

# PORTFOLIO FACULTY DEVELOPMENT

CREATING A COMMUNITY OF PRACTICE:  
PROGRESS REVIEW COACHING FOR THE ACADEMY SCHOLAR

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# DISCLOSURE

- Relevant relationships with commercial entities
  - None
- Potential for conflicts of interest within this presentation
  - None
- Steps taken to review and mitigate potential bias
  - N/A

## SESSION OBJECTIVES

By the end of this session, you will be able to:

- Define your role as coach during the one-on-one progress review meetings
- Review the MD Program Learner Chart and its utility for the progress review meetings
- Describe key elements of the R2C2 model of facilitated feedback for coaching
- Create a community of practice within which to share challenges and successes that arise during progress review meetings as they relate to CBME, supporting student wellness and career development

## SESSION OUTLINE

- Introduction to Progress Review Meetings
  - Defining your role as a coach
  - Preparing for the progress review meetings
  - MD Learner Chart overview
- R2C2 model
- Career development and electives
- Supporting student wellness

# INTRODUCTIONS

What is one thing you've done in Portfolio this year that has been most effective?



ARE YOU A:

(A) Academy Scholar

(B) Junior Scholar

HAVE YOU LED PROGRESS REVIEWS IN THE PAST?

(A) Yes, I have led progress reviews before

(B) No, this is my first time



# INTRODUCTION TO THE PROGRESS REVIEW MEETINGS



# YOUR ROLE

In the **small group sessions**, you are a **facilitator**

- Listen openly to the students share their experiences and reflect in a non-judgmental, open environment

During the **progress review meetings**, you advise and **coach** the students

- Build a relationship with the student
- Explore their reactions and goals for learning
- Coach for performance change

# HOW THE PROGRESS REVIEW MEETINGS WORK

## Who:

- Academy Scholar and individual student

## When:

- Twice yearly in Y1-3; once in Y4
  - Y1: Jan 29 and Feb 5; April 8 and 15
  - Y2: Dec 4; April 8 and 15
  - Y3: Jan 11; April 25
  - Y4: March 7
- 30-minute meetings
- Specified date(s), but some flexibility

## Where:

- Virtual or in-person

# PURPOSE OF THE PROGRESS REVIEW MEETINGS

- During the progress reviews, you act as a **coach** and **mentor** to:
  - Review performance and progress in MD program thus far
  - Check-in with the student regarding their wellness and career development
  - Explore challenges, brainstorm strategies for improvement, review goals

# PREPARING FOR THE PROGRESS REVIEW MEETINGS

## Students will:

- Prepare a progress review report: written reflection **and** personal learning plan
- Submit these documents on OASES prior to meeting

## Scholars will:

- Set up the Zoom meeting if meeting virtually
- Review the student documents on OASES and prepare feedback
- Review the Learner Chart
- Complete MedSIS small-group meeting evaluations

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## Personal Learning Plan Template (You must include this chart with your report)

<b>Learning Goals</b> – minimum 3 (What key knowledge, skills and attitudes do you plan on acquiring? Think about immediate, medium and long term timelines)	<b>Learning Resources and Strategies</b> (How are you going to learn it?)	<b>Evidence</b> (How will you know that you have learned it? Consider specific and measurable outcomes)
1.		
2.		
3.		

# PROGRESS REVIEW REPORT: PERSONAL LEARNING PLAN



# PROGRESS REVIEW REPORT: WRITTEN REFLECTION

- Reflect on your **personal experience of the medical school journey**
- Reflect on your **academic performance data**, using the assessments in the MD Program Learner Chart
- Using your assessment data in the MD program Learner Chart, in addition to other feedback you may have received, **describe your strengths and opportunities for growth**, using the CanMEDS roles as a framework

