

GLOBAL LEADERSHIP MODEL FOR HEALTH PROFESSIONS EDUCATION PART 2: TEACHING/LEARNING METHODS

Abstract

In this application paper, we present an analytical process to identify teaching/learning (T/L) methods used in leadership education. Applying this process to a global program for leadership development of healthcare professionals, we highlight nine methods that teachers most often used, and learners viewed as most impactful. Seven of the pedagogies identified were aligned with literature, indicating the applicability of the process for leadership education in general. We identified two methods that had not been previously or explicitly described and that learners validated as important: building a respectful and inclusive environment and sharing personal narratives. These methods appear critical for success in a diverse group of learners. The process we describe for analyzing T/L methods will be a useful addition for designers of leadership development programs.

Issue Statement

Numerous leadership development programs have arisen to fill the gap of leadership in healthcare, and research on their effectiveness has been published (Burdick, Amaral, Campos, & Norcini, 2011; Gentry, Eckert, Stawiski, & Zhao, 2016; Gilmore, 2010; Ladhani et al., 2015; Magrane & Morahan, 2016; Steinert, Naismith, & Mann, 2012). However, there have been few descriptions of specific teaching/learning (T/L) pedagogies used in leadership development courses in general (Jenkins, 2012; 2013; 2016) or in healthcare leadership programs. The literature has focused on content, competencies, instructional design, learner assessment, and program evaluation studies (Campos, Friedman, Morahan, De Campos, & Haddad, 2013; MacPhee, Chang, Lee, & Spirl, 2013; O'Connell & Pascoe, 2004; Pfeiffer et al., 2013; Wiseman, Bradwejn,

& Westbroek, 2014).

In this application paper, we describe a process to analyze the specific T/L pedagogies used by the well-established and evaluated FAIMER Institute (the Foundation for Advancement of International Medical Education and Research) for international health professions educators (Burdick et al., 2010). The FAIMER leadership curriculum theme is one of five in the program; its unique features, challenges, and sustainability issues were described previously (Ladhani et al., 2015). We initiated this application with two major aims. First, we aimed to see whether the T/L methods identified by Jenkins (2012; 2016) were generalizable to a global leadership curriculum for midcareer health professions faculty. Second, we performed this case study of a practice to show how leadership educators can analyze specific T/L methods

in their leadership curricula; determine whether the learners and faculty have the same perception of which methods are most impactful; and determine whether certain T/L methods are over- or underused in their program. Leadership educators in various sectors—university, community, corporate, public—may find it useful to implement this analytical practice of identifying T/L methods and checking the results by obtaining the viewpoints of learners and users.

Overview of Related Scholarship in Leadership Education

Prideaux (2003) advises when planning any curriculum that the faculty align four critical elements – purpose, objectives, T/L methods, and evaluation process. Curriculum design should be intentional and the choice of T/L methods and the skill of the instructor are equally important. The instructor is expected to be both knowledgeable in the subject and capable in teaching and facilitating, to encourage and support and at the same time challenge learners' growth (Guthrie & Jenkins, 2018).

Recently, Guthrie and Jenkins (2018) used these concepts in outlining a framework for leadership education curricula. The framework includes knowledge, development, training, observation, engagement, and metacognition and the appropriate T/L methods for each. Knowledge about leadership is the bedrock of leadership teaching and learning, and forms the circle surrounding the five educational elements. Guthrie and Jenkins (2018, p.57) assert that "development, training, observation and engagement all contribute to [the] metacognition" necessary to be a mindful leader.

Allen and Hartman (2008) were early researchers who identified specific T/L methods used in leadership education. Jenkins (2013) subsequently conducted a national survey that identified 24 specific T/L methods used in undergraduate and online leadership courses

in the United States. The results showed that class discussion, interactive lecture and discussion, and group discussion were the most commonly used T/L methods.

The educational setting we describe in this application paper is the FAIMER leadership curriculum, which has incorporated many of the concepts discussed above. The curriculum has well-enunciated competencies and objectives and uses the principles of transformational learning; it intentionally includes an array of T/L methods to reach its objectives (Ladhani et al., 2015). This application paper describes in detail the intentionally planned FAIMER leadership curriculum design (sequence and learning focus level); content (topic and learning objectives); and specific pedagogical T/L methods.

