UCSF Bridges Curriculum Charge Document
Project Strand: Clinical Microsystems Clerkship (CMC)
Faculty Lead: Anna Chang, MD

Background and Purpose:
By way of this charge document, the UCSF Office of Medical Education is defining the scope of work and deliverables for the Clinical Microsystems Clerkship Group. This charge document appoints Anna Chang, MD as the Faculty Lead of the Clinical Microsystems Clerkship Group. In addition, the charge provides guidance on roles, processes, and deliverables through June 30, 2015.

The purpose of this group is to design, develop and plan the implementation of the CMC curricular element for the Bridges Curriculum. These experiences will take place throughout the Foundations I phase of the Bridges Curriculum. The first class to fully participate in this new curriculum will enter UCSF in 2016.

The educational goals of the UCSF Bridges Curriculum include standardized outcomes with individualized pathways: students must master the competencies needed to perform well in their internship but should have the opportunity to tailor their educational experience based on career interests and unique needs. The work of the CMC group directly supports the successful completion of Bridges Project Goal 1, Objective 1.1.

Goal 1: Begin medical school with each student assigned to a clinical microsystem in a new authentic role: the student systems partner, who is prepared and committed to add value to the system’s efforts to improve health outcomes.

Objective 1.1. Design, pilot, refine, implement and evaluate longitudinal immersive workplace learning experiences for interprofessional Student Improvement Teams with students as systems partners for early (Med 1 and 2) students.

Please take a minute to review the comprehensive Bridges Curriculum Charter in Appendix A prior to your group kickoff meeting and share the charter with group members.

CMC Group Goal:
The goal for the group is to produce a blueprint, curriculum plan, implementation plan and learning activities for the Clinical Microsystems Clerkship thread of the Bridges Curriculum.

Deliverable Process Map
**Faculty Lead:** Anna Chang, MD

**Working Group(s) Team Members:** Cindy Lai, Lee Atkison-McEvoy, Leah Karliner, Christina Cicoletti, Allison Ishizaki

**Final Deliverable Approvals:** Faculty Lead, Anna Chang, MD

**Deliverable 1.1 Blueprint (due October 1, 2014)**
A blueprint of the CMC curriculum including a set of guidelines that define the CMC requirements for all students across the Foundations I phase of the Bridges curriculum.

**Blueprint Quality Criteria:**
The final blueprint deliverable must include the following elements as outlined in the [template](http://meded.ucsf.edu/bridges):

- Goals and purpose of the Clinical Microsystems Clerkship
- Documentation of where CMC elements integrate into the Bridges Curriculum Phases (FI, F2, Career Launch)
- Defined set of requirements for completion of the CMC curriculum for all students, including specialized programs
- Glossary of terms (e.g. systems skills, workplace learning, etc.)
- Design criteria for each curricular element (e.g. time allocation, longitudinality)
- Documented interdependencies and contingencies with other curriculum elements (e.g. contingent on Foundations I work)
- Documented having vetted recommendations with key stakeholders (required: Curriculum Dean)
**Deliverable 1.1 Curriculum Plan** (Draft due October 30, 2014, final due December 31, 2014)

A curriculum plan for the Clinical Microsystems Clerkship, including goals, competencies, learning objectives, learning strategies, assessment methods and CMC element milestones for the Foundations I phase.

**Curriculum Plan Quality Criteria:**

- Follows the designated [template](#) linking the CMC element to graduation competencies
- Uses Medbiquitous terminology to identify assessment tools and learning activities.
- Clearly identifies those milestones that require classroom learning (broadly defined) and those which will occur through experiential learning
- Provides flexibility in types of learning activities for workplace learning
- Defines assessment targets and milestones and identifies relevant assessment types,
- The curriculum can be delivered in the time allotted (8 hours per week) for CMC in F1
- Before December 31, 2014, curriculum recommendations have been vetted with key stakeholders (F1 leaders, assessment group, current FPC leaders, Curriculum Dean, and faculty)
- Before December 31, 2014, a communications plan for disseminating the completed deliverable, including the framework for dissemination, list of stakeholders, proposed channel of communication (e.g. town hall, newsletter, etc.), developed in collaboration with Project Manager
Separate implementation plans for the new CMC activities of the curriculum for the 2015/2016 year and the 2016/17 that describe how the CMC elements will be operationalized and integrated into the overall curriculum for each academic year.

