



UCSF Educational Skills Workshop

Navigating the Organizational Landscape

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Agenda

Introduction Case #1 Four Frames Didactic	8:05-9:15
BREAK	9:15-9:25
Preferred frame self-assessment Case #2	9:25-10:15
BREAK	10:15-10:25
Case #3 Step back consultations	10:25-11:35
BREAK	11:35-11:45
Personal reflection Session evaluation	11:45-12:00

Zoom Reminders

Put questions and
comments in the
chat

During small
groups: camera
ON and mute
OFF

Mono-task until
break times

Ground Rules

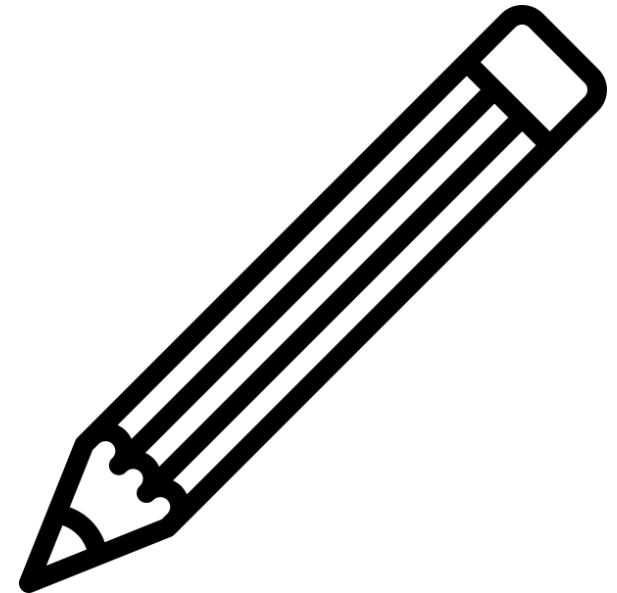
- ▷ Diversity, equity and inclusion work is a lifelong process
- ▷ We don't have all the answers
- ▷ Do not expect to be an expert by the end of this workshop
- ▷ Perfection is the enemy of good
- ▷ Strive for “brave” space:
 - Step up and step back
 - Acknowledge impact
 - Take issue with ideas not with people
 - Approach discomfort with inquiry

Objectives and Disclosures

- Describe four frames for approaching leadership challenges (structural, human resource, political and symbolic)
- Reflect on your personal approach to navigating organizations
- Apply the four frames to educational case studies
- Discuss how issues of diversity, equity and inclusion might be incorporated into this framework

Disclosures: No conflicts of interest

Write down your learning goal...



Created by Creaticca Creative Agency
from Noun Project

Sources of Ambiguity in Organizations

Group discussion:

Why is it difficult to create change in a complex organization?

AND/OR

Why is it difficult to understand how organizations work?

Case 1: Use your natural or preferred leadership style

- Open Case 1 in wiki dashboard
- In your small group,
 - Introduce yourselves
 - Designate a reporter
 - Discuss the questions on the slides and brainstorm strategies to approach this case
 - Create 1 document or slide with 2-4 recommended actions

Case 1: Analyzing an organizational opportunity

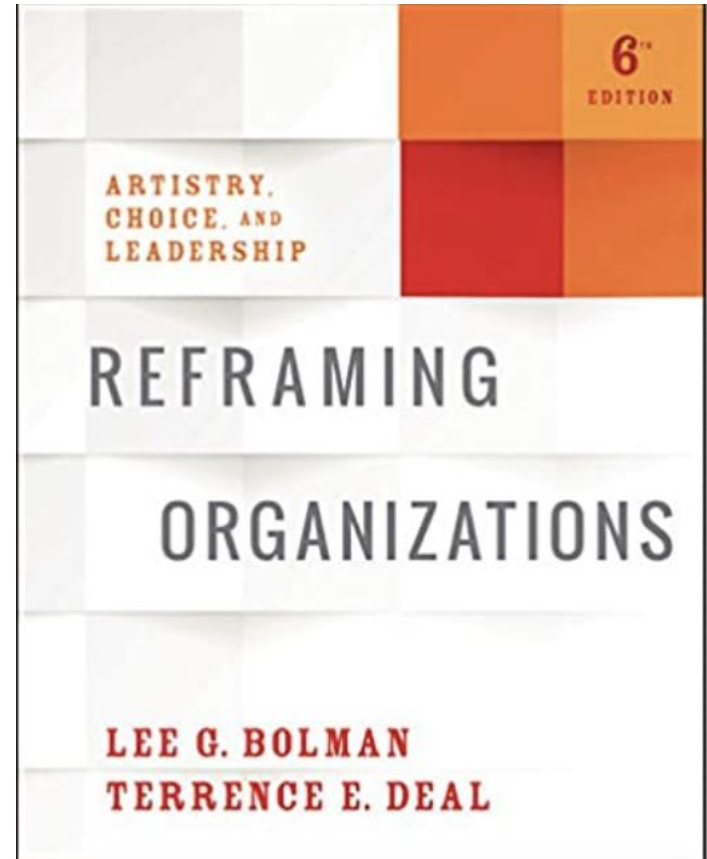
An interprofessional team of providers were asked to create a new interprofessional longitudinal elective involving psychiatric nurse practitioners, physical therapy, and pharmacy residents. The triads of providers were tasked with providing community based primary care to aging adults with severe mental illness at the SF Progress Foundation. This 3-month elective (4 hrs/week) was extremely successful from both patient and caregiver satisfaction scores, as well as patient functional outcomes. At the time the elective ended, the UCSF Health Strategic Plan was unveiled, which highlighted a major initiative to support innovative Behavioral Health initiatives in and around San Francisco. The team of providers were asked to present this initiative to the Provost office to garner financial support for faculty oversight with a goal of gaining support to expand the elective to include a greater number of interprofessional learners within UME (undergraduate health professions).

