How to Give Feedback Like a Rockstar

Heidi Combs MD, MS
Associate Professor, University of Washington,
Department of Psychiatry and Behavior Sciences

Jesse Markman MD, MBA
Assistant Professor, University of Washington,
Department of Psychiatry and Behavior Sciences
Objectives: At the end of this talk the participant will be able to:

- Describe the key components of teaching
- Apply key features of effective feedback to case practice
- Determine if a learner exhibits a problematic pattern of behavior that warrants remediation.
- Determine what domain deficit the learner is struggling with
- Use a framework for remediation to intervene in real-life cases
WHO ARE YOU &
WHY ARE YOU HERE?

by AiR

Start A QUEST to Discover Yourself
A quick survey

- Who has given feedback?
- Who found this difficult?
- Who has received feedback?
- Who has found it insufficient?
You are not alone

Trainees report they receive too little feedback

Faculty don’t feel they have skills or time to deliver feedback

Faculty and housestaff perceptions of feedback differ

Boehler et al. Med Educ 2006
AAMC Medical Student Questionnaire: https://www.aamc.org
Liberman et al. Med Teach 2005
A Quick Review: How To Teach
Key Steps to Teaching Effectively

- Follow-up
- Expectations
- Feedback
- Engagement
- Assessment
Expectations
Expectations

- Expectations are the basis of performance

- No one likes to not know what they should be doing

- Set expectations at the beginning of the rotation and refresh them often
  - If the expectations are not known by the learner, feedback will feel unsubstantiated
Expectations are the basis of performance

- High Expectations Beget High Performance
- Low Expectations Beget Low Performance
Engagement
Experience based learning gives the best retention

- Recall requires experience:

<table>
<thead>
<tr>
<th></th>
<th>Told</th>
<th>Told and Shown</th>
<th>Told, Shown, Experienced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recall (3 weeks)</td>
<td>70%</td>
<td>72%</td>
<td>85%</td>
</tr>
<tr>
<td>Recall (3 months)</td>
<td>10%</td>
<td>32%</td>
<td>65%</td>
</tr>
</tbody>
</table>

- And *Practice*

Create An Enabling Environment

- Learners Will Learn And Function Best When…
  - Learners have compelling direction
    - SET EXPECTATIONS
    - Give tasks and explain the context and reasoning behind the task – this will support autonomy in the future
  - Learners have an enabling structure
    - Allow autonomy and allow residents to know they have autonomy – this conveys trust
    - Allow ownership – ownership enables the hardest work
  - Learners have a supportive context
    - Be available and provide support – being present without being overbearing
    - Recognize and reinforce → everyone needs to succeed a little each day
  - Learners have expert coaching
    - We are the coaches

Matching learner states to teaching states for optimal engagement

<table>
<thead>
<tr>
<th>Learner states</th>
<th>Teacher states</th>
<th>Match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependent learner</td>
<td>Authoritative</td>
<td>Learner will get mired in the details</td>
</tr>
<tr>
<td></td>
<td>Motivator/facilitator</td>
<td>Learner will feel lost</td>
</tr>
<tr>
<td>Interested learner</td>
<td>Delegator</td>
<td></td>
</tr>
<tr>
<td>Self-directed learner</td>
<td>Learner feels</td>
<td>Learner will not benefit from the motivation of ownership of tasks</td>
</tr>
<tr>
<td></td>
<td>micromanaged</td>
<td></td>
</tr>
</tbody>
</table>

Grow. G. Teaching learners to be self directed. Adult Educ Q 1991;41:125-129
Assessment
Assessment

- Helps the teacher know where the learner is at and what the learner needs so teaching can be adjusted.
- Helps the teacher determine what sort of deficits are present so appropriate feedback can be given.
Assessments flow from expectations

- Set expectations at the beginning of the rotation and refresh them often
  - If the expectations are not known by the learner, the feedback based on the assessment will feel unsubstantiated

- Assess multiple events
  - Everyone has good and bad moments – recognize patterns
  - Write down notes of what you thought at the time
Challenges with assessments

- We tend not to distinguish between items - if a learner performs well in one area we tend to assess them well in other areas (halo effect).
- Personality traits (e.g. extroversion, introversion) may have a positive or negative impact on our assessment.