# PROGRESS REVIEW REPORTS: ACCESSING OASES

Assignment Name:	Student Name:	Student Number:	Status
Y3 Progress Review Report 1- Draft (2022-23)			X Incomplete
<b>Assignment Instructions</b>			
<ul style="list-style-type: none"><li>This assignment link contains your student's first draft Progress Review Report for this year. You are not expected to mark this version but you may wish to provide your student some written feedback here to help them finalize their report. However, this is not required as you will give them feedback during your one-on-one progress review meeting on December 8.</li><li>You can find the Progress Review Guidelines (for students) and the Progress Review FAQs on the Clerkship Tutor Community portal and Year 3 - <a href="https://meded.utoronto.ca/meded/na/">https://meded.utoronto.ca/meded/na/</a>.</li></ul> <p>If you experience any issues accessing your students' reports, please contact the portfolio office at <a href="mailto:portfolio.ums@utoronto.ca">portfolio.ums@utoronto.ca</a>. If you have any concerns about any of your students or the content of a student's report, please contact the Portfolio Faculty Lead, Neil Bernhart at <a href="mailto:portfolio.director@utoronto.ca">portfolio.director@utoronto.ca</a>, and Associate Faculty Lead, Lindsay Herzog at <a href="mailto:lindsay.herzog@utoronto.ca">lindsay.herzog@utoronto.ca</a>.</p> <p><b>**Remember to delete the student's files from your computer after reviewing them. Please check your Downloads folder and clear your Recycle bin.</b></p>			
<b>View submission</b>		<b>Submission Date</b>	
<a href="#">Draft_Progress_Review_Report_1.pdf</a>			
Click the link to download and view your submission			
<b>Assessment</b>			
<input type="radio"/> Meets assignment requirements			
<input type="radio"/> Does not meet assignment requirements			
<input type="radio"/> Unable to assess			
<b>Feedback to Student:</b>			
<p>B I [bulleted list icon] [numbered list icon] [link icon] [undo icon] [redo icon] ?</p> <div style="border: 1px solid #ccc; height: 150px;"></div>			



# PREPARING FOR THE PROGRESS REVIEW MEETINGS

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- **Review the Learner Chart**
- Complete MedSIS small-group meeting evaluations

# LEARNER CHART

<https://apps2.med.utoronto.ca/learnerchart/>

MD Program  
**Learner Chart**

Logged in as:  
**Lynette Terrill**

Viewing  
--

Learners  
Logout

### Learners overview

Name or UTORid  Class #

Results found: 514

- ▶ Kima Greggerson
- ▶ Student Two
- ▶ Student Three

- Contains all student assessment data
- Tells the student's story of how they are achieving competency according to the CanMEDS roles
- Strictly confidential

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**YOUR ROLE AS A COACH IN THE  
PROGRESS REVIEW MEETINGS**

# YOUR ROLE

In the **small group sessions**, you are a **facilitator**

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- Build a relationship with the student
- Explore their reactions and goals for learning
- Coach for performance change

## YOUR ROLE AS A COACH IN THE PROGRESS REVIEW MEETINGS

- Will provide feedback and guide the student through further reflection on their academic journey
- Will also help coach the student on strategies that can be integrated into their personal learning plan
- After the meeting, the student will update their progress review report and their personal learning plan, to reflect the mutually agreed upon learning goals
- After the meeting, the student will submit the revised report which will be reviewed by you



## **PSYCHOLOGICAL SAFETY**

*A psychologically safe environment is one where learners feel comfortable asking questions, taking risks, making mistakes, and asking for help. They feel respected, and that their efforts and skills are valued (Edmonson, 1999)*





## CREATING SPACE FOR DIALOGUE IN THE PROGRESS REVIEW MEETINGS

<b>Discussion</b>	<b>Dialogue</b>
Cognitive process	Affective/experiential process
Authority valued	Authority shared
Goal is to reach a solution	Goal is to generate new questions, perspectives, possibilities

POLL: ARE YOU FAMILIAR WITH THE R2C2  
MODEL OF FACILITATED FEEDBACK?