Description of the Application

Analytical Process. We developed a list of the 11 topics that encompassed the "leadership and management" curriculum theme. Table 1 summarizes the blueprint for these topics, the learning objectives, and the focus (from individual to global community of practice) (Wenger & Snyder, 2000). The topics are listed by their sequence in the curriculum within year 1 and year 2. The program was intentionally designed to foster transformational learning, enabling reinforcement and deepened learning as the curriculum progresses.

Table 1.
FAIMER Leadership Curriculum: Design, Learning Focus, and Content.

Topic, Sequence, Learning Level, and Focus	Session Purpose and Objectives
Starting the journey (Y1: self, others ^a)	<ul style="list-style-type: none"> • Begin developing a community of practice with other fellows • Use several interactive exercises useful in fellows' professional settings
FAIMER "learning and leadership" model (Y1: self, others)	<ul style="list-style-type: none"> • Explain underlying theory and eight principles that are the foundation for the "leadership and management" curriculum theme • Describe concepts and strategies for transformational learning experiences • Describe five levels of learning that affect the fellows' professional lives as health professions educators • Describe how Y1 and Y2 sessions fit into the five learning levels
Leadership in the 21st century (Y1: self, others)	<ul style="list-style-type: none"> • Reflect on one's leadership strengths and apply in one's professional life • Describe similarities and differences between leadership and management, when to use each, and why both are essential • Describe a leadership model that integrates appreciative, positive, strengths-based, and collaborative leadership approaches, community of practice concepts, and the "leadership and management" foundation
Difficult conversations and managing conflict (Y1: self, others)	<ul style="list-style-type: none"> • Describe root causes of misunderstandings that lead to difficult situations • Reflect on ways of handling conflict and how conflict has affected one or one's relationships with others • Apply a model for managing difficult conversations with others
Managing small group collaboration and teamwork (Y1: teams)	<ul style="list-style-type: none"> • Define an effective small group; recognize when group performance is more effective/efficient than individual work • Describe roles and skills that contribute to effective small groups; analyze ineffective work and identify the causes • Describe the stages of small group work, and identify actions to move groups through the stages • Describe characteristics of a high-performing team • Understand seven lenses (Drexler-Sibbet Team Performance Model, n.d.) teams must consider for ongoing performance • Identify leadership behaviors that contribute to team performance
MBTI: Understanding your leadership style (Y1: self, others, teams) Skills for change agents (Y1: self, others, teams)	<ul style="list-style-type: none"> • Provide a theoretical overview of the Myers-Briggs Type Indicator (MBTI) • Validate the results of the MBTI instrument for self (CPP—The Myers-Briggs Company, n.d.) • Identify individuals' type preferences • Capitalize on individual leadership strengths and the strengths of colleagues • Outline FAIMER's eight principles for being a successful change agent (Ladhani et al., 2015) • Understand and manage phases of the change process • Use tools that can assist in managing change and decrease resistance • Plan activities to implement fellowship project; organize into a Gantt chart • Use Grove Graphic Game Plan (Grove Tools, 2017) as a tool for effective project management
Learning circles (Y1 and Y2: self, others, national and international communities of practice)	<ul style="list-style-type: none"> • Use appreciative interviews to understand oneself better, through storytelling and deep listening process • Appreciate at a deep level fellows' commonalities and cultural differences • Exhibit new understanding and connection with the other fellows in the learning circle community (Ahmed et al., 2014) • Reflect upon and build a trust-based community that supports fellows socially and emotionally as well as intellectually (Wenger & Snyder, 2000) • Describe the learning circle process, including development of skills in listening and dialogue • Use "appreciative inquiry" (Cooperrider & Whitney, 2001) and dialogue skills, after having experienced them • Replicate processes used in the FAIMER Institute to build a community of practice in fellows' own schools (Wenger & Snyder, 2000)
Strengths-based leadership (Y2: self)	<ul style="list-style-type: none"> • Use Values in Action instrument (2017) to identify five core character strengths and linkage to behavior • Understand how individual strengths combine in powerful ways • Apply new knowledge of strengths to maximize contribution
Managerial leadership (Y2: others)	<ul style="list-style-type: none"> • Explain the concept of managing the "monkey" and how it relates to delegation of responsibility; development of direct reports, students, and colleagues; and shifting accountability for areas of responsibility (Oncken & Oncken, 1984) • Assess risk associated with work situations, and use appropriate leadership behaviors to manage • Identify what the organization needs to provide to increase probability of successful delegation • Understand and practice three behaviors of managerial leadership: challenge, support, and direction
Sustaining change (Y2: teams, organization)	<ul style="list-style-type: none"> • Experience one type of strengths-based change—appreciative inquiry (Cooperrider & Whitney, 2001) • Identify specific tools to sustain, institutionalize, or expand current educational change projects • Understand ways to effectively build and add team members to help sustain and/or institutionalize fellowship projects • Clarify individual vision and Y2 project goals • Integrate leadership and management strategies into Y2 project plans, especially institutional and faculty engagement for educational reform • Integrate scholarship and research strategies into Y2 project plans • Develop Y2 project implementation plans, including application of strategies/concrete steps to achieve the desired change • Communicate project plans in a succinct manner