Be careful not to climb the ladder of inference
Feedback
Why do we struggle with feedback?
What Is Feedback?

- Feedback is the constructive and objective appraisal of performance given to improve skill
  - **Formative feedback:**
    - An appraisal of the skills demonstrated in the here and now
      - Purpose: Improving specific skills
      - Feedback should be specific, objective, and direct
  - **Summative feedback:**
    - A general appraisal of overarching skills and abilities
      - Purpose: Assessing competency, document achievement
      - Feedback is more general, but should have specific situations and occurrences that support both positive assessments and areas for suggested improvement

Feedback flows from assessment

Assessment is the opportunity to consider the stage and progress of the learner. It flows naturally once expectations are set.

Feedback is the opportunity to turn an assessment into a vehicle for growth for the learner.
Why Is Feedback Important?

- Feedback is essential to accurate self appraisal of skills and improvement on skills
  - Without feedback, alternative feedback is created by the learner and other assessments are overvalued
    - Memory is valued over clinical skill
  - Physicians significantly overvalue their current skill level and give poor self assessments

- Without feedback, no one gets any better

General principles regarding feedback

- Effective feedback is a function of:
  - Learners’ level of awareness of what is being reflected
  - The learner’s perception of the purpose of and the impartiality of observations
  - Rapport

- Couch the feedback in the learner’s perspective and expectations. If they feel you have their best interest in mind they can hear what you have to say

- Try to consider where the learner is coming from with regards to their performance

- Be aware of your cognitive or emotional biases
Giving feedback

- Be fair
- Be specific
- Be consistent
- Be constructive
- Be timely
- Be flexible
- Be open
- Be collaborative
- Do it in an appropriate setting
Remember…

- Assess multiple events
- Everyone has good and bad moments – recognize patterns
- Write down notes of what you thought at the time
Schedule feedback

- It will not happen if it is not prioritized!
- End of day?
- End of week?
- Middle of rotation?
- End of rotation?
- Work in to cases
  - Pre-procedure
  - Post-procedure
  - Debrief
Feedback tools

- Easy to remember tools to remind you to:
  - Encourage reflection by the learner
  - Describe the behavior or situation
  - Plan the changes that will be implemented
Ask Tell Ask

- **Ask for self assessment (ASK)**
  - Ask the learner what went well
  - Ask the learner what could be improved

- **Give your assessment- be specific (TELL)**
  - Describe what you noticed that went well
  - Describe things you think could be improved
    - Couch this in the experience of the learner to demonstrate the value to the learner
  - Make sure to allow the learner to comment on the feedback
    - If the learner does not own the feedback provided, they will not hear what you have said and are less likely to apply the information

- **Make an action plan (ASK)**
  - Plan, reflect, and analyze

ADAPT (Ask-Discuss-Ask-Plan Together)

Learner Initiates
- Reflect on learning goals.
- Communicate your goals
- Try to be natural.
- Reflect on the observation.
- Ask for feedback.
- Have a conversation about the observation.
- Ask for clarification.
- Plan next steps with your coach.

Coach Initiates
- Reflect on program & learner goals.
- Orient learner to expectations.
- Try to be neutral.
- Reflect on learner’s readiness.
- Ask for his/her thoughts about the observation.
- Coach observed, modifiable, specific behaviors related to the task(s).
- Ask learner to clarify points, as necessary.
- Plan next steps with your learner.

Developed at the University of Washington, UW Medicine, by Susan S. Johnston, EdD; Judith Pauwels, MD; Kristen Patton, MD; Tyra Fainstad, MD; Adelaide McClintock, MD.
One Minute Preceptor

- Get a commitment
- Probe for understanding
- Teach a general principle
- Give positive feedback
- Correct errors, suggest improvements
Better than nothing but....
10 minute break then breakout session
Your turn: Breakout Session 1
For our Zoomies

- You will be assigned and magically moved into breakout rooms
- Follow the directions for Breakout Session 1
- You will magically rejoin the large group in 20 minutes
Breakout Session 1 - Directions

- Cases with two parties, and an observer
  - One party is the learner with an ambiguous deficit
  - One is the preceptor who needs to make an assessment and then provide feedback
  - Third party observes and gives feedback on the process

