

Checklist for Small Group Practice Session

Feedback Technique	Used Effectively?	
	Yes	No
Orientation and Climate (preparation before feedback given)		
Define goals of experience and discuss with learner		
Discuss with learner that feedback will be provided		
Select appropriate time and place for delivery of feedback		
Explain purpose of feedback (formative, not summative)		
Elicitation		
Use open-ended questions		
Ask the learner's assessment of the experience		
Ask what went well		
Ask learner what could be improved		
Feedback Delivery		
Provide a balance of reinforcing and constructive comments		
Descriptive, non-judgmental statements (use "I" statements)		
Give specific examples with first-hand data when possible		
Focus on the behavior, not the person		
Avoid vague terms such as good, excellent, "that was great"		
Improvement Plan		
Ask the learner for ideas regarding change		
Provide suggestions for improvement		
Together, articulate agreed upon goals		
Application		
Discuss how learner will implement strategies for change		
Talk through a possible future situation		
Review		
Check understanding of learner		
Review plan for making changes		
Specify time frame for reassessment		

Comments

Adapted from Ende, J. Feedback in clinical medical education. *JAMA*. 1983;250(6):777-781 and Katz, PO. Providing feedback. *Gastrointestinal Endoscopy Clinics of North America*. 1995;5(2):347-355.

OVERVIEW: A STEPWISE APPROACH TO PROVIDING FORMALIZED, INTERACTIVE FEEDBACK

PROMOTE STRUCTURE

1. Prepare Before Meeting
 - build relationship/rapport
 - establish agreed upon goals and objectives early
 - observe, collect relevant data
 - promote recipient's elicitation of feedback
 - prepare recipient early to expect feedback
 - set up conducive physical atmosphere and time for meeting
 - anticipate your learner
 - recognize your assumptions

2. Open Meeting Effectively
 - assess recipient readiness, promote rapport
 - establish purpose of meeting

3. Reiterate/Renegotiate/Establish Agreed Upon Performance Goals and Objectives

4. Elicit Recipient Self-Assessment

5. Explore Self-Assessment
 - provide Feedback Reinforcing Desirable Behaviors
 - challenge Undesirable Behaviors

6. Problem-Solve with Recipient

7. Generate Alternatives

8. Assess Recipient Understanding and Acceptance of Feedback

9. Close Meeting Effectively
 - summarize positives and areas/methods for future growth
 - formulate plan to assess progress

CREATE A SUPPORTIVE ENVIRONMENT

- Be specific
- Limit the amount
- Demonstrate interest and positive regard; build rapport
- Use descriptive, non-judgmental language
- Demonstrate openness and non-defensiveness yourself
- Involve the recipient in exploration, problem-solving and planning
- Assess recipient's understanding and acceptance of feedback
- Utilize skilled listening, inquiry and advocacy
- Check out assumptions
- Notice what is going well and help recipient do more of it

NOTE: Although feedback is often provided in a periodic, formal manner, it is important to provide well-timed, ongoing feedback as well.

Clinical: Outpatient Setting Attending-Student Scenario

Attending Role:

You are the attending in {insert your clinical practice setting} supervising a third year medical student during her basic clerkship rotation in your outpatient practice. This will likely be your only contact with this student during this rotation. You have asked the student to perform a complete history and physical on a patient. The student goes in and emerges half an hour later to deliver a complete history and physical. You are very impressed with her ability to organize the clinical information she has gathered into a logical and concise presentation. She describes the physical exam with each system as “normal” without any pertinent findings. She provides a clear assessment with an appropriate problem-based plan [the patient has a number of chronic conditions]. When you then go with her to examine the patient you notice that the ophthalmoscope is not working. You remember that she had reported the eye exam was within normal limits. She stated the patient’s pupils were equally round and reactive, and her “fundoscopic exam was without abnormalities.” **You have 10 minutes to provide feedback.**

Clinical: Outpatient Setting
Attending-Student Scenario

Student Role:

You are a third year medical student during a basic clerkship rotation in an outpatient practice. You are working with an attending who you haven't worked with before. You really want to do well in this rotation. Over the last week you feel you are improving with your H&Ps. You still sometimes forget to do all of the steps in the physical exam but you feel you're getting better with this. You just saw a patient for her annual visit and you precepted the patient with your attending.

Clinical: Outpatient Setting

Attending - Resident Scenario

Attending Role:

You are an attending seeing one of your patients in your outpatient practice. You review the clinic note from the previous visit and see that it is written by a second year resident whom you have been supervising intermittently through the year. The note has many problems. It is missing many important details including significant past medical history and the patient's current medications/dosages. In addition, his plan does not include his clinical reasoning (ie., why he chose to start an antibiotic for what sounded like a viral respiratory infection). This resident's documentation has been a problem all year and other attendings have also complained about his notes. Although his oral presentations are good and he seems very bright, his medical documentation is very poor. You've given him feedback earlier in the year when you noticed many of his notes were missing altogether. After your initial feedback, his documentation had seemed to improve but other attendings are still complaining. You see this note was co-signed by one of your colleagues. You are particularly concerned because he is being considered for a fellowship in your department. You've heard that he would like to stay at Hopkins but you are worried about his documentation. You've also noticed that he rarely attends conferences. He missed your lecture yesterday. You asked him to meet after clinic for feedback. **You have 10 minutes to provide feedback.**

Clinical: Outpatient Setting
Attending - Resident Scenario

Resident Role:

You are a second year resident at Hopkins. You're currently doing an outpatient elective. You feel the year has gone pretty well. One of the attendings has asked to meet with you after clinic. You met with this attending in the beginning of the year. He/she expressed concerns about your medical documentation. You were on a really busy service at the start of the year and accidentally forgot to dictate a few notes. You feel you're now up to speed and you never forget to dictate notes. You feel that efficiency in medical documentation is something you'd like to work on. You still have a hard time getting through all of sections in the H&P and you may forget some sections now and then. You are hoping to stay at Hopkins for a fellowship in {same field as the attending you're meeting with today}.