Note. FAIMER = Foundation for Advancement of International Medical Education and Research. Y1 = year 1; Y2 = year 2.
aLevels of learning focus = self, others, teams, organization, and national/international communities of practice.

To identify T/L methods, we first reviewed and selected methods from those described by Jenkins (2012; 2016), revising the list to reflect the specific pedagogy used in our course. Eventually we developed a list of 28 T/L methods, including 22 from Jenkins' papers and six from our curriculum that did not appear to be explicitly included in the previous studies. Next, we created an analytical matrix template with the 11 topics and the 28 T/L methods. Three of the authors (HS, ZL, & PM) individually completed the matrix, assigning a check to each cell that included a specific T/L method used in teaching a specific topic. Where the three authors found differences, we discussed the meanings and continued to revise the glossary (Table 2). We deliberated extensively while

preparing the glossary, comparing with the earlier published glossaries (Jenkins, 2012; 2013; 2016), and revising to align with the actual T/L processes used in our curriculum. The fourth author (RW) was the final reader, who proposed minor changes in the glossary. The iterative process produced a common language through explicit clarification of specific T/L methods used; this language can now be applied to the other curriculum themes in our leadership development program. Finally, to determine the learners' perceptions of the usefulness and impact of the T/L methods, we conducted inquiry sessions with fellows from the 2015 through 2018 classes (three of the 18 classes since 2001).

Table 2.
Glossary of Teaching/Learning (T/L) Methods^a.

Teaching/Learning Method	Description
Building a respectful learning environment ^b	Instructor uses pedagogies that promote a safe environment for learning where learners feel included, visible, and heard and their perspective is valued
Interactive lecture/ class discussion	Instructor intersperses lecture with facilitated sustained conversation and/or question-and-answer segment with the entire class
Reflective journals/facilitated reflection	Learners develop written reflections on their experiences
Group collaborative work, with oral/visual presentation	Learners work collaboratively on a prescribed task/project and present in a small group
Sharing personal narratives ^b	Learners invited to share personal experiences to know their peers in a deeper way
Individual leadership/ management plan through a project	Learners develop specific goals and vision statements for individual leadership development, often through an action project
Short writing	Learners complete ungraded writing activities to enhance learning of module concepts
Storytelling	Learners listen to a story highlighting some aspect of leadership, often told by an individual with a novel experience
Team building	Learners engage in group activities that emphasize working together in a spirit of cooperation (e.g., setting team goals and priorities, delegating work, examining group relationships and group dynamics)
Individual: oral/visual presentations ^b	Learners present work to a group and receive feedback
Self-awareness and self-assessment instruments	Learners complete questionnaires or other instruments designed to enhance their self-awareness in a variety of areas (e.g., MBTI and the Values in Action instrument).
Class polls and surveys	Learners complete classroom polls and/or daily online surveys designed to collect data on content topics and T/L effectiveness
Demonstration ^b	Facilitator shows by reason/proof, explains/illustrates by use of visual example, often followed by learner practice
Problem solving in specific situations (projects)	Learners acquire leadership skills through practice, often using an action project
Role-play activities	Learners engage in an activity acting out a set of defined role behaviors or positions with a view to acquiring desired experiences
Student peer feedback or evaluation	Learners critique peers' work using previously described criteria and provide specific suggestions for improvement
Media clips	Learners acquire knowledge of leadership theory and topics through film, television, or other media clips
Consultation with experts ^b	Learners seek advice or information from an expert, with a view directed to some future course of action
Ice breakers	Learners engage in a series of relationship-building activities to get to know one another
Research/ scholarship project/presentation	Learners actively engage in research, presenting findings in oral or written format
Student peer teaching	In pairs or groups, learners teach designated course content or skills to peers
Games	Learners engage in a prescribed setting constrained by a set of rules and procedures
Simulation	Learners engage in an activity simulating complex problems/issues and decision-making
Scavenger hunts	Learners find and discuss resources or accomplish a set of tasks (face to face or online)
Guest speaker ^b	Learners listen to a guest speaker discuss his or her personal leadership experiences
Service learning or philanthropic projects	Learners participate in a service learning or philanthropic project
Interview of leader	Learners observe or interview an individual leading others, either effectively or ineffectively, and report their findings to the instructor and class
Exams	Learners complete tests or exams intended to assess subject matter mastery