(A) I've heard of it before but don't use it

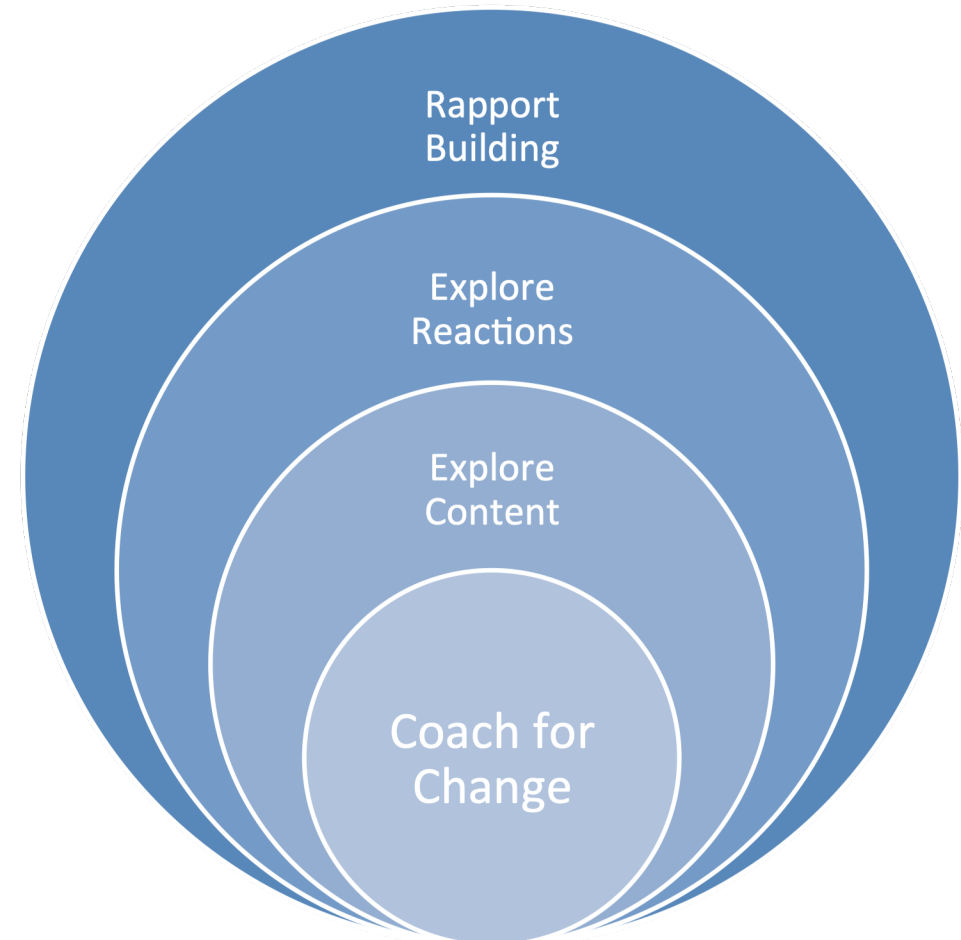
(B) I've heard of it before, and have used it

(C) I've never heard of it before

# The R2C2 Facilitated Feedback Model

1. Build rapport and **relationship**
2. Explore **reactions** to and perceptions of the data/report
3. Explore understanding of the **content** of the data/ report
4. **Coach** for performance change

Sargeant, et al. (2015) *Academic Medicine*



# Phase I: Build rapport and RELATIONSHIP

**Goal:** Engage the student, build relationship, learn about their context

- Explain the purpose of the Progress Review session and the meeting
- Outline the agenda to:
  - Review assessment data and gaps;
  - Discuss their reactions to the data and what it means to them;
  - Develop an action plan / personal learning plan from the data

*“Tell me about your experience completing this review”*

*“I’d like to hear about med school, challenges, what you enjoy”*

*“What would you hope to get out of this Progress Review Meeting?”*

## Phase 2: Explore REACTIONS to and perceptions of the data

**Goal:** For the students to feel understood and to know their views are heard and respected

*“What were your initial reactions? Anything particularly striking?”*

*“Did anything in your Learner Chart surprise you? Tell me more about that....”*

*“How do these data compare with how you think you were doing? Any surprises?”*

*“Based on your reactions, is there a particular part that you would like to focus on?”*

- Be prepared for expression of negative reactions and validate
  - *“It’s difficult to hear feedback that disconfirms how we see ourselves”*

## Phase 3: Explore student understanding of the **CONTENT** of the data

**Goal:** For the student to be clear about what the data mean for their learning and the opportunities for change suggested by the data

