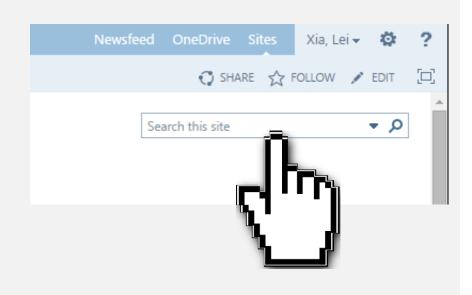There are no items to show in this view of the "Sharepoint Discussion Board" discussion board.

Newsfeed OneDrive Sites Xia, Lei ▾

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🔒 https://share.usask.ca/medicine/itu/Lei/AnesthesiaResidents/_layouts/15/osssearchresults.aspx?u=https%3A%2F%2Fshare

SharePoint

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Anesthesia Residents   Research   Wellness & Career Planning   Leave Management   RPC   ✎ EDIT LINKS

Search

scm

Results found in Anesthesia Residents ▾   Preference for results in English ▾

Result type

Excel

PDF

PowerPoint

Web page

Word

📄 How to Access **SCM** on your Mobile Device

Requirements: Username and password to **SCM** (if you don't have access to **SCM**, please contact your department ... **SCM**.Security@saskatoonhealthregion.ca ...

share.usask.ca/.../IT/How to Access **SCM** on your Mobile Device.pdf

📄 How to Access the Daily Slate on Citrix

Requirements: You must have previous access to ... If you don't, follow the "How to Access **SCM** on your Mobile Device" document ... Step 1: Open the Citrix Receiver app. Click on **SCM** Desktop ...

share.usask.ca/.../IT/How to Access the Daily Slate on Citrix.pdf

Author

Xia, Lei

Lei Xia

McDonald, Andrea

Kumar Amit

Murk, Megan

SHOW MORE

📄 Commonly- Used Abbreviations

Abbreviations as used on the weekly ... Royal University Hospital (location listed after rotation ... Nighttime Call Shift at RUH, 4pm that afternoon to 8am next day **note – in this ... **SCM** ...

share.usask.ca/medicine/itu/Lei/.../Abbreviations.docx

Resident Manual

Academics   8/11/2015 3:32 PM McDonald, Andrea 1.0 ... How to Access Sunrise Clinical Manager (**SCM**) on your Mobile Device   1/19/2015 3:49 PM ... How to Access the Daily Slate on ...

share.usask.ca/medicine/itu/.../Resident Manual/Forms/AllItems.aspx

Modified date

One Year Ago   Today

All

📄 Guidelines for Learners

The Department of Critical Care includes intensivists, nurses, and allied health professionals that you will come across during your rotation in the intensive care unit ...

share.usask.ca/.../Regina ICU Guidelines for Learners - November 20

t	23	Lee, S	Yu, J	cl
w	24	Gill, H	Li, E	jt, ic, kf, db, dw, cl
t	25	Lee, S	Yu, J	jt, ic, kf, db, dw, cy, cl
f	26	Gill, H	Balaton, B	jt, ic, kf, db, dw, cy, cl
s(am)	27	Li, E	Hedlin, P	sl, jt, ic, kf, db, dw, cy, cl
s(pm)	27	Hedlin, P	Jun, A.	sl, jt, ic, kf, db, dw, cy, cl
s(am)	28	Lee, D	Yu, J	sl, jt, ic, kf, db, dw, cy, cl
s(pm)	28	Li, E	Yu, J	sl, jt, ic, kf, db, dw, cy, cl
m	29	Munshey, F	Chan, I	sl, kf, hg
t	1	Yang, C	Boechler, D	sl, kf, hg
w	2	Li, E	Chan, I	sl, jt, kf, hg, dw
t	3	Lo, C	Munshey, F	sl, kf, hg
f	4	Li, E	Hedlin, P	sl, hg
s(am)	5	Lo, C	Magistris, F	sl, hg
s(pm)	5	Munshey, F	Magistris, F	sl, hg
s(am)	6	Lo, C	Yu, J	sl, hg
s(pm)	6	Li, E	Yu, J	sl, hg
m	7	Fedoruk, K	Wiliams, D	hg
t	8	Tuchscherer, J	Munshey, F	hg
w	9	Li, E	Yang, C	ic, kf, hg, dw
t	10	Lo, C	Munshey, F	jt, hg
f	11	Balaton, B	Yu, J	hg
s(am)	12	Francis, B	Lee, D	hg
s(pm)	12	Hedlin, P	Lee, D	hg
s(am)	13	Lee, S	Jun, A	hg
s(pm)	13	Lo, C	Jun, A	hg

