

Stage 1. Build relationship

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

Explain the purpose of the report and the review, i.e., to share information about how they are doing; for them to describe their training and experiences; determine data identifying opportunities for improvement.

Outline the agenda: to review performance data and gaps; discuss their reactions to the data and what it means to them, and co-develop an action plan from the data.

Phrases and Strategies:

How has the 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?

If this is one of a series of meetings, The last time we met, you were going to do [X], how did that work?

What do you want to get out of the feedback session?

Confirm what you are hearing; empathize; show respect; build trust validate.

Relationship-building is central and needs attention throughout the discussion.

Stage 2. Explore reactions and perceptions about the data/report

Goal: To ensure the resident feels understood and that their views are heard and respected.

Phrases and strategies:

What were your initial reactions? Was anything particularly striking?

Were there surprises? Tell me more about that...

How do these data compare with how you thought 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 frequently elicited by:

- Lack of concrete examples in the report
- Data showing that one is not doing as well as one thought
- Subjective data not supported by objective data

Be prepared for negative reactions in these cases. Support expression of negative reactions using general facilitative approaches and explore reasons for these reactions.

It is difficult to hear feedback that disconfirms how we see ourselves.

We are all trying to do your best and it is tough to hear when we are not hitting the mark.

We are going to work together.

Stage 3: Confirm content

Goal: To ensure the resident is clear about what the assessment data mean and the opportunities suggested for improvement.

Phrases and strategies:

Ask general questions initially, but be systematic as the session goes on, **to ensure that items that might impact patient safety or are priorities for achievement are covered.**

Were there things in the data that didn't make sense to you?

Is there anything you are not clear about?

Let's go through the report section by section

Is there anything in section [X] that you'd like to explore further or comment on?

Anything that causes you to think of how this might impact on patient safety or team work?

Anything that struck you as something to focus on?

Do you recognize a pattern?

When I reviewed the report, I noticed [X], what are your thoughts about that?

Stage 4: Coach for performance change and co-create an action plan

Goal: To ensure the resident identifies areas for change and co-develops an achievable action plan.

Before developing a learning change plan (see next panel), resident needs to understand and accept the content of the assessment.

Coaching guides the development of specific goals and activities to achieve them, supports self-directed learning, and ensures the action plan is co-developed.

Phrases and strategies:

What do you see as the priorities for improvement?

What would you like to achieve on your next rotation (4 month block)?

What 2-3 things will you target for immediate action?

What will your goals be?

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?

Action Plan

Describe specific, observable change/s you intend to make. For each:

What will you do?

When will you begin?

When do you think you will see results?

What resources will you need? Who can help you? What learning will you need?

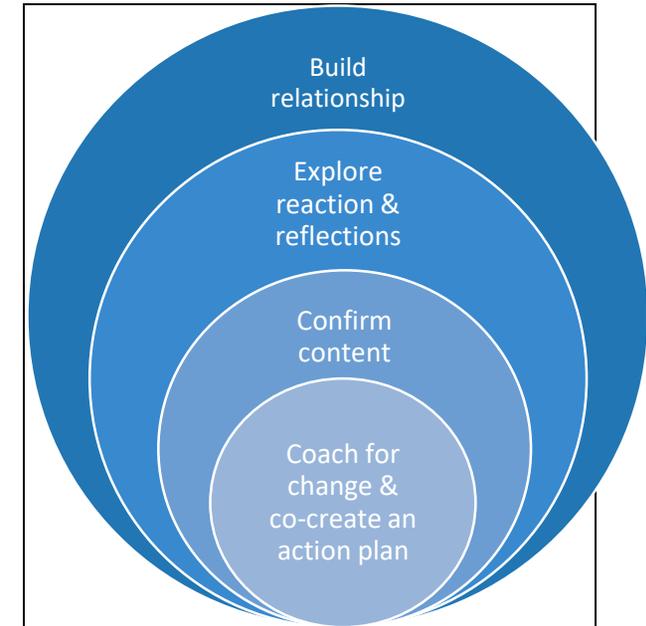
What might get in the way of making the changes?

How will you overcome that?

How will you know you have achieved your goal?

You Tube Videos:

- Video 1 uses competency based language:
https://youtu.be/_cSDQYjUEok
- Video 2 uses generic language:
<https://youtu.be/-ljhCWYujks>



R2C2

Evidence-Informed Facilitated Feedback and Coaching Resident Formal Version

Adapted from: Sargeant et al., Academic Medicine, 2015, 2018; Armson et al., Medical Education, 2019.

To be used during progress meetings and other formal review sessions. Further information about the R2C2 model, copies of this tri-fold and learning change plan forms may be found at <https://medicine.dal.ca/departments/core-units/cpd/faculty-development/R2C2.html>