

Coaching to Advance Resident Engagement: Adult Learning and Advising Sessions

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Objectives

On completion of this session the participants will be able to...

1. Discriminate between the roles of advisor, coach, and mentor
2. Describe why the coaching model may increase resident engagement in professional development based on theories of self-directed learning
3. Utilize specific coaching techniques, practice setting and refining SMART goals, and troubleshoot common problems

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ACGME RC-FM

- V.A.2. Formative Evaluation
- V.A.2.b) The program must:
- V.A.2.b).(3) document progressive resident performance improvement appropriate to educational level; and, (Core)
- V.A.2.b).(4) provide each resident with documented semiannual evaluation of performance with feedback. (Core)

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RPS Criteria for Excellence 9th Ed

- “Engaged Faculty... The **advisor role of the faculty is essential** to monitoring the successful outcome of individual educational needs identified for specific residents... and ensure graduate’s success.”
- “Individualized Education Plan – **An IEP should be developed for residents** as they matriculate... Each resident must have a faculty advisor. Meetings with the advisor should occur at least every six months to review...”
- “In addition, **residents should set professional and personal learning goals** that can be achieved during residency, as well as goals to which they aspire after graduation. Aspirational goals should be encouraged, but need to be tempered by the reality of residency.”

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Advising Session Domains & Topics

- **Academic Requirements**
 - Numbers! – New Innovations Scorecard
 - Scholarly activity
 - Performance Improvement activity
 - Documentation timeliness
 - Duty Hours adherence
 - Supervision requirements
- **Career Development**
 - Fellowship planning
 - Post-residency plans
 - Elective choices
 - Self-designed rotations
 - CME plans
 - CV creation and job search
- **Educational Progress**
 - Field Notes
 - Attending-completed rotation evaluations
 - Resident-completed rotation evaluations
 - ISTE preparation & performance
 - Milestone advancement
 - Future: Upcoming rotations
- **Wellness**
 - Home-life stability
 - Sleep deprivation
 - Mood check
 - Exercise
 - Substance concerns
 - Vacation planning

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Advisor / Coach / Mentor



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Advisor/Coach/Mentor

- Advisor
 - Usually assigned to advisee
 - Rule enforcer / Information Provider
- Mentor
 - Chosen by the advisee, can have multiple
 - Takes advisee “under wing”
 - Similar career goals / passions
- Coach
 - See next slide

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Why Coaching?

- The process of helping people focus, discover, and/or clarify:
 - Where they are today
 - Where they want to go
 - How to get there
- Coaching is a present-and-future focused tool for expanding others' abilities
- Egan's skilled helper model



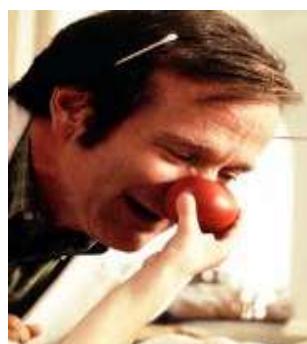
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How to Coach



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Intrinsic vs Extrinsic Motivation



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ACTIVITY TIME

Pair up with a partner

Think of an example of when you did something because of extrinsic motivation and another because of intrinsic motivation

Share these with a partner – discuss outcomes, if they led to change, how well it worked

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Egan's Skilled Helper Model

STAGE 1: Current Scenario

1a: The story (What's going on?)

1b: Blind spots (What's really going on?)

1c: Leveraging (Focusing & Prioritizing)



STAGE 2: Preferred Scenario

2a: Possibilities (Ideally, What do I want instead?)

2b: Change agenda (SMART goals)

2c: Commitment (Check goals are right)



STAGE 3: Action Strategies

3a: Possible actions (How many ways are there?)

3b: Best fit strategies (What will work for me?)

3c: Plan (What next & when?)

