

## Stage 1. Build relationship

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

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.

Introduce yourself and describe your practice.

### Phrases and Strategies:

*Tell me about your experience in completing the assessment and preparing for this meeting?*

*I'd like to hear about your practice (setting, patients, challenges, things you enjoy, things that make your practice unique).*

*Would you like to hear more about the assessment process?*

*What struck you about the report?*

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 reflections on the data/report

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

### Phrases and strategies:

*What were your initial reactions? Were there areas that particularly struck you?*

*Did anything in the report surprise you? 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

Subjective data (e.g., multisource feedback vs. audit and feedback data)

Comparative data, when scores are lower than those of others

Data identify areas where one is not doing as well as they thought.

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

## Stage 3: Confirm content

**Goal: To ensure the physician is clear about what the data mean for their practice and the opportunities they suggest for change.**

### Phrases and strategies:

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

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

*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?*

*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 data?*

Knowledge of the specialty and areas where opportunities frequently arise for improvement can be helpful.

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

**Goal: To ensure the physician understands, reflects upon and assimilates the content of the report in order to develop an achievable action plan.**

### Phrases and strategies:

The physician needs to understand, reflect upon and assimilate the content of the report before being able to plan for change.

Consider coaching as the skill of co-creating a specific action plan.

*And in the next 3 and 6 months – what would you like to see changed?*

*What action steps might you take to reach these goals?*

*What is your timeline?*

*What resources do you need?*

*What will help you succeed?*

*What might get in the way?*

*What are your strategies to overcome barriers?*

*How will you measure success and know you have been successful?*

## Action Plan

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

What is your goal?

What specific actions do you need to take?

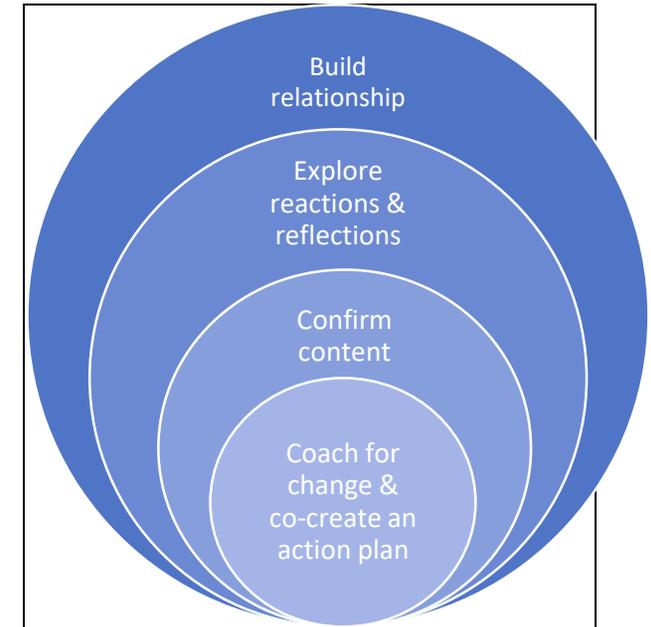
When will you begin? When do you think you will see results?

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



**R2C2**

## Evidence-Informed Facilitated Feedback and Coaching Physicians In Practice Version

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

To be used in discussions with practicing physicians about their performance data. 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>