	Wkday	Wknd Day	Wknd Night	Total	
RUH					
LO, Calvin - ANES R2	2	2	2	6	vacation
LI, Edmond - ANES R2	4	2	2	8	
TUCHSCHERER, Jon - ANES R5	2			2	
YANG, Churao - ANES 5	2			2	
GILL, Hardave - ANES R4	4	0	1	5	elective
LEE, Stephen - ANES R2	3	2	1	6	vacation
MUNSHEY, Farrukh - ANES R4	5		2	7	
SCH					
CHAN, Ian - ANES R5	2			2	
FEDORUK, Kelly - ANES R5	2			2	
SPH					
BOECHLER, Derek - ANES R5	2			2	
WILLIAMS, Derrick - ANES R5	2			2	
YU, Julie - ANES R2	3		3	6	
OTHER					
BALATON, Breanna - ANES R4	2		1	3	
BOLTON, Tim - ANES R2					
CHOMICKI, Sarah - ANES R2					
COWAN, Jayden - ANES R1					
EIZAHABI. A.J - ANES R1					
FRANCIS, Brent - ANES R3		1		1	
HEDLIN, Peter - ANES R3	1		2	3	
JUN, Andrew - ANES R1	1		1	1	
KOJIC, Stefan ANES R1					
LACNY, Catherine R3					
LEE, Danyela - ANES R3	1	2	1	4	
MAGISTRIS, Fabio - ANES R1			1	1	
McDONALD, Todd - ANES R3					
ORVOLD, Melanie - ANES R2					
SACEVICH, Calen - ANES R3					
VALCKE, Patrick - ANES R1					
VIPULANANTHAN, Nirupan ANES R4					
WEISGERBER, Grahme - ANES R4					
XIA, Lei - ANES R4			1	1	

KOTTER'S 8-STEP CHANGE MODEL

- From "Leading Change" by John P. Kotter published in the Harvard Business Review

MAKE **CHANGE** HAPPEN
with Kotter's 8-Step Model

When you see the need for change in your team or organization, you'll likely be **keen to get moving.**

Follow Prof John Kotter's 8 steps to make sure everything goes **SMOOTHLY**

8. Anchor Change
7. Build on Change
6. Short-Term Wins
5. Remove Obstacles
4. Communicate
3. Create a Vision
2. Form a Coalition
1. Create Urgency

BUT
not everyone will be so **enthusiastic** about your plan.

And you can probably think of new systems **that failed badly when they launched.**

So, look before you leap! If you don't **prepare, you could fall flat on your face.**

STEP 1: CREATE URGENCY

- For change to happen, it helps if the whole company really wants it.

- Develop a sense of urgency around the need for change. This may help you spark the initial motivation to get things moving.

- This isn't simply a matter of showing people poor sales statistics or talking about increased competition. Open an honest and convincing dialogue about what's happening in the marketplace and with your competition. If many people start talking about the change you propose, the urgency can build and feed on itself.

- What you can do:

  - Identify potential **threats** , and **develop scenarios** showing what could happen in the future.

  - Examine **opportunities** that should be, or could be, exploited.

  - Request support from customers, outside stakeholders and industry people to strengthen your argument.

STEP 1: CREATE URGENCY
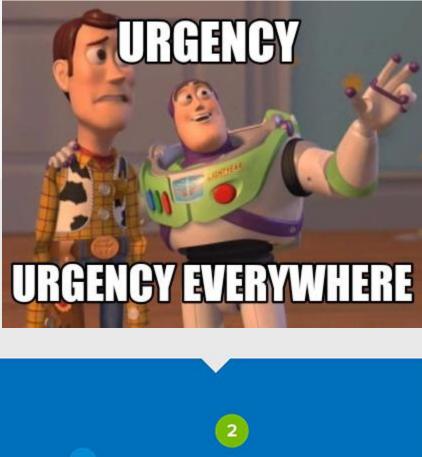

Create Urgency

Get everyone talking about the reasons for change.