- Take the following steps:
  - Step 1: Start your role-play, preceptor asks questions to develop an assessment
  - Step 2: Stop the case to share your assessment and see if it fits
  - Step 3: Restart your role-play and give feedback based on the assessment
Large Group Debrief

- What went well?
- What was challenging?
- What would you want someone else to take away from this exercise?
When to defer

- When strong emotions are involved
- When you are hearing about something secondhand and have not yet had an opportunity to investigate
Barriers to feedback?
Barriers to Feedback

- Lack of knowledge on what to give feedback about*
- Lack of training about how to give feedback*
- Lack of time
- Worry feedback will be misinterpreted
- Worry about the impact on your relationship with the learner

Fiona Lake  Teaching on the run tips: doctors as teachers. MJA 180:415-415 April 2004
No time?
Change your mindset about feedback

- Feedback often should take less than 5 minutes!!

- It is more valuable to give feedback snippets along the way!

- It is not helpful to hose them down at the end!
Worry the learner will misinterpret the feedback

- If you have set the stage using techniques reviewed the chance of misinterpretation is much less

- Direct feedback that is constructive is difficult BUT ESSENTIAL.

- We do not live in Lake Wobegon. The “West Coast Nice” doesn’t serve learners well.
Medical Student Mistreatment Study

- Completed qualitative analysis of a series of focus groups investigating “public humiliation” from the AAMC Graduation Questionnaire

- Participants defined “public humiliation” as negatively, purposefully induced embarrassment
  - One of the most significant risk factors for this perception is the perceived, negative intent of the teacher
  - Conversely, one of the most protective thing you can do with feedback is to ensure the learner understands your purpose and intent with the feedback

Final Words on Feedback

Create a culture of feedback

Be specific

Feedback takes time and energy

Respond and follow up
Final Words on Feedback

Giving feedback is one of the most helpful things you can do for learners.

Like everything else we do, we get better with practice so give it a go!
Break time: 10 minutes
When the going gets rough
“It’s not that you’re underperforming so much as you’re over-failing.”
Your remediation stories

- Good?
- Bad?
- Ugly?
Steps in Remediation

- Step 1: Determine if remediation is needed
- Step 2: Diagnose the deficit domain(s)
- Step 3: Jointly build a remediation plan
- Step 4: Set your plan for follow-up
Step 1: Determine if remediation is needed

- Describe the problem
- List specific examples
- Is this a pattern?
  - Yes or No
    - If no, will formative feedback suffice?
- Is this a stylistic difference rather than a true deficit?
  - Yes or No
    - If yes, is remediation really needed?
Figure 1: Determination if remediation is needed

1. Consider the frequency of the problem.
   - Is there a pattern of behavior or just a single event?
2. Gather information
   - If it is a single event, give specific feedback to the learner.
   - If there is a pattern, gather specific examples of the issue.
3. Discuss with the learner
   - Provide specific examples of area of concern
   - Elicit from learner their understanding of area of concern
4. Begin remediation process
   - Learner acknowledges need for improvement
Yes Houston, There is a problem: Now what?
Steps in Remediation

- Step 1: Determine if remediation is needed
- Step 2: Diagnose the deficit domain(s)
- Step 3: Jointly build a remediation plan
- Step 4: Set your plan for follow-up
Step 2: Identify the deficit(s)

Knowledge

Skills

Attitude
Knowledge

- If a learner doesn’t know what is going on or what he or she should be doing, it’s hard to get it right.

- You may find yourself surprised that a learner is unaware, but this may be reality.

- If these deficits are present, it may indicate a need to:
  - Assess your orientation practice and what is being retained.
  - Set more specific expectations and assess for understanding expectations.
Skills

- If a learner doesn’t know how to do what he or she should be doing, it’s hard to get it right
- Learner skill sets vary considerably
  - Rotations vary
  - The level of exposure at different sites varies
  - Learners vary in their ability to acquire new skills
- The presence of skill in one area does not necessarily translate to another area/skill/situation
Stages In Acquiring Skills

Awareness

Unconsciously Incompetent

Consciously Incompetent

Unconsciously Competent

Consciously Competent

Learning

Practice

Attitude

- The learner knows what to do and how to do it, but chooses not to
- Most difficult area for most people to address
- Assessment starts with understanding where your learner is coming from
Learner

- Do you remember what it was like to be a medical student… or resident?
- Where are they coming from?
Supplemental Assessment

- Sometimes the issue is actually more about our own interaction or experience of the learner than the learner
  - “it’s not you it’s me… no really...”

