Integrating Self-Assessment in CPD Activities

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Conflict of Interest

I have no sponsorship or support to declare
In this workshop...

- In this active workshop participants will practice and evaluate practical, hands-on ways of integrating self-assessment in CPD activities. This workshop has brought together some examples from CPD colleagues from faculties across the country, who share their favourite ways of helping to make self-assessment happen. We would like you to contribute some of your examples as well.
Learning Objectives

• At the end of this session participants will be able to:
• Define and describe self-assessment approaches in CPD programs in general and in your own context
• Describe and assess methods and resources that can help CPD providers integrate SDL
• Assess their own skills and needs in integrating self-assessment into their local CPD programs
Let’s Practice Self-Assessment (SAss?)

Exercise: table groups, then all
- 5-10 min table discussion
- 10 min. large group

- In a meeting with your CPD peers...
- Your goal is to integrate and/or add more self-assessment activities in your CPD programs.
- Before you start you want to self-assess your own knowledge and skills with regards to self-assessment.
- What steps will you take?
Report, findings results...

• Actions

• Ideas

• Challenges barriers
Definition and purpose of SAss

SAss

• **Purpose**: Improvement of skills, knowledge, performance

• **Part of the process of self-directed learning (SDL)**

SDL:

• A process that is focused on improving practice performance and patient outcomes'.

• Participant led: individuals take initiative either individually or with others intra-(or inter) professionally
Self-directed Learning (SDL)

SDL Actions:
- Diagnose their own learning needs
- Formulate goals
- Identify human and material resources for learning
- Choose and implement appropriate learning strategies
- Evaluate learning outcomes

Must be put into action or it’s moot.

(Modified definition from Knowles (1975), Self-Directed Learning (SDL) National Working Group Terms of Reference)

Not the same as Royal College Self-Assessment Programs (SAPs)

- “They are assessment strategies to help physicians develop an effective continuing **professional development plan** linked to their professional roles and responsibilities.”
  

- “They provide data and feedback to guide learning and continuous improvement in the future...should probably be more accurately referred to as Knowledge Assessment programs. “

Craig Campbell

- SAP: Solo activity?, programs are often online
Self-assessment can also include

- Questions at clinical setting
- Coaching
- Point-of-care learning tools
- Interactions with colleague
- +?
Skill level in Self-Assessment

• However
• “Several studies highlight that physicians are not very accurate at assessing their competence in clinical domains when compared to objective measures of knowledge and performance.
• …research suggests that physicians will benefit from learning programs that encourage them to reflect on their clinical practice, continuously seek answers to clinical problems they face, compare their knowledge and skills to clinical practice guidelines and benchmarks, and seek feedback from peers and their health care team.”
• Ivan Silver
And the younger generation?

- A self-administered questionnaire covering the different areas of clinical competency constructed on a five-point Likert scale was used for data collection.

Results:

- “Overall mean scores for experts' and graduates' assessments were 3.40 and 3.63, respectively ($p=0.035$).
- Almost 87% of the graduates perceived their competency as good and very good in comparison with only 67.7% by experts.
- Graduates in general, and those of younger age groups in particular, tend to overestimate their clinical skills and competency.”

Abadel and Hattab BMC Medical Education 2013, 13:24

http://www.biomedcentral.com/1472-6920/13/24
What else affects our self-assessment?

• Receiving feedback is complicated - from cognitive domains, sense of “fairness” of the process or source, the effect of cognitive errors or bias...
  Sargeant, 2015

• The emotional response
  – impacted acceptance
  – impelled action or inaction
  – impacted patient-management behavior

• Emotion intensity was associated with type of action taken (defensive, proactive, retroactive).
  Payne VL, Hysong SJ - Model depicting aspects of audit and feedback...
Exercise

Receiving feedback: factors
• sense of "fairness" of the process or source
• cognitive errors or bias
• +?

Table groups
• What do you (or would you do) to mitigate these factors? Add other factors if you wish.
Example: The Role of Practitioners in Indigenous Wellness

- Members of the Indigenous community shared their experiences and described what they need practitioners to learn and understand for culturally safe care
- Focus is on the CanMEDS roles of communicator, collaborator, and health advocate
- Course is delivered via unscripted interviews with Indigenous scholars and community members followed by an opportunity to respond to what is shared in the videos
- After each module participants write in reflective journal, (with a prompting question)
  - Reflective journals are ‘scored’ using the reflection rubric developed by Hedy Wald

For more information about the course contact heather.stenerson@usask.ca
Fostering and Evaluating Reflective Capacity in Medical Education: Developing the REFLECT Rubric for Assessing Reflective Writing

Hedy S. Wald, PhD, Jeffrey M. Borkan, MD, PhD, Julie Scott Taylor, MD, MSc,

Abstract

Purpose
Reflective writing (RW) curriculum initiatives to promote reflective care are proliferating within medical education. The authors developed an evaluative tool that can be effectively applied to assess students’ reflective levels and assist with the process of providing individualized written feedback to guide reflective capacity promotion.