**Implementation Plan Quality Criteria:**
- An overall timeline for delivering CMC activities and strategies for the 2015/16 rollout and the full rollout in 2016/2017
  - a. a transition plan for integrating new and enduring curriculum, including integration into special programs (MSTP, PRIME, etc.)
- Identification of implementation interfaces (contingencies)
- A risk assessment highlighting potential risk of changes or roadblocks that may arise and contingencies for problems
- An operational plan for the governance and administration of the CMC that includes infrastructure needs, faculty and staff resources, technology support, committee reports, etc.
- A leadership and governance plan for learning activities including:
  - a. job descriptions and selection criteria for faculty/clinical leadership, including Site Directors
  - b. a recruitment plan for faculty/leaders
  - c. workplace site/projects descriptions
  - d. a recruitment plan for sites
- Collaborate in developing an assessment of faculty readiness and recommended plan for faculty development for new curriculum (Charged to faculty development group)
- Collaborate in developing a recommended plan for integration of interprofessional education (Charged to SOM IPE team from CMC, and only for 2016/17 plan)
- Collaborate in developing a recommended communications plan for CMC implementation (with Project Manager)
- Collaborate in developing a program evaluation strategy (Charged to evaluation and assessment group, only for 2016/17 plan)
Deliverable 1.1 Learning Activities (due June 30, 2015, dates to be broken down further for 2015/16 and 2016/17 activities)
A developed set of CMC learning activities to be implemented in the fall of 2016.

Learning Activity Development Quality Criteria:

- Defined learning objectives for all CMC learning activities
- Defined centralized classroom vs work place learning activities
- Completion of clinical leadership and site selection/recruitment
- Defined grading strategies and supporting technology for students
- Documented policies and procedures for students, including grading requirements and student guidelines
- Completed plan for assigning students to their designated clinical sites/teams

Required activities during each phase of deliverable development:

- Hold kickoff team meeting including Bridges Project Manager, Lindsey Cannon, following an agenda that includes all topics outlined in the template
- Complete a project plan including a project timeline and identified working groups
- Establish and document roles and responsibilities- may use a project Responsibilities Assignment Matrix (template to be provided)
- Identify interworking group dependencies; integrate other Bridges subgroup members into working groups as appropriate
- Seek feedback from appropriate stakeholders across phases of development (with support from the Project Manager as necessary)
- Receive deliverable approval (as determined per each phase's quality criteria)
- Develop communication plan for final product in collaboration with the Project Manager, Sponsor and additional Bridges stakeholders, as necessary
Roles and Responsibilities:

**Faculty Lead**
The Faculty Lead will be responsible for the following:

- Develop charge letters for working group team leads
- Work collaboratively with the Project Manager and team leads to establish deliverable tasks and activities
- Submit biweekly (or as otherwise discussed) status reports (template provided) to Project Manager to share project status including accomplishments, next steps, and outstanding issues
- Schedule and lead meetings (as frequently as necessary) with team leads to ensure ongoing project progress and request status updates to inform overall working group biweekly project updates
- Work collaboratively with the Project Manager and Team Lead to establish deliverable tasks and activities and utilize project management software to organize and update activities
- Disseminate monthly Bridges Project Management Update to the members of the supporting working groups to highlight ongoing work and progress across the Bridges project.
- Serve as approver for all work or completion of activities leading up to final deliverable completion
- Escalate any disagreements or issues for higher level consultation to the Project Manager in timely manner
- Represent the working group in broader cross-Bridges stakeholder meetings as appropriate
- Plan and implement communications strategy to engage stakeholders and publicize the work of the project in collaboration with the Project Sponsor and Project Manager

**Workgroup Team Lead**
Working group team leads will be asked to serve in this role for a defined and limited time. More specifically, they will:

- Communicate with the Faculty Lead on a weekly basis to share project accomplishments, next steps, and outstanding issues.
- Work collaboratively with the Project Manager, Faculty Lead, and Team Members to plan activities, resources, responsibility charts, and deadlines.
- Lead working group meetings with team members and/or stakeholders, as needed.
- Bring conflicts or problems to the Faculty Lead and project manager, as needed.
- Work with the Faculty Lead to communications strategy to engage external stakeholders and publicize the work of the project in collaboration with the Project Sponsor and Project Manager.

**Workgroup Team Member**
Working group team members will be responsible for the following:

- Collaborate with team members to complete the assigned activities
- Participate in meetings with Team Lead, as needed
• Bring conflicts or problems to the Team Lead, as needed

**Team Stakeholder**
Team stakeholders will contribute in the following ways, as necessary:
• Offer input and feedback to team members regarding overall deliverable
• Bring conflicts or problems to the Team Lead, as needed

**Staff Lead:**
The staff lead role will vary depending on the working group needs. In general, senior staff members are participatory members of working groups and may provide some administrative support as agreed to by the staff member, Faculty Lead and staff member’s supervisor. Each Faculty Lead will discuss the needs for staff support with the Project Manager leading up to the kickoff meeting.

**Resources:**
The Office of Medical Education will be able to provide some limited resources to support complex project activities, for example, support for stakeholder and outreach events. Please contact the Bridges Project Manager at Bridges@ucsf.edu to discuss the group's specific needs.