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Stage 1: Current Scenario

- Safe place for the learner to share their story in their way. Often as important for them to hear themselves as it is for coach to hear.
- 1A: Expansive – telling their story
 - Coach Skills: active listening, reflecting, paraphrasing, open ?s
- 1B: Challenging – encouraging clarity
 - Coach Skills: differing perspectives, patterns & connections, should / ought, blind spots, ownership
- 1C: Focusing & Ordering – determining what matters
 - Coach Skills: facilitating, prioritizing

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Stage 2: Preferred Scenario

- The most common pitfall is to skip this step. This changes perception of challenges to opportunities
- 2A: Creative – broadening horizons
 - Coach Skills: Probing, brainstorming, imagination, patience
- 2B: Reality Check – defining SMART goals
 - Coach Skills: Knowledge of landscape (internal & external)
- 2C: Moving Forward – testing realism
 - Coach Skills: Checking of commitment, knowledge of costs / benefits

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Stage 3: Action Strategies

- The “how” stage. Describes what specific steps could be undertaken to lead to success
- 3A: More creative – breaking out of old habits
 - Coach Skills: knowledge of successful strategies, brainstorming
- 3B: Focus on strategies – reality-checking plans
 - Coach Skills: understanding of relationships, broad-viewpoint
- 3C: Moving to action – step by step planning
 - Coach Skills: facilitating organization, letting go, confirming

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But that's a LOT of steps.

No one has time to be cognizant
of all that!

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C
A
R
E

Current state of affairs: What is going on now?

- Active listening: let resident set agenda
- (try not to direct or give advice yet)
- Identify any blind spots

Aspiration: What do I want?

- This is the turning point in the discussion
- Active listening: Open-ended questions, reflection & encouragement
- Help to refine & clarify
- Establish priorities (areas of strength or weakness?)
- Assess values and level of commitment

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R
E

Route: How do I get there?

- **SMART goal(s):** goals may be proximal or distant; concrete or abstract; approach or avoidance; performance or learning
- **Pitfalls:** - too specific - myopic or shortsighted (solution: help to keep the big picture in mind; context)
- Driven by only extrinsic factors (solution: continued reflection & contextualization to arrive at internal motivating factors)
- Formalize next steps; accountability

Evaluate: How am I doing?

- Assess progress on previous SMART goals (encouragement)
- Update and refine as necessary - importance of recognition of achievement and time for reflection on achievement
- New SMART goals: build on existing progress or use the accomplished goal as motivation for a new & more challenging goal

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SMART

GOALS



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Smart Goals / Outcomes

SMART OUTCOME	SIMPLE TERMS
Specific	Who
Measurable	Assessment - Bound
Achievable	Possible
Relevant / Research Based	What
Time – Constrained	When

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Live Coaching Sessions

- Think of a personal goal
- Develop a SMART Goal within the CARE Tool
- Share with partner
- Partner will probe / guidance using CARE Tool

- Once you've done this, switch!

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Feasibility and Scalability

- Tool simple to use and easily implemented
- Adaptable to individual programs, advising styles, meeting types, and residents
- Requires buy-in from faculty and residents
- Training of advisors & orientation of residents to tool

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Summary

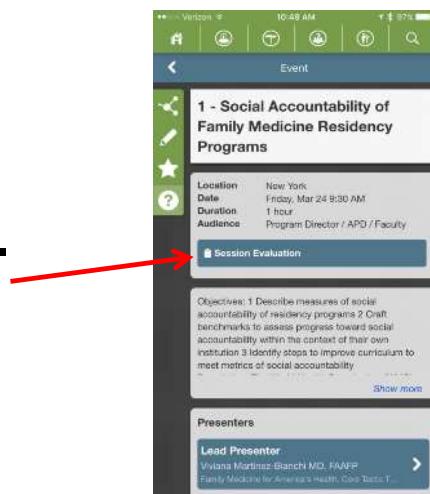
Difference between advisor, coach, and mentor

Coaching model and self-directed learning

Coaching techniques

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Please
complete the
session evaluation.



Thank you.

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