- Residents often complained about difficulties with the call schedule. There were always multiple emails with different versions of the call schedule, and sometimes chaos ensued.
- Information overload, and often difficult to find when you needed it.
  - One45, PAWS, UofS CoM website, dropbox, physical binder of information
  - Call schedules, half day material, contact info, harassment policies.
- Information was often outdated or conflicting.
- Accreditation is a great potential threat that can create urgency. (unfortunately)
- What I did:
  - Spoke with fellow residents about the challenges they faced with information overload.
  - Discussed options and a plan for a centralized platform.
  - Spoke with the program administrator about the issues and they agreed change would be good for the program.
  - Spoke with a colleague in the CoM IT department who talked about different tools we could use.

Form a Powerful Coalition

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:

  - Identify the true leaders in your organization, as well as your key **stakeholders** .

  - Ask for an emotional commitment from these key people.

  - Work on team building within your change coalition.

  - Check your team for weak areas, and ensure that you have a good mix of people from different departments and different levels within your company.
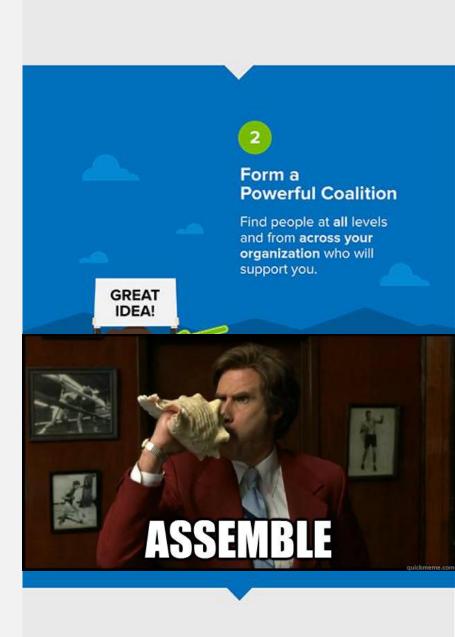
STEP 2: FORM A POWERFUL COALITION

- Your program director is not the only key person for change.

- Determine who in your department holds a lot of sway in making change happen.

  - Often times the program administrator works closely with the program director.

  - A vocal staff member, previous department head, or program director, or well respected resident.

  - The PGME office, RDoS, SHR, or SMA all have influencers who can be helpful.

- They can help to guide you through the bureaucracy and achieve success.

- What I did:

  - I got support from my chief resident and some influential residents.

  - I sold the idea to my program administrator. In turns, she was very supportive, and suggested we create the project and then show it the program director.

  - My program administrator was able to convince the rest of the office staff and the program director to give the project a trial.

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

Create a Vision for Change, and Communicate It

Sum up the difference that your change will make. Be **clear and inspirational** but honest, too.

3 & 4

Remove Obstacles

Quickly tackle any processes or people who might be **blocking change.**

5

STOP

STEP 3: CREATE A VISION FOR CHANGE

- Listen and collect the feedback from everyone involved or affected by the change.

- Create a clear vision about what specifically you are wanting to address, and how you want to achieve it.

- Don't get too carried away with ideas, and try to stay sharply focused.

- What I did:

  - As I talked with fellow residents and office staff, they had lots of suggestions for what this new SharePoint site would contain. I listened to them, and then explained what we would begin focusing on, and the plans to expand later on.

  - We determined the most pressing issues for change, and decided on the call schedule, OR slate assignments, half-day materials, and contact information.

  - I got really good at describing to people what SharePoint was, and why it was good for them. I tailored the messaging to how it would benefit them personally.

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 company, 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:

  - Talk often about your change vision.

  - Address peoples' concerns and anxieties, openly and honestly.

  - Apply your vision to all aspects of operations – from training to performance reviews. Tie everything back to the vision.

  - **Lead by example**.

GREAT IDEA!

YES

Create a Vision for Change, and Communicate It

Sum up the difference that your change will make. Be **clear and inspirational** but honest, too.

3 & 4

STOP

5

Remove Obstacles

Quickly tackle any processes or people who might be **blocking change.**

STEP 4: COMMUNICATE THE VISION

- Find opportunities during the day to share your vision. This can be when there are breaks on rounds, at lunch, in the OR, at academic half-day, or at grand rounds.

- Don't just send out plain emails, because we all know what most people do with emails. Use memes!

- Get your coalition talking and excited about the vision as well.