Clinical: Inpatient Setting Resident-Student Scenario

Senior Resident Role:

You are the senior resident on a busy inpatient team and you need to deliver midpoint feedback to a student (sub-intern) on your service. You have gotten to know this student well and you find him fairly easy to talk to. The student has been carrying 1-2 patients during his time with you and has not actively attempted to increase his census. At the start of the rotation you reviewed expectations for the sub-internship (i.e., should care for at least 3-4 patients, take ownership of patients, develop independent assessments/management plans). You have observed him do a solid job with his patients. He has conducted thorough histories and physicals (you observed two). During one history he seemed to jump around a bit, although admittedly, you rushed him as there were three other patients who need to be admitted. He gave a great presentation on {topic of your choice in your field} and in general he has been well-prepared. He cared for 3 patients with {common problem in your field} and he was able to accurately keep up with changes in his patients' status. Although the management for most of his patients has been straightforward and for the most part he has been up-to-date about their clinical status, he has not made any suggestions nor brought in any articles that might deepen the discussions around them. You understand that he is very interested in your field and that he very much wants to receive an Honors grade for the rotation. Your gut feeling is that he has not reached an Honors level performance. **You have 10 minutes to provide feedback.**

Clinical: Inpatient Setting
Resident-Student Scenario

Student Role:

You are a sub-intern on a busy inpatient service. Your senior resident has asked to meet with you for mid-point feedback. You feel you are doing well in the rotation. The patients you have been carrying are very complicated (medically and socially). You realize you're supposed to carry more patients but you're not sure how you'll be able to do this given the high complexity of the patients. You feel you are doing OK with coming up with your own management plans, but you know you can improve in this area. You really love your interactions with patients and you're working very well with the nursing staff and everyone on the team. You really want to do well in this rotation (you're considering this specialty for residency).

Non-Clinical: Small Group Teaching Setting

Small Group Instructor-Student Scenario

Instructor Role:

You are the small group leader for a {course of your choice} during the Year 1 Scientific Foundations of Medicine Course. You have 20 students in your small group and you're mid-way through the course. Over the last few weeks you've had a chance to observe the students working in teams during problem-solving exercises. You've noticed that early in the course one of the students seemed very excited about the class but recently she seems less engaged (i.e., unprepared for the sessions – very clear she hasn't been doing her independent reading). During the problem-solving exercises the other students in her group no longer ask her for her opinion. She seemed very excited about the clinical correlations exercises in the beginning of the course, but recently she has been very quiet in class. Interestingly, she has done well on some of the quizzes (far above the class mean). You ask to meet with the student to check in and provide some feedback. **You have 10 minutes to provide feedback.**

Non-Clinical: Small Group Teaching Setting

Small Group Instructor-Student Scenario

Student Role:

You are two months into your first year of medical school. You did very well in college and did not take any time between college and medical school. You majored in biochemistry and cell biology. You're not yet sure about your career path but you've recently spent some time shadowing a plastic surgeon at the hospital and you think this could be the path for you. When you started the year, you felt like you were far ahead of your classmates (many seemed to have majored in non-basic science). You were very excited to start the year, but over the last few weeks you feel the material is very repetitive. Your classmates seem to need more in-class time for discussion than you think is necessary. You understand you're supposed to work as a team but you're not seeing the connection between the coursework and what you're hoping to do in the future. Your small group instructor has asked to meet with you.

Non-Clinical: Research/Lab Setting

Faculty/Fellow – Student Scenario

Faculty/Fellow Role:

You have been working with a medical student who is during his Scholarly Concentration project in your lab for the past 6 weeks. You met with the student at the start of the summer to discuss the lab schedule, including lab meetings with the PI and conferences. When you reviewed his goals, he mentioned that he wants to learn as much as he can about {research in your field}. He is not in the MD/PhD program but he is very interested in having research be a central part of his future career. When you reviewed your expectations regarding the amount of time he should be in the lab, the student appeared to be on board. The student began the summer with a lot of enthusiasm. He made a few minor errors (e.g., didn't follow the protocol for some of the experiments) but he seemed to get back on track. Over the last few weeks you've noticed that the student seems less careful with experiments. He's arrived late to the lab and has missed a few important meetings. You ask him to meet to provide feedback. **You have 10 minutes to provide feedback.**

Non-Clinical: Research/Lab Setting
Faculty/Fellow – Student Scenario

Student Role:

You just finished your first year of medical school. You are doing your Scholarly Concentration project in a basic science lab. You had applied to the MD/PhD program but you were not accepted. You are still very interested in doing research as part of your career. You met with a few PIs and graduate students when you were looking for your SC project. You are happy with your lab position. You were very excited when you started in the lab, but after making a few mistakes you felt discouraged. You're questioning whether basic science research is the type of work you want to be doing. Your lab advisor has asked to meet with you.