Questions

- 1) Analyze the situation and consider barriers and facilitators to bringing about the desired change.
- 2) What, if any, framework, helped you to guide analysis and action?
- 3) You are charged with presenting your case to the Provost. Please be prepared to share with the group how you would make your case to the Provost.

Four Frames for Understanding Organizations

- Structural
 - Rules, roles, goals, policies
- Human Resources
 - Relationships, engagement
- Political
 - Power, conflict, competition
- Symbolic
 - Culture, inspiration



Bolman LO, Teal TE. Reframing Organizations: Artistry, Choice and Leadership. 6th Ed. 2017.

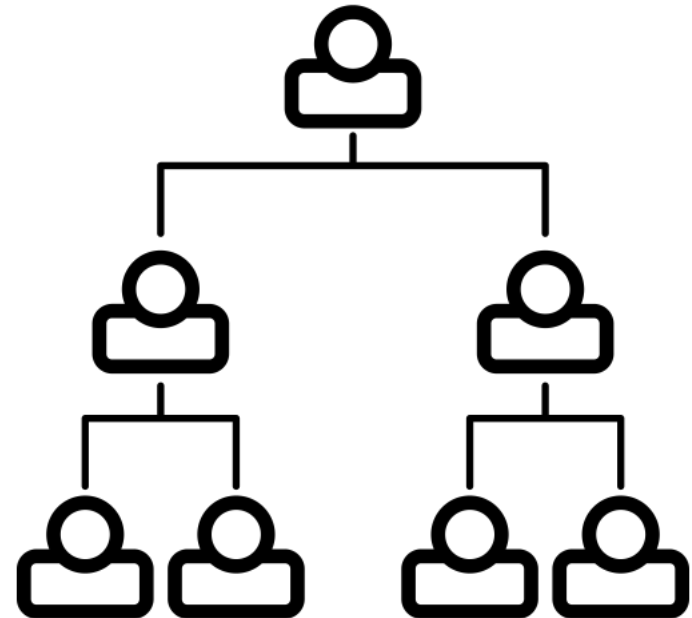
Structural Frame

Focus:

- Rules
- Roles
- Goals
- Procedures

Assumptions:

- Specialization increases efficiency
- Clarity and control enhance performance
- Problems result from structural misalignment



**Created by David Christensen
from the Noun Project**

Human Resource Frame

Focus:

- People
- Talents/skills vital
- Fit

Assumptions:

- Organizations exist to serve individual needs
- People and organizations need each other
- Problems result from HR misalignment



Created by b farias
from Noun Project

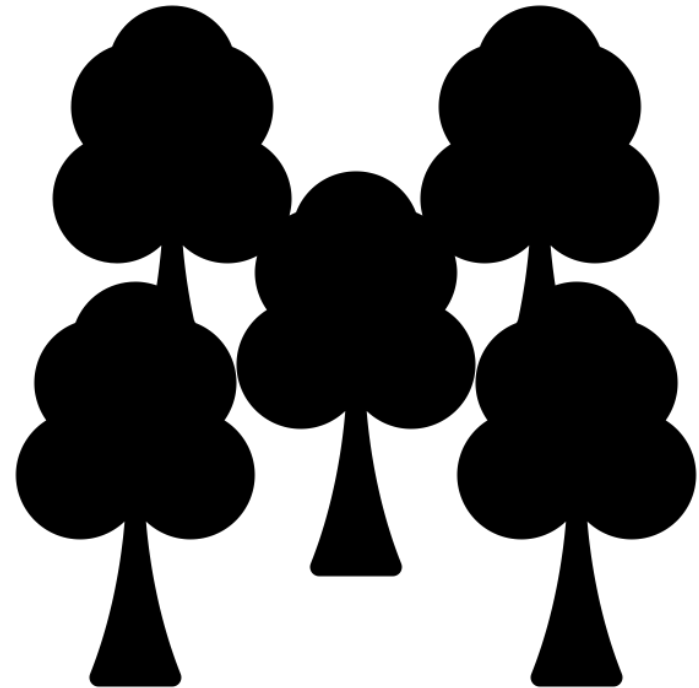
Political Frame

Focus:

- Power
- Competition
- Group and individual interests

Assumptions:

