



GRAND ROUNDS

Tuesdays, 8:00-9:00am
via Zoom



Tuesday, February 22, 2022

8:00 - 9:00

Title: "Assessment and Feedback in a Competency Based Era: Exploring theory, evidence and its application"

Presenter: Dr. Jocelyn Lockyer, Professor Emerita, Department of Community Health Sciences, Cumming School of Medicine, University of Calgary
Education Rounds

Objectives:

- Describe the key expectations of working in a Competency Based Era.
- Describe the science behind EPA and R2C2 development.
- Determine ways you might make your assessment and feedback strategies more effective and efficient.

**Complete attendance and evaluation online at:
<http://surveys.novascotia.ca/DoMGrandRounds>**

Grand Rounds are a self-approved group learning activity (Section 1) as defined by the Maintenance of Certification Program of the Royal College of Physicians and Surgeons of Canada



Background

R2C2 In the moment” builds on the R2C2 model to facilitate the discussions that occur following a clinical experience, procedural observation, or challenging case. The goal is for preceptor and learner to share perspectives on the experience, collaboratively identify areas for improvement and co-create an action plan. While contexts vary, the following are tips for each phase:

1. Build relationship. For longitudinal relationships, this phase may require a brief check-in about the day’s purpose or continuation of previous discussions. For first time interactions, time will be needed at the beginning to create a safe and comfortable relationship for sharing feedback and coaching.

2. Explore reactions and reflections. This diagnostic stage requires an iterative discussion to ensure learner and preceptor hear and understand each other.

3. Confirm content. In this stage, learner and preceptor consolidate content through developing a shared understanding of the experience and sets up the focus for coaching.

4. Coach for change and co-create action plan. This stage specifically identifies the goals for learning and change and co-creates a feasible plan for achieving one goal.

The panels provide suggestions for phrases and strategies. R2C2 provides a framework for discussion. Use discretion to select the most appropriate phrases.

Stage 1. Build relationship

Goal: To engage the learner and build mutual respect and trust.

The context will vary from continuing previous discussions based on longitudinal experiences between learner and preceptor to one-time interactions in which there may be minimal or no follow-up. This phase sets up future discussions.

Phrases and strategies:

First meeting: *This is the first time we’ve worked together. To help learners progress efficiently, I like to observe one thing learners are doing and have a feedback and coaching discussion about the experience. How does that sound and what would be useful to you?*

For following up with continuing learners: *During our last discussion, you identified that you would be working on [X]. How has that been going for you?*

For both a first meeting and a continuing learner: *How has this rotation/clinic been for you? What do you enjoy? What challenges you?*

What do you want to achieve today? What skills are you working on? What can I observe?

Confirm what you are hearing, show respect, build trust, validate.

Relationship building is central. It may have been established previously (if longitudinal experience) but must be maintained throughout the session.

Stage 2. Explore reactions and reflections

Goal: To foster learner self-reflection, address emotions and begin to develop shared understanding of the experience.

Phrases and strategies:

Gain learner perspective: *How was that experience for you? What went well? Were there challenges for you? Did anything surprise you?*

Provide preceptor perspective: *When I watched you, I observed [X]. I wondered what made you decide to do that? I’m curious, when you decided to do [Y], what was your intent? I thought you did [X] well, but you seemed frustrated by [Y]. Is that accurate?*

Enable learner to reflect upon and react to preceptor’s comments: *What are you thinking about hearing my observations?*

Preceptor may provide additional information as needed to move towards a shared understanding.

When there are gaps in performance: *I don’t think that went as smoothly as we might have hoped. What things do you wish you might done differently? I know it is difficult to hear that, I know you were trying to do your best. How could we have supported you better? Do you have any other ideas?*

Enable learner to provide additional information about their perspective, intentions, behaviors and feelings.

Stage 3: Confirm content

Goal: To enable learner and preceptor to reach shared understanding about content and consensus on one priority.

This is a consolidation stage for reaching agreement on the focus for coaching and co-creating an action plan.

Phrases and strategies:

Is there anything we discussed that isn't clear?

Do you agree with what I have said?

That is how I saw it as well.

Would you like to add anything at this point?

For learner who is uncertain: *What are your thoughts about [X]? Do you see this as an area you might work on?*

Now that we have talked about [X], what is your goal?

To summarize, I hear you say that you want to work on [X], is that correct?

Ensure there is a clear understanding of the areas to be pursued before moving to coaching.

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

Goal: To ensure learner and preceptor agree on learning goals and create an achievable action plan.

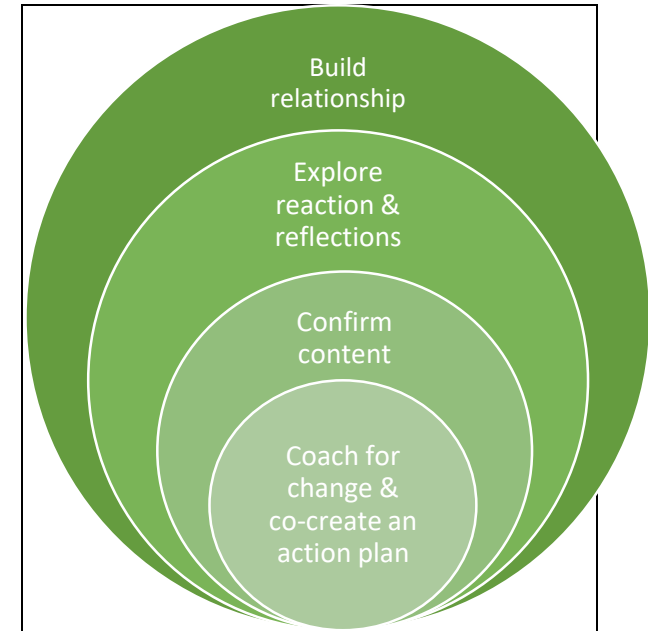
Phrases and strategies:

Set a goal: *Now that we have established some directions for learning, what specific goal requires the most attention right now? What one goal would you like to focus on at this time? If you could do one thing differently next time, what would it be?*

For learner who is having difficulty coming up with an area of focus: *It seems you may be unsure about what you want to work on; can I suggest that you work on [X]. Will that work for you?*

Establish plan: *How will you achieve this goal? What might get in your way? What resources will you need? Who will help you with this? Who are you working with next? Might they help you? When will you begin to implement this plan?*

Determine follow-up plan: *Let's talk about how you will follow-up. Who will you follow-up with? What will this require? What is your timeline? How long might it take for you and others to see results? How will you know when you have achieved your goal?*



R2C2

Evidence-Informed Facilitated Feedback and Coaching “In-the-Moment” Version

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

To be used for feedback discussions following a brief clinical experience; e.g. following an observation, at end of a clinical day. 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>