- Part of the assessment also needs to consider yourself with the learner
  - How is this making you feel?
  - What is bothering you about this?
  - What do you want or need?
Supplemental Assessment

- Sometimes learners are irritating or annoying
  - What is annoying you?
  - What is annoying about the thing that is annoying you?
  - Is this objectively irritating?

- It is entirely appropriate to conclude that the learner needs to annoy you less to be successful, but you want to be clear that this is part of the equation
Remediation Plan

- Step 1: Determine if remediation is needed
- Step 2: Identify the deficit(s) domain
- Step 3: Build a remediation plan
- Step 4: Set your plan for follow-up
Key Remediation Plan Features

- Dependent on deficit
- Created collaboratively with learner and supervisor
- Delineation of clear expectations (for all parties):
  - What needs to change and how will it be assessed/measured?
- Create timeline
Remediation Plan

- Step 1: Determine if remediation is needed
- Step 2: Identify the deficit(s)
- Step 3: Build a remediation plan
- Step 4: Follow-up based on plan!
Step 4: Set your plan for follow-up

- How will you know if this plan is successful?
- When will you follow-up with the learner?

Having a plan for follow-up and measurement of success helps all sides see growth and progress
- Validates the learner
- Allows the teacher to adjust aspects if needed

- Without follow-up, your plan will lose momentum quickly and easily
Remediation Tool: Heidi Combs, Jesse Markman

Step 1: Determine if remediation is needed:

<table>
<thead>
<tr>
<th>Describe the problem:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>List specific examples of the problem:</td>
<td></td>
</tr>
<tr>
<td>Is this a pattern? (if not, consider just giving feedback)</td>
<td>Y/N</td>
</tr>
<tr>
<td>Is this a reflection of a stylistic difference rather than a true deficit? (is it just a stylistic difference consider if remediation is really appropriate)</td>
<td>Y/N</td>
</tr>
<tr>
<td>Discuss the problem with the learner and list her understanding of the problem:</td>
<td></td>
</tr>
</tbody>
</table>

Step 2: Identify the deficit(s):

<table>
<thead>
<tr>
<th>Deficit Types</th>
<th>Describe the deficit under the appropriate category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge</td>
<td></td>
</tr>
<tr>
<td>Skills</td>
<td></td>
</tr>
<tr>
<td>Attitude</td>
<td></td>
</tr>
</tbody>
</table>

Step 3: Build a remediation plan:

<table>
<thead>
<tr>
<th>Action Plans and expectations</th>
<th>Collaboratively build your action plans with your learner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expectations for the learner</td>
<td></td>
</tr>
<tr>
<td>Action plan for the learner</td>
<td></td>
</tr>
<tr>
<td>Expectations for the teacher</td>
<td></td>
</tr>
<tr>
<td>Action plan for the teacher</td>
<td></td>
</tr>
</tbody>
</table>

Step 4: Set your plan for follow-up:

<table>
<thead>
<tr>
<th>How will you evaluate change?</th>
<th>Follow-Up Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>When will you evaluate change (check-in)?</td>
<td></td>
</tr>
<tr>
<td>Follow-up actions for the learner</td>
<td></td>
</tr>
<tr>
<td>Follow-up actions for the teacher</td>
<td></td>
</tr>
</tbody>
</table>
Your turn!
Large Group Case Practice

- Take 10 minutes to work individually
- Select our prepared case, or a case that is vexing you or vexed you in the past.
- Work through the case using the Remediation Tool (i.e. fill in your blank template based on your case)
  - You may need to make an educated guess for some of the information if it is a situation that is evolving
- Get prepared to share some of what you did on your own with the larger group
Large Group Case Practice

- Let’s work through the prepared case for those who chose that
  - How did you complete the plan?
  - What parts do you think would be the most difficult?
- In historic cases had you followed the steps?
- Any sticking points?
- Any patterns?
Take home points

- Being familiar with the key steps of teaching can help with feedback and remediation.
- Using a structure for feedback is SO helpful.
- Remediation is most successful when developed in a structured way through a collaborative partnership.
- Don’t wait too long or the window of opportunity closes.
- You get better at all of this with practice.