Note. Note. ^aMany of the T/L categories originated from Jenkins (2012; 2013; 2016); the definitions have been adapted to the program for midlevel faculty. They are presented in order from most to least frequently used. ^bT/L method that was not in the Jenkins (2012) list..

Specific T/L methods identified. Figure 1 provides a frequency analysis of the 28 specific T/L methods (Table 2), showing the 25 that we found were used in the leadership and management curriculum over the 11 leadership and management topic sessions in the curriculum (Table 1).

The analysis revealed that the T/L method described as “building a respectful learning environment” was used in all sessions, with instructors embedding various processes to achieve such an environment. Specific methods to foster respect and inclusion of all participants included instructors asking all to use first names rather than titles; instructors asking all to speak slowly so that everyone could understand (especially those whose first language was not English); participants co-developing group norms; faculty and groups showing all information on flip

charts in order to show that everyone’s contributions were valued; instructors placing tables in the room in a diamond format so that everyone could see everyone else; and instructors intentionally changing group memberships throughout the program so that participants engaged as a total cohort. The faculty modeled and taught respectful and positive dialogue rather than using common academic debate discourse (Yankelovich, 2001). This approach fostered student engagement even when a topic created discomfort.

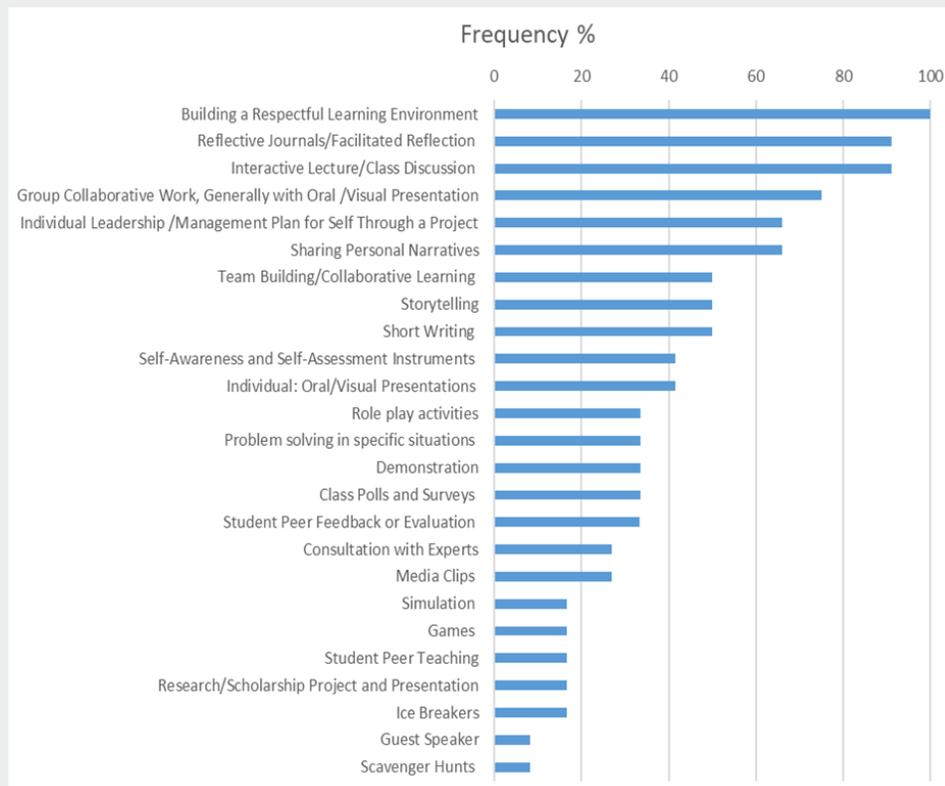


Figure 1. Frequency analysis of specific T/L methods used in the leadership and management curriculum sessions. Note. *100% = use of the specific T/L method in all 11 of the leadership and management curriculum sessions..

