AUPN Neurology Clerkship and Program Directors Workshop 2014

Back to Basics: Evaluation and Feedback

Sunday, April 27, 2014 ~ 6:30-8:30 am
Philadelphia Marriott Downtown
1201 Market Street
Philadelphia, PA 19107
Meeting Room: 405

Course Directors:
James M. Stankiewicz MD, Harvard Medical School
Jeffrey C. McClean MD, San Antonio Military Medical Center

Course Description:
Both the novice educator and the seasoned veteran of many years can benefit from revisiting the way they evaluate trainees and provide feedback. It is only fair to our students that we evaluate as accurately as possible given high stakes residency or fellowship placement. It is also requisite that we give the best possible feedback to promote professional development. In this course two experts bring educators up-to-date on current understandings in evaluation and feedback. Educators will also learn from their colleagues about approaches that work. We intend to empower course attendees to do both evaluations and feedback better. Open to both clerkship and program directors.

Agenda

6:30-7:00 State of the Art Evaluation
Speaker: C. Jessica Dine, MD, University of Pennsylvania

7:00-7:20 Small Group Case Exploration
Facilitator: James M. Stankiewicz, MD, Harvard Medical School
- Challenge 1: The “un-deserved” grade
- Challenge 2: Is it an Honors or a High Pass?

7:20-7:50 State of the Art Feedback
Speaker: Judy A. Shea, PhD, University of Pennsylvania

7:50-8:10 Feedback on Feedback: Dual Practice Session
Speaker: James M. Stankiewicz, MD, Harvard Medical School

8:10-8:30 Small Group Case Exploration
Facilitator: Jeffrey C. McClean, MD, San Antonio Military Medical Center
- Challenge 3: Is it the same student? Discrepancies in evaluation
- Challenge 4: How to motivate unmotivated faculty
Faculty Biographies

Dr. James M. Stankiewicz
Harvard Medical School

Dr. Stankiewicz is an Assistant Professor of Neurology at Harvard Medical School. He is Neurology Clerkship Director at Brigham and Women’s Hospital. He also co-directs the multiple sclerosis fellowship program at the Partners MS center.

Dr. Stankiewicz received his AB from the University of Chicago in 1993 in the Biological Sciences with a specialization in Neurosciences, graduating Phi Beta Kappa. He earned his MD at Loyola University Medical School. He completed medical internship at Mt. Auburn hospital and neurology residency at Tufts. He was a post-doctoral research fellow in the neuroimaging of multiple sclerosis under the guidance of Rohit Bakshi, MD.

Dr. Stankiewicz has authored or co-authored over twenty scholarly works. He co-edits Multiple Sclerosis: Principles of Diagnosis and Treatment, currently the best selling textbook in the field.

Dr. Jeffrey C. McClean
San Antonio Military Medical Center

Dr. C. Jessica Dine
University of Pennsylvania

Dr. Dine is an Assistant Professor in the Division of Pulmonary, Allergy and Critical Care at the Perelman School of Medicine at the University of Pennsylvania. She is also an Associate Program Director for the Internal Medicine Residency Program. Dr. Dine’s clinical focus is on consultative pulmonary medicine. Her research interests include understanding and measuring the formation of practice patterns and creating measures of supervision, influence and training in medical education.

Judy A. Shea, Ph.D.
University of Pennsylvania

Judy A. Shea, Ph.D. is Professor in the Division of General Internal Medicine, Department of Medicine, University of Pennsylvania. She is Interim Chief, General Internal Medicine, Associate Dean of Medical Education Research and Director of the Office of Evaluation and Assessment in the Academic Programs Office, School of Medicine. She serves duals roles, working with faculty and fellows to design and evaluate research projects, and directing the evaluation of the medical school curriculum and faculty. Much of her work focuses on evaluating the psychometric properties of curriculum evaluation tools and developing measures to assess components of health such
Objectives:

1. Define milestones and Entrustable Professional Activities (EPA)
2. Detail a practical example of how to develop a Next Accreditation System (NAS)-ready evaluation system
3. Evaluate potential barriers to implementation
Learning objectives

Small Group Case Exploration
1. Develop a consistent approach to challenging evaluation situations
2. Learn strategies to make difficult grading situations less stressful
3. Gain exposure to how others think about grading

Small Group Case Exploration
Challenge 1: The “un-deserved” grade

Your clerkship coordinator sends you the grades for last month’s students. You scan the spreadsheet and see that Joe Smith has performed poorly, below the cut-off for passing. Floor evaluation scores are low but written comments collected on the evaluations do not converge on specific behaviors that were concerning. There are a few comments about how Joe’s presentations were lackluster but improving. His shelf score is in the lowest 5\textsuperscript{th} percentile nationally.