- What I did:
  - Whenever someone complained about something related to the problems the SharePoint site would help solve, I would tell them how it could be done better.
  - I created a quick mock-up of the SharePoint site, and showed it to residents at half-day.
  - I also showed the mock-up to the program administrator and office staff, and collected feedback from them.
  - I sent fun emails explaining how to access the SharePoint site, and how residents could access it.
  - I found myself repeating the same things over and over again, but the message was getting out.

STEP 5: REMOVE OBSTACLES

- If you follow these steps and 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 staff wants to get busy and achieve the benefits that you've been promoting.

- But is anyone resisting the change? And are there processes or structures that are getting in its way?

- Put in place the structure for change, and continually check 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:

  - Identify, or hire, change leaders whose main roles are to deliver the change.

  - Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.

  - Recognize and reward people for making change happen.

  - Identify people who are resisting the change, and help them see what's needed.

  - Take action to quickly remove barriers (human or otherwise).

Create a Vision for Change, and Communicate It

Sum up the difference that your change will make. Be **clear and inspirational** but honest, too.

3 & 4

STOP

5

Remove Obstacles

Quickly tackle any processes or people who might be **blocking change.**

Create Short-Term Wins

Set small goals that contribute to the big change, so that everyone can see and

6

☑ 01
☑ 02
☐ 03

STEP 5: REMOVE OBSTACLES

- This can feel like the hardest step for most residents, but I believe that's where your coalition can assist you. You can't hire or fire obstacles :(

- Your vocal staff member, program administrator, or program director can speak up on your behalf.

- Consider reaching out to RDoS, the PGME office, or someone in another program to help remove obstacles.

- Don't take no for an answer. Find out the reasons for an answer, and look to work around them.

- What I did:
  - I leveraged my relationship and support from my program administrator to ensure implementation.
  - I asked my colleague in the IT department to create a simple URL (anesthesia.usask.ca).
  - The office and chief resident agreed to just use SharePoint and no longer email out the call schedules.
  - I rewarded my coalition with tech support, and made their jobs easier and more rewarding.

Create a Vision

YOU SHALL NOT PASS!

Short-Term Wins

Set small goals that contribute to the big change, so that everyone can see and

STEP 6: CREATE SHORT-TERM WINS

- Nothing motivates more than success. Give your company a taste of victory early in the change process. Within a short time frame (this could be a month or a year, depending on the type of change), you'll want to have some "**quick wins** " that your staff 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:

  - Look for sure-fire projects that you can implement without help from any strong critics of the change.

  - Don't choose early targets that are expensive. You want to be able to justify the investment in each project.

  - 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.

  - **Reward** the people who help you meet the targets.

Remove Obstacles

Quickly tackle any processes or people who might be **blocking change.**

Create Short-Term Wins

Set small goals that contribute to the big change, so that everyone can see and **enjoy the progress.**

Build on the Change

Practice your new processes to make sure they're solid. Keep looking out for opportunities to **improve even more.**

STEP 6: CREATE SHORT-TERM WINS

- Make sure you can achieve a short-term win quickly and efficiently.

- It doesn't have to be the exact final goal you want to achieve, but more of a proof of concept.

- This should involve minimal effort from those involved, and thus more likely to succeed.

- Get people talking about the short-term wins.

- What I did:
  - I had already created the SharePoint site and made sure it worked to host the call schedule before I approach my program administrator. Therefore, as soon as I got buy-in, we were able to roll it out within the month.

  - I showed the chief how to use the site first, and ensured he was well supported.

  - I also trained the program administrator on how to use the site to their advantage.

  - This created a short-term win for the chief resident and program administrator that carried the project forward.

"WE ARE GOING TO START WINNING BIGLY"

memes.com

Create Short-Term Wins

Set small goals that contribute to the big change, so that everyone can see and **enjoy the progress.**

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Build on the Change

Practice your new processes to make sure they're solid. Keep looking

STEP 7: BUILD ON THE CHANGE

- Kotter argues that many change projects 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 product using a new system is great. But if you can launch 10 products, that means the new system is working. To reach that 10th success, you need to keep looking for improvements.

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

- What you can do:

  - After every win, analyze what went right, and what needs improving.

  - **Set goals** to continue building on the momentum you've achieved.

  - Learn about **kaizen**, the idea of continuous improvement.

  - Keep ideas fresh by bringing in new change agents and leaders for your change coalition.