Another three T/L methods—interactive lecture and class discussion; reflective journaling and facilitated reflection; and group collaborative work—were used very frequently (in more than 75% of the sessions). Numerous structured interactive processes were included in the “interactive lecture and class discussion” T/L method. Sometimes the lecture was a short, informational individual or group assignment that involved methods such as “think-pair-share” or “buzz groups” (Lyman, 1981; Weimer, 2012). To deepen the interactive presentations, we adapted what we term a “gallery walk” (e.g., posting of flip-chart diagrams of projects in progress) and a “thumbprint tour” (a gallery walk in which participants post a flip chart with requests for specific advice or help, and peers and faculty write anything they can provide to move the project forward). The “reflective journaling and facilitated reflection” T/L method included a protected time each day for a structured reflection based on that day’s session. Group collaborative work was used in almost every session, usually involving a visual or oral presentation.

Another five T/L methods were used in half or more of the sessions: sharing personal narratives; individual leadership/management plan using a project; storytelling; short writing; and team building. Another seven were used in 33% to 45% of sessions: individual oral/visual presentations; completion of self-awareness and self-assessment instruments; class polls and surveys; demonstrations; problem solving in specific situations (primarily related to the curriculum innovation projects); role-plays; and student peer feedback and evaluation. Two T/L methods were used in a quarter of the sessions: media clips and consultation with experts. Analysis revealed that the remaining seven were used infrequently: ice breakers; research projects and presentations; student peer teaching; games; simulation, scavenger hunts; and guest speakers. Some methods identified in previous studies (Jenkins, 2012; 2016), such as service learning, exams, and interviewing a leader,

were not used.

Perceptions of participants about impact and usefulness of T/L methods. We explored the importance and usefulness of the T/L methods to the learners. For year 1 participants, we conducted a small group activity asking them to describe a personally transforming experience in the first ten days. For year 2 participants, we conducted a “synthesis and application of T/L methods” session on the last day, which included a slide show covering the T/L methods used throughout all five curriculum themes in the institute. We then asked small groups to identify which T/L method was the “most impactful and most useful” to add to their own teaching repertoire at their home institutions.

Classes over the past three years have commonly cited four specific T/L methods as most impactful and useful: building a respectful and inclusive learning environment (e.g., listing some T/L elements such as the “low tech” method of using flip charts to make visible the contributions of all); interactive discussion (especially think-pair-share, jigsaw design, and gallery walk); reflection; and sharing personal narratives (mentioning especially the learning circles) (Ahmed et al., 2014). The fact that these T/L methods appear among the top five in our T/L frequency analysis for the “leadership and management” curriculum theme (Fig. 1) provides evidence of alignment of the learners’ perceptions with the curriculum T/L pedagogical plan. Another six T/L methods were mentioned by one or two classes: group collaborative work with reports; project-based individual development plan; team building; the MBTI self-assessment instrument; demonstration followed by practice; and role-play activities.

Discussion

Our results describe a practice that leadership educators can use to analyze specific T/L methods

in their leadership curricula, identify how often each is used, and determine whether learners and faculty have the same perceptions regarding which methods are most effective. This practice validated published survey studies on T/L methods that faculty use in teaching in undergraduate and graduate classrooms and distance leadership courses (Guthrie & Jenkins, 2018; Jenkins, 2012; 2013; 2016) and demonstrated the usefulness of these T/L methods in a successful global midcareer leadership development program (Burdick et al., 2010; Ladhani et al., 2015).

Besides extending to a global midcareer program and to health professions educators, we extended the previous studies (Jenkins, 2012; 2013; 2016; Guthrie & Jenkins, 2018) in two other ways. First, the identification of T/L methods frequently used correlated with direct reports from participants about which T/L methods they viewed as most impactful and useful. This finding provided more specificity to the positive self-evaluation learners gave the “leadership and management” curriculum theme (Ladhani et al., 2015). A limitation of our findings is that the learners’ positive evaluations could also be related to other curriculum elements such as sequencing, contents and design (Ladhani et al., 2015).

