# Teaching Tool 5 – Case Report

CanMEDS Leader

## **Leader Role Competencies**

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### Instructions for Learner:

* Observe and take (non-identifying) notes on your Leader Role activities in day-to-day practice
* Remember to be cautious about confidentiality when taking notes
* Review with faculty as arranged or initiate a review of your case reports to get feedback

Resident name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Resident role in this location:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rotation/Site/Organization: (include details about when, where, how long, type of service)

### A. Resources For This Rotation/Site/Organization

1. List the KEY resources, guidelines, policies and protocols that you used to understand your role and responsibilities.  
   (i.e. job description, on call responsibility phone contact list)

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1. List OTHER key sources for information/assistance that were available for this Rotation/Site/Organization?   
   Are there gaps?
2. Rate your approach to those elements of leadership that apply in this case that you are reporting on (e.g. leadership process, management, stewardship, quality improvement, patient safety). Rate your approach by including your own viewpoint and remember to include the feedback of others to inform your ratings. List important areas or ideas for improvement that are priorities for you.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| A. Leadership process  IN THIS CASEi | Rate your approach IN THIS SITUATION. Explain rating | | | | | | Areas or ideas for priority improvement? |
| 1  Very  poor | 2  Poor | 3  Solid  competent | 4  Very  good | 5  Superb | Not  applicable |
| Asks what needs to be done |  |  |  |  |  |  |  |
| Asks what is right for the patient(s), problem, organization etc. |  |  |  |  |  |  |  |
| Develops action plans |  |  |  |  |  |  |  |
| Takes responsibility for decisions |  |  |  |  |  |  |  |
| Takes responsibility for communications |  |  |  |  |  |  |  |
| Focuses on opportunities rather than problems |  |  |  |  |  |  |  |
| Leads productive meetings |  |  |  |  |  |  |  |
| Thinks and says “we” rather than “I” |  |  |  |  |  |  |  |

Other notes/reflections:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| B. Management process  IN THIS CASE[[1]](#endnote-1) | Rate your approach IN THIS SITUATION. Explain rating | | | | | | Areas or ideas for priority improvement? |
| 1  Very  poor | 2  Poor | 3  Solid  competent | 4  Very  good | 5  Superb | Not  applicable |
| Ensures understanding of work and timelines |  |  |  |  |  |  |  |
| Identifies the priority tasks and timelines |  |  |  |  |  |  |  |
| Establishes steps and sequence to deliver outcomes on time |  |  |  |  |  |  |  |
| Shares work through effective delegation |  |  |  |  |  |  |  |
| Assigns people important activities |  |  |  |  |  |  |  |
| Assigns tasks based on match/fit of competencies and strength |  |  |  |  |  |  |  |
| Assigns tasks based on learning needs |  |  |  |  |  |  |  |
| Monitors people’s progress |  |  |  |  |  |  |  |
| Communicates and clarifies with people |  |  |  |  |  |  |  |
| Coaches peoples’ progress and success |  |  |  |  |  |  |  |
| Flexibly modifies plans with new, emerging situations |  |  |  |  |  |  |  |
| Deploys people with new, emerging situations |  |  |  |  |  |  |  |
| Integrates personal and professional priorities |  |  |  |  |  |  |  |
| Uses tools and resources effectively to achieve outcomes |  |  |  |  |  |  |  |

Other notes/reflections:

1. Summarize your TOP two or three areas of strength
2. Planning for improvement

|  |  |  |  |
| --- | --- | --- | --- |
| # | Summarize your TOP two or three areas that need priority improvement over the next four to eight weeks? | How are you going to work  on your priorities over the next four to eight weeks? | How will you know that you have achieved the needed improvement in your priority areas? |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |

1. Drucker PF. *What makes an effective executive? Harv Bus Rev*. 2004;82(6):58-63-136. [↑](#endnote-ref-1)