*“Was there anything in the learner chart that didn’t make sense to you?”*

*“Anything that you’d like to explore further or comment on?”*

*“Anything that struck you as something to focus on”*

*“Do you recognize a pattern?”*

# Phase 4: COACH for performance change

**Goal:** For the student to engage in “change talk” and develop an action plan that they feel is achievable

- Consider coaching as:
  - guiding the development of goals and activities to achieve them
  - supporting self-directed learning
  - the “skill of offering solutions.”
  - ensuring a concrete plan is developed

*“When we meet for our next progress review, is there anything you would like to see changed?”*

*”What actions will you have to take?”*

*“Who/what might help you with this change?”*

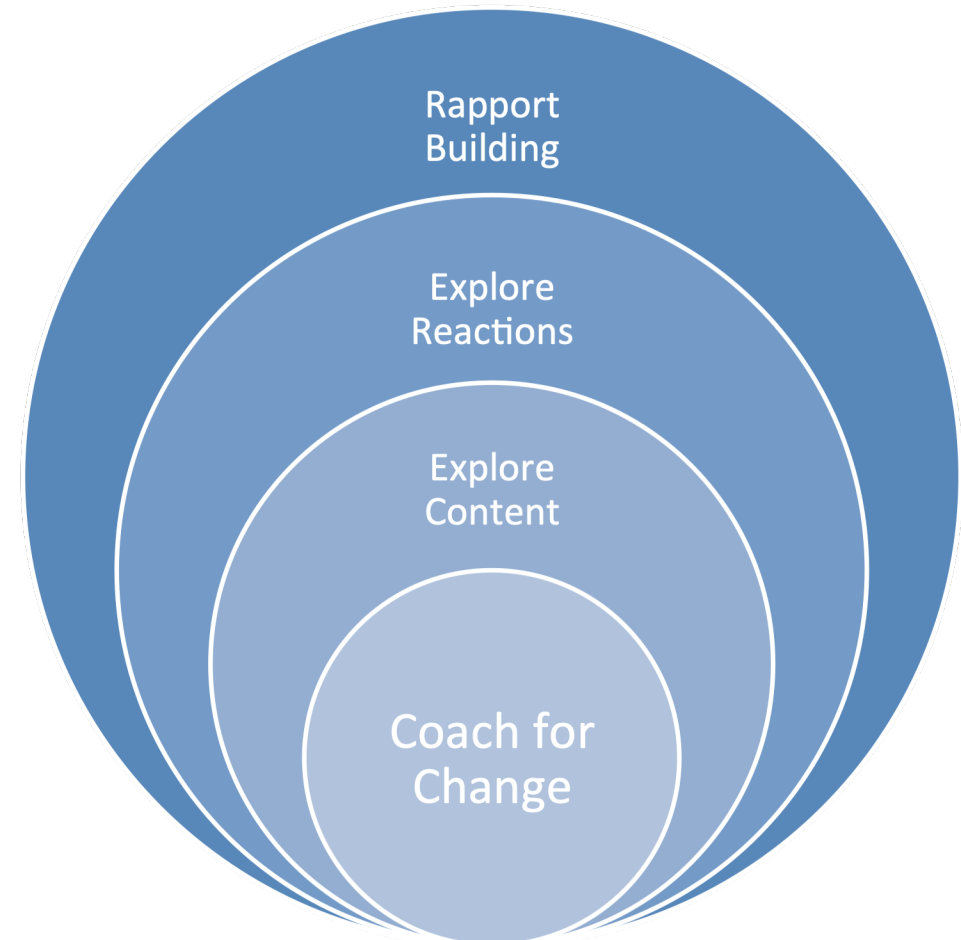
*“What might get in the way?”*

*“Do you think you can achieve it?”*

# The R2C2 Facilitated Feedback Model

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## R2C2 VIDEOS



- R2C2:A Primer for Portfolio Academy Scholars on Facilitated Feedback
- Role play of student and senior scholar engaging in a facilitated feedback discussion (Part 2)
- Feedback on Role Play (Part 3)

A photograph of two hikers on a rocky mountain peak. One hiker, wearing a yellow jacket and a backpack, is standing and reaching out to assist another hiker who is sitting on the ground. The second hiker is wearing a red jacket and a backpack. The background shows a vast, cloudy sky. The text "SUPPORTING STUDENTS DURING THE PROGRESS REVIEWS" is overlaid on the bottom of the image in a white, bold, sans-serif font, enclosed in a black rectangular border.