1. How would you approach this situation? What are the issues here?

2. Is there any more information you would collect? Would you fail the student or take a different approach?

You tell Joe about his substandard performance and your decision about his grade. He tells you that he is surprised to hear this and very upset. He wishes to meet with you to review his performance.

3. Would you prepare for this meeting? If so, how?

Challenge 2: Is it an Honors or a High Pass?

That same month you see on the spreadsheet that Sara Jones is on the borderline between high honors and honors. Your cutoff is 85\textsuperscript{th} percentile for high honors, Sara’s overall grade (shelf and evals) falls in the 82\textsuperscript{nd} percentile. Her shelf was in the 90\textsuperscript{th} percentile. You had Sara on service with you, very much liked her, and personally felt like she probably was in the low high honors range. She has told you that she would like to pursue neurology as a career.

1. How would you approach this situation? What are the issues here?

2. Is there any more information you would collect? Would you keep her grade a high pass or give her the honors?
State of the Art Feedback

Judy A. Shea, Ph.D.
University of Pennsylvania

Objectives:

1. Define feedback and its importance
2. Recognize barriers to providing feedback
3. Identify effective characteristics of feedback
Providing Effective Feedback

Judy A. Shea, PhD
Professor of Medicine – Perelman School of Medicine

With attribution to
Jennifer Kogan, M.D.
Objectives

- Define feedback and its importance
- Recognize barriers to providing feedback
- Identify effective characteristics of feedback
What is feedback?
“Specific information about the comparison between a trainee’s observed performance and a standard, given with the intent to improve the trainee’s performance.”

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“Feedback is an assessment for learning rather than an assessment of learning.”

Feedback vs. Evaluation

Feedback
- Conveys information
- Formative
- Current performance
- Foster learning

Evaluation
- Conveys judgment
- Summative
- Past performance
- Certification/grades
Micro vs. Macro Feedback

**Micro**
- In the moment
- Daily
- Brief (1-3 minutes)
- “Feedback nugget”

**Macro**
- Mid-rotation
- Less frequent
- More detailed (5-20 minutes)
- More formal/structured
How Do People Become Experts?

- Deliberate practice
  - Working on well defined tasks
  - Informative feedback
  - Repetition
  - Self-reflection (but self assessment is inaccurate)
  - Motivation
  - Endurance


- Coaching
The Role of the Coach

- “They observe, they judge, and they guide”

- “That one twenty-minute discussion gave me more to consider and work on than I’d had in the past five years”

Atul Gawande, New Yorker 10/3/2011
Implications of Education without Feedback

- Missed learning opportunities
- Performance plateau
- Learner insecurity
- Inaccurate perception of performance
  - Disappointment and surprise with final evaluations
Objectives

- Define feedback and its importance
- Recognize barriers to providing feedback
- Identify effective characteristics
What Are The Barriers To Feedback?
Barriers

- Time constraints
- Limited information about performance
- Unclear standards of competence
- Giving negative feedback
  - Undesirable consequences for learner
  - Undesirable consequences for teacher
Barriers

• Receiver Characteristics
  – Superior
  – Peers
  – Friend/someone you like
  – Someone who is trying
  – Defensive
  – Lack of insight
  – Lack of will

• Repercussions on evaluations
Barriers

• Contextual factors
  – Finding time (post call, end of service)
  – Short time working together
  – Unaware of external circumstances
  – Early year- lack comparisons

• Type of feedback
  – Constructive
  – Not being overly discouraging
  – Making sure taken as useful
Opposing View Points

**Faculty**

“*We give a lot of feedback all of the time.*”

**Learners**

“*We never get any feedback*”
Explaining the Disconnect

- Learners’ self assessment skills may be poor
- Overpowering influence of emotion
- Difficulty recognizing feedback
- Relationships
  - Credibility
  - Trust

Bing-You RG. JAMA 2009; 302(12):1330-1
Objectives

- Define feedback and its importance
- Recognize barriers to providing feedback
- Identify effective characteristics
Principles of Effective Feedback

Think of an example when feedback went well. . .

Why did it go well?
Approach

➢ Set the stage
➢ Ask
➢ Tell
➢ Ask
Approach

- Set the stage
- Ask
- Tell
- Ask
Set the Stage

- Establish goals upfront: yours & the learner
- Establish expectation of feedback
- Create the right environment
- Signpost
Creating Right Environment

- Place
  - Private, quiet
- Timing
  - Timely vs. Delayed
- Check your intentions
Signpost

- Establish expectation for feedback day 1
- Use the “F word”
- “I want to give you some feedback”
Approach

- Set the stage
- Ask
- Tell
- Ask
Ask

- Learner to assess own performance
  - Begins a conversation
  - Assesses learner’s insight
  - Promotes reflective practice
Examples

- “How do you think that went?”
- “How do you think things are going?”
- “What is going/went well?”
- “What are you trying to work on?”
- “What didn’t go as well as you hoped?”
- “What would you do different the next time?”
- “What do you want feedback about?”
Rationale

