

## ReStage 4. Coach for performance change

*Goal: for the resident to identify areas for change and develop an achievable learning change plan.*

### Stage 4 Phrases and Strategies

Before developing a **learning change plan**, resident needs to understand and accept the content of the assessment.

Consider coaching to

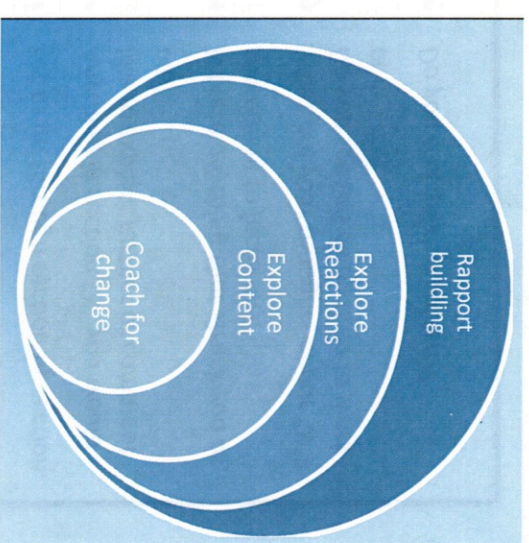
- Guide the development of goals and activities to achieve them
- Support self-directed learning
- Ensure a concrete plan is developed

Phrases to use:

- *What do you see as 1-2 priorities for improvement?*
- *What would you like to achieve on your next rotation?*
- *What 1-2 things would you target for immediate action?*
- *What would be your goal for this?*
- *What actions will you have to take?*
- *Who/what might help you?*
- *What might get in the way?*
- *What is your timeline?*
- *Do you think you can achieve it?*
- *How will you know you have been successful?*

### Learning Change Plan

1. Describe specific, observable changes you intend to make from this feedback session. What is your goal for each?
2. What will you do?
3. When will you begin?
4. When do you think you will see results?
5. Identify the resources you will use? Who will you help you? What resources will you need? What learning will you need?
6. What might get in the way of making the changes?
7. How will you overcome that?
8. How will you know when you have achieved your goal?



## Evidence-Informed Facilitated Feedback

Resident Version: June, 2017

Citation for this work: Sargeant J, Lockyer J, Mann K, Holmboe E, Silver I, Armson H, et al *Facilitated reflective performance feedback: Developing an evidence and theory-based model*, Academic Medicine 2015;90(12): 1698-706.

Funding:  
NBME Stemmler Foundation 2014-16



## Stage 1. Build rapport and relationship

*Goal: to engage the resident, build relationship, and build mutual respect and trust.*

- Explain that purpose is to provide:
  - Information about how they are doing;
  - A chance to describe their training and experiences;
  - Determine the data that can present opportunities for improvement.
- Outline the agenda to:
  - Review performance data and gaps;
  - Discuss their reactions to the data, and what it means to them;
  - Develop an action plan from the data.

### Stage 1 Phrases and Strategies

- *How has this rotation gone for you? What did you enjoy? What challenged you? How do you think you are doing?*
  - *Tell me about your assessment and feedback experiences to date. What has been helpful? Or, if this is one of a series of meetings. The last time we met, you were going to do [xxx], how did that work?*
  - *What do you want to get out of the feedback session?*
- Confirm what you are hearing; show respect; build trust; validate.*
- Relationship building is central and needs attention throughout the session.**

## Stage 2. Explore reactions to and perceptions of the data/report

*Goal: for the resident to feel understood and that their perspectives are heard and respected.*

### Stage 2 Phrases and Strategies

- *What were your initial reactions? Anything particularly striking?*
- *Did anything in the report surprise you? Tell me more about that...*
- *How do these data compare with how you think you were doing? Any surprises?*
- *Based on your reactions, is there a particular part of the report that you would like to focus on?*

Negative reactions/surprises tend to be more frequent when, there are:

- Lack of concrete examples in data
  - Data showing one is not doing as well as one thought
  - Subjective data that is not supported by objective data
- Be prepared for expression of negative reactions in these cases. Phrases to validate negative reactions:
- *It is difficult to hear feedback that disconfirms how we see ourselves.*
  - *We are all trying to do our best and it is tough to hear when we are not hitting the mark.*
  - *We are going to work together.*

## Stage 3. Explore resident understanding of the content of the data/report

*Goal: for resident to be clear about what the assessment data mean and the opportunities suggested for improvement.*

### Stage 3 Phrases and Strategies

Ask general questions initially, but be systematic as the session goes on, particularly ensuring that you cover areas you have noticed that might impact on patient safety or need immediate attention for achievement of milestones and Entrustable Professional Activities (EPA's).

- *Were there things in the data that did not make sense to you?*
- *Is there anything that is not clear?*
- *Let us go through section by section.*
- *Anything in section "X" you would like to explore further or comment on?*
- *Is there anything that struck you as something to focus on?*
- *What are your thoughts about "X"? Do you see this as an area to work on?*
- *Do you recognize a pattern?*