**SUPPORTING STUDENTS DURING  
THE PROGRESS REVIEWS**

# CAREER ADVISING IN THE MD PROGRAM

## HOW TO COUNSEL SECOND AND THIRD YEAR STUDENTS ON CAREERS AND ELECTIVES

### A Guide for Faculty

RESOURCES



#### DO'S & DON'TS

**Do** acknowledge the anxiety, uncertainty and stress associated with decisions around careers and electives.

**Do** remind students in the foundations years to balance their career exploration efforts with their medical expert learning and personal interests and wellness.

**Do** refer to and reinforce existing MD Program resources (listed to the right). Encourage students to seek out guidance and supports from the career counsellors at OHPSA.

**Do** remind students that it is normal for them to be unsure of what specialty they want to pursue, even in third year.

**Don't** minimize the emotions students may be feeling about the electives and CaRMS process. Electives have become a competitive and strategic process.

**Don't** provide false reassurance. The strategies previously used for electives and CaRMS may no longer be relevant.

**Don't** make assumptions about the electives or CaRMS process. If in doubt, refer the student to the Electives or OHPSA offices

**Don't** provide advice in absolutes.  
"You must do this elective."  
"Go to this site."  
"Meet this individual."

**Don't** belittle, insult or minimize any career choice or specialty – even in jest.

**Don't** use the term "backing up" when speaking about parallel planning. This makes it sound like the second specialty of interest holds less importance and sends the wrong message.



## WELLNESS & DEALING WITH STUDENTS IN DISTRESS

### Principles:

- Do not take a history
- You are not in a clinical role with the student
- Do not offer therapy
- Do not promise absolute confidentiality
- Determine if the situation is, urgent, emergent, non-urgent
- Reach out to Portfolio Leadership if you are unsure or have questions

# OLA

Core Services

Career Counselling

Personal Support

Academic and Clinical Skills Enhancement

Service Learning, Diversity Outreach, and Student Events/Clubs

OLA liaises with other networks

COMMUNITY  
OMA – PHP

CaRMS

UNIVERSITY  
OF TORONTO

TEMERTY  
FACULTY OF  
MEDICINE

MEDICAL  
EDUCATION

MAA

LEARNER  
LEADERSHIP

# ACCESSING OLA


<https://md.utoronto.ca/student-assistance>

Office of Learner Affairs (OLA) <sup>(a)</sup>

- Community of Support <sup>(a)</sup>
- Summer Mentorship Program
- Student Mistreatment <sup>(a)</sup>
- Academic Calendar
- Incoming Students
- Resources for Indigenous Students
- Registration Requirements & Requests
- Research Opportunities >
- Graduation & Alumni
- Student Tools & e-Resources
- Finances & Awards >
- Student Assistance
- School Absences

## Student Assistance

The Student Assistance section is intended as a quick reference for medical students at the University of Toronto who are experiencing an urgent or crisis situation.



This section provides information and links to resources on key issues that may arise, but does not connect you directly to assistance.

**If your health or safety, or the health or safety of someone else, is at risk, please call 911 or seek medical attention right away.**

**Personal Issues & Academic Concerns >**

Dealing with personal issues? Please know that you are not alone. There are many people who can help you, no matter what problem you might be facing.

**School Absences >**

We recognize that there are instances, which may necessitate you to take time away from the MD Program. Learn about planned and unplanned absences.

**Student Mistreatment >**

If you are experiencing mistreatment, including incidents of discrimination, harassment, mistreatment and other unprofessional behaviour, connect with us and get assistance.

**Student Outbreak/exposure Management Plan (StOMP) >**

If you receive a notification that you have been exposed to COVID-19 while on core rotation/elective placement or within the community, the Student Outbreak/exposure Management



## Office of Learner Affairs

Home > Office of Learner Affairs

During your time at the Temerty Faculty of Medicine, you'll encounter a variety of new experiences and opportunities. Our team is here to support and guide you as you work toward reaching your potential and achieving your academic and professional goals. While you prepare for a career helping our patients maintain and improve their health, we want to help you nurture your own well-being.

We're committed to promoting resilience, wellness, personal growth and social responsibility among our learners and I welcome you to explore the range of services and resources available through our office.