- Makes feedback interactive conversation
- Assesses learner’s level of insight
- Promotes reflective practice

- Be an active listener
- Ask questions
- Reflect back
Approach

- Set the stage
- Ask
- Tell
- Ask
Tell

- What you think of their self-assessment
- What you observed
  - Positive and corrective
- Action plan

** Remember: No more than 2-3 constructive elements
Specific, Positive, Negative

- Be specific
- Reinforce positives and address areas requiring improvement
  - Use “and” instead of “but”
- Limit quantity
Tone and Content

- Be descriptive not evaluative
  - NOT: “Your history taking was totally inadequate”
  - RATHER: “You omitted a key part of the history”

- Keep it about the performance not the person

- Use “I” instead of “You”
Ask (again)

- Receiver what they understand to be areas needing work
  - What do you need to do differently?
- How they are going to work on it
  - Include an action plan
## Successful Feedback

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<th>“Feed-up”</th>
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<td>“Where to next?”</td>
<td>“Feed-forward”</td>
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*Hattie and Timperley. Review of Educational Research. 2007;77:81-112*
Take Home Messages

- Give micro and macro feedback
- Think of yourself as a coach
- Signpost your feedback
- Ask-Tell-Ask
- It’s more about feed-forward than feedback
Recommended Reading

AUPN Neurology Clerkship and Program Directors Workshop 2014
Back to Basics: Evaluation and Feedback

Learning objectives

Feedback on Feedback: Dual Practice Session
1. Gain experience in delivering feedback effectively
2. Appreciate areas for growth in giving feedback
3. Sharpen strengths in feedback delivery

Feedback on Feedback: Dual Practice Session

Exercise: You will pair with another course participant. One of you will be John, the person receiving feedback, and the other will be the faculty member giving the feedback. Your feedback session should last 5-10 minutes. After the session is completed, “John” should let the faculty member know how the feedback session went from his perspective. “John” should then give feedback on how well the feedback was delivered using the principles of feedback given by Dr. Shea. Then the pair should switch roles and repeat.

The scenario:

You are working with a resident, John, on the floors and have a number of concerns. John has been taking the calls for the consult pager and is often times sharp with those asking for consults. His knowledge base, presentations, and clinical formulations are below what you would expect for his level of training though not markedly so. He seems disengaged from patients. On the other hand, he has kept the service well organized and has helped keep the consulting teams well informed.
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Back to Basics: Evaluation and Feedback

Learning objectives

Small Group Case Exploration
1. Develop a consistent approach to challenging evaluation situations
2. Learn strategies to make difficult grading situations less stressful
3. Gain exposure to how others think about grading
4. Discuss methods to encourage faculty to meaningfully participate in evaluation and feedback

Small Group Case Exploration

Challenge 3: Is it the same student?? Discrepancies in evaluation.

During the course of a four-week rotation, John Smith works primarily with two attendings and several housestaff. From one of the attendings and the housestaff, you receive glowing evaluations that speak of John’s dedication, professionalism, and oral presentations. However, the second attending notes that while John is very pleasant, he is consistently late, has frequent errors in his medical documentation, misses key findings on the neurological exam, and is unable to determine a reasonable localization for many patients.

1. How would you approach this situation? What are the issues here?

2. How do you take this divergent information and come up with a single grade? Do you need additional information?

Challenge 4: How to motivate unmotivated faculty

Dr. Thomas is a distinguished and senior member of your department. He is an excellent clinician and students consistently rate him very high in terms of his clinical and didactic teaching. However, he consistently fails to give students feedback or submit evaluations. When he does submit evaluations they are typically very generic without any specific or narrative information. You discuss these issues with him, but he feels he is “too busy with patients and teaching to waste time on more paperwork.”

1. How would you approach this situation? What are the issues here?

2. How do you encourage Dr. Thomas to invest time in the evaluation and feedback of students?
1 - State of the Art Evaluation  
*Speaker: C. Jessica Dine, MD, University of Pennsylvania*

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2 - Small Group Case Exploration  
*Facilitator: James M. Stankiewicz, MD, Harvard Medical School*

*Challenge 1: The “un-deserved” grade*

*Challenge 2: Is it an Honors or a High Pass?*

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3 - State of the Art Feedback  
*Speaker: Judy A. Shea, PhD, University of Pennsylvania*

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4- Feedback on Feedback: Dual Practice Session  
*Speaker: James M. Stankiewicz, MD, Harvard Medical School*

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5 - Small Group Case Exploration  
*Facilitator: Jeffrey C. McClean, MD, San Antonio Military Medical Center*

Challenge 3: Is it the same student? Discrepancies in evaluation  
Challenge 4: How to motivate unmotivated faculty  

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What portions of the workshop did you find most useful or least useful?
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