- Resources are scarce
- Differences are enduring
- Key decisions involve who gets what



Created by faisal
from Noun Project

Symbolic Frame

Focus:

- Meaning
- Belief
- Faith

Assumptions:

- Events and activities have multiple interpretations
- Symbolism helps to resolve confusion, find direction, anchor hope
- Culture is the superglue for organizations and people



Created by Raymond
from Noun Project

Academic Leadership

- Building clarity and capacity
 - Leader as analyst and architect (Structural)
- Fostering a caring and productive campus
 - Leader as servant, coach (Human Resources)
- Respecting and managing differences
 - Leader as compassionate politician (Political)
- Keeping the faith and celebrating mission
 - Leader as prophet and artist (Symbolic)

Diversity, equity & inclusion

Structural

Human
Resources

Political

Symbolic

Break

Your Navigation Frames

- Self-assessment of frame orientations:

<https://fs25.formsite.com/josseybass/form29/index.html>

- How do you typically navigate organizations?
- Which frames do you need to use more?

Structural

Human
Resources

Political

Symbolic

Case 2: Use your assigned frame

- Open Case 2 file from wiki dashboard
- In your small group,
 - Designate a reporter
 - Discuss the questions on the slides and brainstorm strategies to approach this case
 - Create 1 slide with 2-4 recommended actions

Case 2

Directions: *When examining the case, consider the following questions from the frame you were assigned (structural, HR, political, or symbolic)*

Dr. Flint learned about a national ABIM pilot program in competency-based medical education that several other institutions used to create a combined fellowship in geriatrics and palliative care. She saw the opportunity to create such a program at UCSF because it has highly-ranked individual geriatrics and palliative care fellowships. However, the two fellowships are based in separate divisions (many other institutions have combined geriatrics and palliative care departments or divisions) with entirely separate leadership, faculty, and finances. While she could easily see that there were enough clinical and educational opportunities to create this new program, she was unsure how to bring the two divisions together to fund two new fellowships slots, a program director position and a collaborative curriculum.

Questions

- 1) Use your frame to analyze the situation and consider barriers and facilitators to bringing about the desired change.
- 2) Use your frame (with a DEI lens) to analyze the situation and consider barriers and facilitators to bringing about the desired change.
- 3) How would multiple frames help guide analysis and action?
- 4) What should be her next set of actions based on your frame? Create a PowerPoint slide or Word Doc with these recommendations to present to the group.

Break

Case 3: Use your assigned frame

- Open Case 3 file from wiki dashboard
- In your small group,
 - Designate a reporter
 - Discuss the questions on the slides and brainstorm strategies to approach this case
 - Create 1 slide with 2-4 recommended actions

Case 3:

Directions: *When examining the case, consider the following questions from the frame you were assigned (Structural, Human Resources, Political or Symbolic)*

Dr. Fernandez is a highly respected researcher and new assistant professor within the Institute of Genetics. They were interested studying the impact of using a virtual (telehealth) genetic counseling program to serve the rural Central Valley population. They believed approximately 30% of their time would be needed outside of their practice to get the program set up (work flow, ramp up, and infrastructure development). The Director of the Institute had 3 other pressing strategic priorities that did not align with this telehealth vision and was quite dismissive of the idea. However, the call for innovative initiatives to build access and service to the underserved regions of California using virtual care was a highlight of the recent state-wide Genetic counseling conference.

Questions

- 1) Use your frame to analyze the situation and consider barriers and facilitators to bringing about the desired change.
- 2) Use your frame (with a DEI lens) to analyze the situation and consider barriers and facilitators to bringing about the desired change.
- 3) How would multiple frames help guide analysis and action?
- 4) What should be Dr. F's next set of actions based on your frame? Create a word doc or ppt slide with these recommendations to present to the group.

Recommended Actions from _____ Frame

Step-Back Consultation

Prep (5 min): choose a problem or opportunity to present

BREAK OUT INTRO GROUPS OF 3

Present (5 min)

- describe the project and/or current problem you are trying to address
- identify facilitators, barriers and resources that might result in improvement, applying the 4 frames as an organizing structure

Clarify (2 min): Listeners ask questions using appreciative inquiry—using active listening and strengths-based positive and curious questions

Discuss (5 min): Listeners reflect on the opportunities and strengths of the project as illuminated by the 4 strengths. Presenter quietly listens to the discussion and does not talk.*

Reflect (1 min): Presenter reflections on what has been discussed

Reflections

Structural

Human
Resources

Political

Symbolic

Self-reflection, evaluation and action plan

Action Plan: Reflect on your leadership frame from most preferred to least preferred and identify one challenge in your current work which you commit to using a different or less preferred orientation. Which frame do you need to use more?

https://ucsf.co1.qualtrics.com/jfe/form/SV_e2wAk27jdunZZWJ

Evaluation Link:

https://ucsf.co1.qualtrics.com/jfe/form/SV_6LvAUx5tuqK5ROJ

Also located on the Workshop Dashboard:

<http://tiny.ucsf.edu/OrgLandscape>