Build on the Change

Practice your new processes to make sure they're solid. Keep looking out for opportunities to **improve even more.**

Anchor the Change in Your CULTURE

Celebrate and record every success, and recruit and retain people who share your values.

STEP 7: BUILD ON THE CHANGE

- Reinforce the positive effects with your coalition to continuum momentum going forwards.

- Go back to the stakeholders and access the strengths and weaknesses of the short-term win.

- Continue to evolve dynamically.

- What I did:

  - Didn't mention the word Kaizen.

  - Ensured that all the residents were able to access the SharePoint site, and felt well supported.

  - Frequently checked in with residents and office staff about any feedback they had.

  - Continued to add new sections and features to the SharePoint site based on the feedback.

    - Vacation request forms, annual schedule, research area, door access codes, IT how-to guides.

Create Short-Term Wins

Set small goals that contribute to the big change, so that everyone can see and **enjoy the progress.**
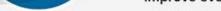
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7

Build on the Change

Practice your new processes to make sure they're solid. Keep looking out for opportunities to **improve even more.**

8

Anchor the Change in Your CULTURE

Celebrate and record every success, and recruit and retain people who share your values.

STEP 8: ANCHOR THE CHANGES IN CORPORATE CULTURE

- Finally, to make any change stick, it should become part of the core of your organization. Your corporate 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 company'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:

  - Talk about progress every chance you get. Tell success stories about the change process, and repeat other stories that you hear.

  - Include the change ideals and values when hiring and training new staff.

  - Publicly recognize key members of your original change coalition, and make sure the rest of the staff – new and old – remembers their contributions.

  - Create plans to replace key leaders of change as they move on. This will help ensure that their legacy is not lost or forgotten.

8

Anchor the Change in Your
CULTURE
Celebrate and record every success, and recruit and retain people who share your values.

WELCOME

Find out more about Kotter's
8-Step Change Model by visiting
www.mindtools.com/kotter

STEP 8: ANCHOR THE CHANGES IN CORPORATE CULTURE

- Embed it into the fabric of the program, and make it something everyone is proud of compared to before the change.

- Target the junior residents to keep the changes going, as they will be the future chiefs in the department.

- Ensure the coalition is self-sufficient and has new leaders, because you won't be a resident forever.

- What I did:

  - The office staff and residents fully embraced the SharePoint concept, and everyone contributed more ideas to make it even better. Even the clinical staff started hearing about it, and they are now being integrated into the site as well.

  - I hand picked a junior resident that I trained to take over my position in championing the project.

  - The defining moment came when after months of preparation for accreditation, I suggested to my program administrator they could just upload all the policies and other information residents are supposed to have access to onto SharePoint.

  - On accreditation day, they just set up a computer with access to SharePoint for the accreditors, and they said the accreditors didn't even open the dozens of binders they put together for them.

  - You know you've made lasting change when the program director sells SharePoint to the accreditors as a cornerstone of residency training.
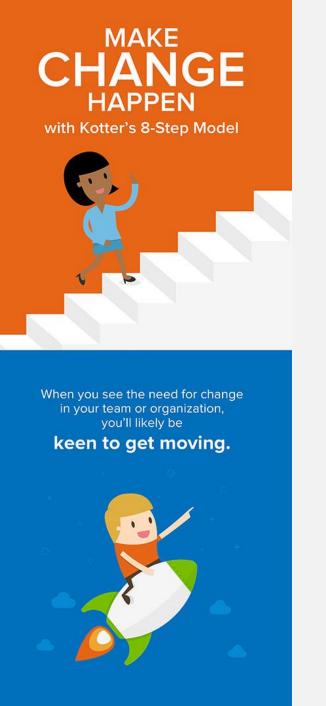
MAKE CHANGE HAPPEN

with Kotter's 8-Step Model

When you see the need for change in your team or organization, you'll likely be

keen to get moving.

Follow Prof John Kotter's 8 steps to make sure everything goes **SMOOTHLY**

8. Anchor Change

7. Build on Change

6. Short-Term Wins

5. Remove Obstacles

4. Communicate

3. Create a Vision

2. Form a Coalition

1. Create Urgency

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BUT

not everyone will be so **enthusiastic about your plan.**

And you can probably think of new systems **that failed badly when they launched.**

So, look before you leap! **If you don't prepare, you could fall flat on your face.**