How do we get started in the assessment of EPAs in UME? The use of Kotter’s Change Management to support a process of assessing EPAs.

**Timeline based on Kotter’s 8 Step Change Model (NOTE: elements with asterisk (*) are complete or in progress):**

**Year 1: 2014**

- **Step 1: Create Urgency**
  We began by discussing the concept of EPAs with faculty, staff, administrators, Statewide Campus Assistant Deans, and preceptors.

**Year 2: 2015**

- **Step 2: Form a Powerful Coalition**
  We developed the EPA and Portfolio Advisory Committee consisting of the Associate Dean for Clinical Education, Associate Dean for Assessment and Educational Development, Chair of Clinical Sciences Department, Chair of Basic Sciences Department, Chair of OPP Department, Director of Clinical Education Center, and Assistant Dean for Preclinical Education

- **Step 3: Create a Vision for Change**
  The EPA and Portfolio Advisory Committee worked to develop a vision and strategy to be communicated with faculty, staff, administrators, Statewide Campus Assistant Deans, and preceptors. This process started with an assessment of the organization and environment to determine where EPAs could be assessed across the continuum and pinpoint where data for assessment of EPAs would need to be collected. We specifically reviewed our current labs and OSCEs for elements that would feed into the assessment of EPAs. We also analyzed our stakeholders by surveying the program directors to determine expectations in their specialty for an entering resident that would inform the EPAs for that specialty. (Still in progress)

- **Step 4: Communicate the Vision**
  Once we have the full strategy/vision, we plan to hold workshops with faculty, staff, administrators, Statewide Campus Assistant Deans, and preceptors in April and July 2016 to help create buy-in for the vision and field questions related to the proposed strategies. NOTE: Faculty will have been involved through the identification of areas in the curriculum through all four years that could provide evidence for assessment of EPAs.

- **Step 5: Remove Obstacles**
  After implementation in July 2016 with 3rd year students, we will continue to observe the progress for obstacles or barriers that may be causing problems and address those immediately.

- **Step 6: Create Short Term Wins**
  We will identify strong partners to implement the assessment process in 3rd year and work closely with them to ensure success. The planning will be critical to ensure we are focusing on small benchmarks in the process so that individuals can see success in the process. We will start with only a few relatively easy activities and then progress to more difficult EPAs to observe.

**Example of one EPA that we are currently reviewing for inclusion:**

**Year 3: 2016**

- **Step 7: Build on Change**
  We will incorporate continuous quality improvement by building in assessment of the process to determine what went right, what didn’t go right, what needs to be changed, set goals for moving forward to continue building on the assessment of EPAs and the use of portfolios for this assessment.

- **Step 8: Anchor the Changes in Corporate Culture**
  We plan to ensure that the change is seen in all areas of the organization. Successes will be reported to the Curriculum Committee to ensure that progress is heard on a continuing basis. Best practices will be shared not only internally but also externally at conferences to help others in the process. We will make great strides to work with the allopathic organizations who are probably a step ahead of us to gather new tools and strategies for improving our process. The key leadership will be reviewed to see if new players need to be added to keep the momentum going forward.

**Critical Success Factors to Consider:**
- Faculty Development
- Level of Trust
- Survey of Stakeholders
- Create a timeline, vision, strategy and follow it
- Include key players from important areas (e.g. clinical education center, clinical skills coordinator, regional assistant deans, etc.)

**What are other critical success factors you have found? Write them below.**