

Coaching to Advance Resident Engagement: Adult Learning and Advising Sessions

David Wyncott, MD
Associate Program Director
Saint Joseph Health System FMR
Mishawaka, Indiana

Molly Benedum, MD
Associate Program Director
Greenville Health System FMR
Greenville, South Carolina



AMERICAN ACADEMY OF
FAMILY PHYSICIANS

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

AMERICAN ACADEMY OF FAMILY PHYSICIANS

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)

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.”

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

Advisor / Coach / Mentor



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

AMERICAN ACADEMY OF FAMILY PHYSICIANS

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



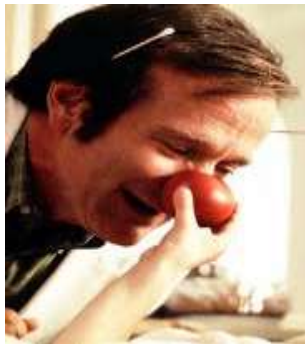
AMERICAN ACADEMY OF FAMILY PHYSICIANS

How to Coach



AMERICAN ACADEMY OF FAMILY PHYSICIANS

Intrinsic vs Extrinsic Motivation



AMERICAN ACADEMY OF FAMILY PHYSICIANS

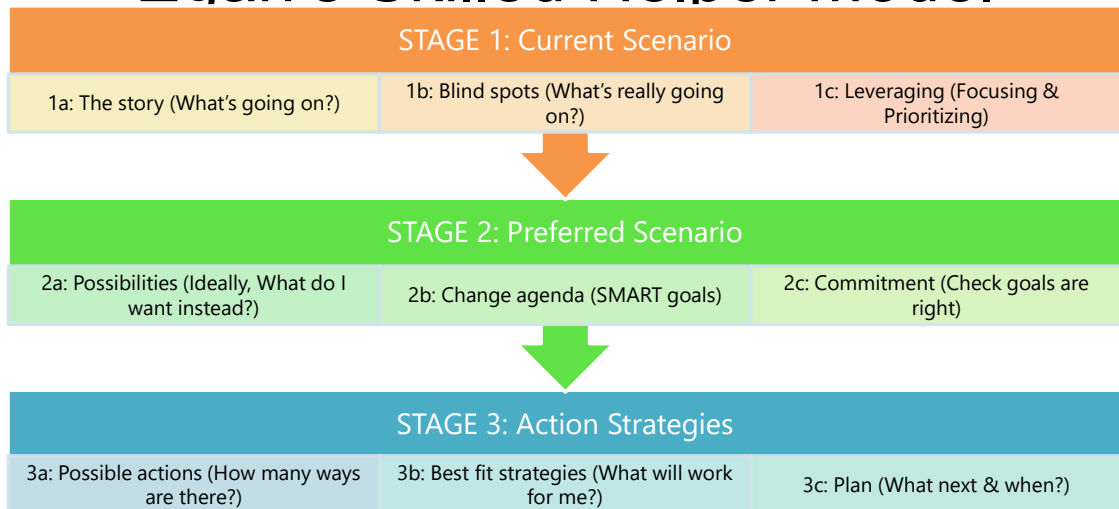
ACTIVITY TIME

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

Egan's Skilled Helper Model



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

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

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

But that’s a LOT of steps.

No one has time to be cognizant
of all that!



CARE | Coaching to Advance Resident Engagement

C 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

- ### A 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

AMERICAN ACADEMY OF FAMILY PHYSICIANS



CARE | Coaching to Advance Resident Engagement

R 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

- ### E 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 goal(s): build on existing progress or use the accomplished goal as motivation for a new & more challenging goal

AMERICAN ACADEMY OF FAMILY PHYSICIANS



SMART



GOALS



AMERICAN ACADEMY OF
FAMILY PHYSICIANS

Smart Goals / Outcomes

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

AMERICAN ACADEMY OF FAMILY PHYSICIANS

20

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!

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

Summary

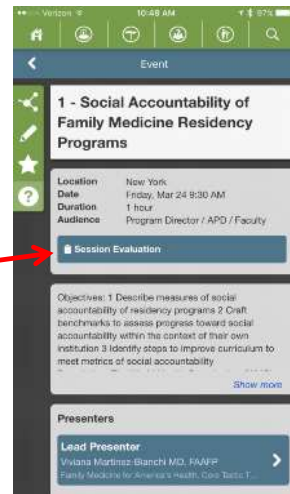
Difference between advisor, coach, and mentor

Coaching model and self-directed learning

Coaching techniques

Please
complete the
session evaluation.

Thank you.



References

- Vallerand RJ, Pelletier LG, Blais MR, et al: The Academic Motivation Scale: a measure of intrinsic, extrinsic, and amotivation in education. *Educ Psychol Meas* 1992; 52:1003–1017.
- Orsini, C., et al. (2015). "Psychometric Validation of the Academic Motivation Scale in a Dental Student Sample." *J Dent Educ* 79(8): 971-981.
- Nothnagle, M., Goldman, R., Quirk, M., Reis, S. Promoting Self-Directed Learning Skills in Residency: A Case Study in Program Development. *Acad Med*. 2010 Dec;85(12): 1874-9
- George, P., Reis, S., Dobson, M., Nothnagle, M. Using a Learning Coach to Develop FM Resident's Goal Setting and Reflection Skills. *J Grad Med Educ*. 2013 Jun; 5(2):289-93
- Murad, M., Coto-Yglesias, F., Varkey, P., Prokop, L., Murad, A. The effectiveness of self-directed learning in health professions education: a systematic review. *Med Educ*. 2010 Nov;44(11):1057-68.
- Kozakowski, Stanley M., Editor, *Residency Program Solutions Criteria for Excellence*, 9th Edition. AAFP. 2015.



AMERICAN ACADEMY OF
FAMILY PHYSICIANS

STRONG MEDICINE FOR AMERICA