[Book an Appointment](#)

We're with you

Navigate. Elevate. Advocate.

## Our Services



[Academic and Clinical Skills Enhancement >](#)



[Personal Counselling >](#)



[Career Counselling >](#)



[Accommodation and Accessibility >](#)

# ACCESSING STUDENT MISTREATMENT RESOURCES

<https://md.utoronto.ca/student-assistance>

Office of Learner Affairs (OLA)

Community of Support

Summer Mentorship Program

Student Mistreatment

Academic Calendar

Incoming Students

Resources for Indigenous Students

Registration Requirements & Requests

Research Opportunities

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**Student Assistance**

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Home > Learner Mistreatment

What is Mistreatment?

Distinction Between Discussing, Disclosing and Reporting

How Do I Disclose or Report?

Who to Contact

Protections Against Retaliation

Confidentiality and Anonymous Disclosures/Reports

Structural Reporting

Recording Without Reporting

Submit a Disclosure

Next Steps Following a Disclosure or Report

MD Learner Mistreatment Protocol

PGME Guidelines for Managing Disclosures

Additional Supports

Learner Experience Reports

Give Us Feedback

## Learner Mistreatment

We are here for you, feel free to contact us if you want to discuss, disclose, or report something that has happened.

I would like to:

**Connect With a Designated Leader**

**Disclose or Report Mistreatment**

Call 911 or seek immediate assistance from onsite security or other authorities if you are concerned about impending harm to yourself or others. Contact a designated MD or PGME Program leader only after your safety is ensured.

# FACULTY SUPPORTS

<https://temertymedicine.utoronto.ca/reporting-pathways-faculty-concerns-and-grievances>

## Reporting Pathways for Faculty Concerns and Grievances

The Temerty Faculty of Medicine (TFOM) is committed to providing a transparent and responsive process to resolve concerns and grievances.

The University of Toronto has multiple processes for concerns and grievances depending on the nature of the concern and the faculty members involved. The Office of Clinical and Faculty Affairs focuses on Clinical (MD) Faculty.

The Clinical and Faculty Affairs Team is available to all TFOM faculty to provide support and guidance. For concerns that are not under our purview, we will gladly assist in connecting faculty to the appropriate individuals and resources.

### Definitions

Expand All

Clinical Faculty



Concern



Disclose/Disclosure



Grievance



Inappropriate Behaviour



### Concern and Grievance Pathways

I am a Non-Clinical  
(MD) Faculty  
Member

I am a Clinical (MD)  
Faculty Member



# PORTFOLIO FACULTY DEVELOPMENT RESOURCES

## Cornerstones of Portfolio

START COURSE

### Preparing for Your Progress Review Meetings for Senior Academy Scholars

This component includes resources to help you prepare for your one on one progress review meetings with the students, including accessing the Learner Chart, guidelines for the progress review report, and a primer and videos on a facilitated feedback model (R2C2).

*To access any of the resources, select and click on a link on the right.*

[Preparing for Progress Reviews: Faculty Development Presentation](#)

[Accessing the Learner Chart](#)

[Progress Review Report Guidelines](#)

[Primer - Portfolio Academy Scholars: Facilitated Feedback](#)

[Primer & Video - R2C2 and Feedback on Role Play](#)

### Additional Portfolio Scholar Resources

[Careers and Electives](#)

[Office of Learner Affairs](#)

[Supporting Students](#)

[Portraying Social Identities](#)

[Learner Mistreatment - Primer for Teachers](#)

[Learner to Learner Mistreatment](#)

[Assessing Student Professionalism](#)

[Professionalism and Attendance in the MD Program](#)

[Online module](#) containing everything you need to know to be an excellent Portfolio Scholar

Additional Faculty Development materials on **Elentra** and on the [Portfolio Scholar Faculty Development website](#)

# QUESTIONS OR COMMENTS?

**Faculty Lead: Dr. Nirit Bernhard**

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**Associate Faculty Lead: Dr. Lindsay Herzog**

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**Portfolio Coordinator: Olga Serebrennik**

[portfolio.ume@utoronto.ca](mailto:portfolio.ume@utoronto.ca)



Please evaluate this session!  
Your feedback is very  
important to us