Second, the analysis revealed two frequently used T/L methods—building a respectful learning environment and sharing personal narratives—not previously explicitly identified in the leadership education literature. We have found that sharing personal narratives is a powerful way of building a trust-based community of practice (Ahmed et al., 2014). Shulman (2005) has explained that effective pedagogies are those that promote a safe environment for learning, incorporate active learner participation, engage students deeply, and promote a learning environment where students feel visible (making it hard for learners to “disappear” and become anonymous). The literature reports that safe learning environments are essential in transformational learning (Frenk et al., 2010; Zaidi, Vyas, Verstegen, Morahan, Dornan,

2017). This T/L method is also consistent with appreciative pedagogy and andragogy concepts for adult learning (Johnson, 2014; Yballe & O’Connor, 2000). Recent reports have also emphasized that a safe and nonthreatening learning context is a key feature for integrating recognition and management of implicit bias into health professions education. This situation is inherent to an international program (Sukhera & Watling, 2017), as is becoming skilled and versatile using both independent and interdependent leadership approaches (Markus & Conner, 2013). Several scholars have noted the importance of a “brave environment” for leadership education, viewing this as a step beyond a “safe” environment that encourages learners to reflect even when there is unease and to grow from it (Arao & Clemens, 2013; Guthrie & Jenkins, 2018).

A variety of specific processes—seemingly minor details—appear to be critical in promoting interactive discussion in a respectful, inclusive environment that engages learners and promotes critical thinking. Regarding the teacher component, studies have shown that a teacher who supports and yet challenges and is a skilled and well-informed facilitator capable of maintaining the focus and relevancy is critical for generating meaningful dialogue and discussion (Guthrie & Jenkins, 2018; Yankelovich, 2001; Zaidi et al., 2016). We also found that methods such as think-pair-share, “snowball,” and “buzz groups” were effective T/L methods for enhancing interactivity while promoting a safe environment (Lyman, 1981; Weimer, 2012).

Regarding the student experience component, during the face-to-face sessions conscious efforts were made to join fellows who came from diverse backgrounds yet had common characteristics or experiences in small group discussions; small group membership was rotated frequently. Within the small groups, self-assigned roles such as timekeeper, discussion leader, notetaker, and reporter were made explicit. Regarding the physical facility component, seating

arrangements were designed to maximize contact and visibility; room size and other logistics were considered for optimizing comfort and audibility.

The study revealed that reflection and interactive discussion were two other very frequently used T/L methods, occurring in 90% of the sessions (Figure 1). Jenkins and colleagues have also reported that use of discussion and reflection are common in leadership education (Jenkins, 2012; 2013; 2016; Guthrie & Jenkins, 2018). Reflection is noted as an important pedagogical technique that encourages learners to integrate concepts into their own thought patterns, experiences, feelings, and beliefs; the method allows considering of alternative perspectives and leads to critical thinking and self-development (Burbach, Matkin, & Fritz, 2004; Buschlen & Guthrie, 2014; Frenk et al., 2010). Interactive discussion has been identified as the signature pedagogical method used in leadership training (Jenkins, 2012; 2013; 2016), because of its impact on the participant (Dudley-Marling, 2013), moving him or her from passive to active learner (Almagno, 2017).

Beyond the top three T/L methods identified in this study, five others previously reported (Jenkins, 2012; 2013; 2016; Guthrie & Jenkins, 2018) were used in many sessions: group collaborative work, individual leadership development plans in conjunction with an action project, short writing, storytelling, and team building.

Reflection for Future T/L Improvement in Leadership Education

The analysis enabled us to ascertain which T/L methods are so critical that they need to be integrated throughout the FAIMER Institute leadership curriculum sessions even more intentionally and which others may be incorporated more frequently to avoid overuse of some T/L methods. We are currently exploring inclusion of three additional methods.

Another long-standing successful leadership development program in health professions makes extensive use of “interviewing leaders” (Magrane & Morahan, 2016). Our participants, in the daily surveys and focus group evaluations, have requested greater use of “peer teaching” to share their expertise and experience. Participants have also welcomed “guest faculty” participation in a few sessions.

For leadership educators in general, this analytic practice can be instructive in improving leadership courses to incorporate an optimum array of T/L methods. Additionally, a salient outcome of the current analysis was development of a common language through the explicit clarification of the T/L methods used.

Summary and Recommendations

This application process for analyzing the frequency and impact of T/L methods will be useful for designers of leadership development programs, especially those with a diverse group of learners. The analysis enables leadership educators to:

- Highlight the range of pedagogies used, and identify those learners view as most impactful.
- Demonstrate which T/L methods aligned with literature are useful in their setting; in this study we demonstrated usefulness of certain T/L methods that span undergraduate to midcareer healthcare professionals in a global setting.
- Identify new T/L methods not previously explicitly identified; in this study we identified building a respectful and inclusive learning environment and sharing personal narratives as critical for success for programs with diverse learners.

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