Conclusions
The REFLECT is a rigorously developed, theory-informed analytic rubric, demonstrating adequate interrater reliability, face validity, feasibility, and acceptability. The REFLECT rubric is a reflective analysis innovation supporting development of a reflective clinician via formative assessment and enhanced crafting of faculty feedback to reflective narratives.
## Appendix 1
The REFLECT (Reflection Evaluation For Learners’ Enhanced Competencies Tool) Rubric

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Habitual action (Nonreflective)</th>
<th>Thoughtful action or introspection</th>
<th>Reflection</th>
<th>Critical reflection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Writing spectrum</td>
<td>Superficial descriptive writing approach (fact reporting, vague)</td>
<td>Elaborated descriptive writing approach and impressions without reflection</td>
<td>Movement beyond reporting or descriptive writing to reflecting (i.e., attempting to understand, question, or analyze the event)</td>
<td>Exploration and critique of assumptions, values, beliefs, and/or biases,</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level</th>
<th>Analysis and meaning making</th>
<th>Optional minor criterion: Attention to assignment (when relevant)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Habitual action</td>
<td>No analysis or meaning making</td>
<td>Poorly addresses the assignment question and does not provide a compelling rationale for choosing an alternative</td>
</tr>
<tr>
<td>Thoughtful action</td>
<td>Little or unclear analysis or meaning making</td>
<td>Partial or unclear addressing of assignment question; does not provide a compelling rationale for choosing an alternative</td>
</tr>
<tr>
<td>Reflection</td>
<td>Some analysis and meaning making</td>
<td>Clearly answers the assignment question or, if relevant, provides a compelling rationale for choosing an alternative</td>
</tr>
<tr>
<td>Critical reflection</td>
<td>Comprehensive analysis and meaning making</td>
<td>Clearly answers the assignment question or, if relevant provides a compelling rationale for choosing an alternative</td>
</tr>
</tbody>
</table>
Self-directed Learning: COMPASS

4. How do I develop my Personal Learning Project?

1. How would you define directed learning?

5. Rate your self-directed learning skills by comparing current and desired ability in formulating a personal learning plan. (1 = none, 2 = somewhat, 3 = medium, 4 = high, 5 = very high)

<table>
<thead>
<tr>
<th>CURRENT</th>
<th>Self-Directed Learning Skill</th>
<th>DESIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>a</td>
<td>Recording questions as they occur in my clinical practice</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Formulate question(s) for developing a personal learning plan</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Appraise the relevance of resources to answer my questions</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Review the learning objectives of a group activity I might attend</td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Plan my clinical practice to pursue SDL activities</td>
<td></td>
</tr>
<tr>
<td>f</td>
<td>Persevere in exploring additional resources to answer my questions</td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Stop and reflect if I have achieved my learning outcomes</td>
<td></td>
</tr>
</tbody>
</table>

Step 4: Assess what you have achieved, i.e., your learning outcomes which can...
Some results from COMPASS

Figure 4: Gap Analysis in Learners’ Self-reported Skill Levels to Formulate a Personal Learning Plan (PLP)\(^6\) (Mean Ratings\(^{11}\))

- Stop and reflect if I have achieved my learning outcomes: 4.22
- Persevere in exploring additional resources to answer my questions: 4.22
- Plan my clinical practice to pursue SDL activities: 3.85
- Recording questions as they occur in my clinical practice: 4.07
- Appraise the relevance of resources to answer my questions: 4.11
- Formulate question(s) for developing a personal learning plan: 4.04
- Review the learning objectives of a group activity I might attend: 4.04
Important Notice: This tool is in the beta testing phase. Mainpro+ credits will not be earned for using this tool until it is certified and officially launched.

Shine a Light on Your Learning:
A Self-Directed Assessment Tool

https://survey.ubc.ca/s/self-assessment_tool/
Shine a Light on Your Learning: A Self-Directed Assessment Tool

1. Define your topic
2. Conduct self-directed assessment
3. Create a plan for improvement
4. Evaluate the implementation

Purpose
Think of this tool as your coach. Although it doesn’t wear a tracksuit or shout encouragement from the sidelines, its role is to support you in being exceptional in what you do. Initially, this tool will guide you through a self-directed assessment of an area(s) of practice you may be uncomfortable with or wish to improve upon. Next, it will help you develop an action plan to address that area of practice, and – after you have implemented your plan – guide you through evaluating the effect of your plan.

Upon completion, you will be able to:
1. Reflect on an area of practice where you feel challenged or uncomfortable
2. Identify available sources of information for conducting a self-directed assessment
3. Formulate an action plan for practice/quality improvement
4. Determine the effectiveness of a practice/quality improvement plan
5. Describe how to use health data or information for practice improvement
• What about in our conferences?
• Example: Pre and post reflection
• Individual attending a conference. Instead of doing a post-event reflection, what about a pre-event reflection, similar to what we use for the pre-event Mainpro+ surveys for 3-point activities.

• Survey1 and questions?
• 1. In reflecting on the above procedures, can you describe any particular issues or interactions that are challenging?
• 2. Can you identify any of the above skills that you find specifically difficult? Could you explain why? (For example: lack of practice, don’t see a strong need for it, etc.)
Post survey

Questions about specific skills ask about equipments, frequency, confidence levels.

Plus these questions:

“Looking back at the CPD Skills Day, what impact has it had on your practice? Could you give an example of a case that you handled differently because of the Skills Day?”

“Please list any barriers that you encountered after this skills day with performing these skills/procedures. Where possible, please specify which workshop.”

What other questions would you suggest?

Barriers? And how to overcome them?

What other means or tools could the average very busy family doctor use to indicate or measure change?

Moore, McGee, 2015
Exercise: for each of the following, how would you insert into a CPD activity?

SDL Actions:
- Diagnose their own learning needs
- Formulate goals
- Identify human and material resources for learning
- Choose and implement appropriate learning strategies
- Evaluate learning outcomes
Abadel and Hattab BMC Medical Education 2013, 13:24, How does the medical graduates' self-assessment of their clinical competency differ from experts' assessment?
http://www.biomedcentral.com/1472-6920/13/24


Dr. Heather McGee & Dr. Heidi Moore, 2015, An assessment of the effectiveness of Continuing Professional Development (CPD) skills workshops for family physicians, Family Medicine Resident Scholarly Project. Project Supervisor: Dr. Eric Wooltorton


Royal College of Physicians and Surgeons, Definition of Self-Assessment


• Thank you

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