

Setting Expectations –

IV. Follow Through: Providing Feedback

Introduction

For the community preceptor, teaching is not a full-time job. When there are long periods of time between precepted rotations, it can take a few days to get back into the routine of teaching. Yet those first days of a rotation are critical for helping a learner adapt to a new practice environment and a new preceptor.

Developing a system for orienting and clarifying expectations with a learner can help each rotation get off to a good start. While the first day of a rotation (usually Monday) is almost always hectic, taking the time to orient the learner on that first day saves the preceptor time and energy the rest of the rotation by preventing learner mistakes and unintended transgressions of office norms. A systematic orientation also helps a preceptor tailor the rotation to different learners' particular needs. And it provides a framework for giving learners feedback and evaluating them.

This series of documents will briefly explore the four steps of setting expectations:

- 1) Orienting learners to the logistics of the practice and rotation,
- 2) Setting expectations of the learner's performance,
- 3) Selecting mutually-agreeable rotation objectives, and
- 4) Providing feedback about whether they are meeting the set expectations.**

Example

It is Tuesday evening and you are catching up on paperwork. On your calendar you see that you have a third-year medical student coming Monday for a four-week rotation, Lisa Jones.

Several months ago, the arrival of your last student coincided with a particularly busy morning at the hospital. You were delayed getting into the office and the student spent an hour reading magazines in the waiting room. You were pleased with his clinical skills, but as you filled out his evaluation form at the end of the rotation, you realized you had not observed him in some of the categories listed on the form. When you asked for his feedback about the rotation, you were surprised to hear he had wanted learn more about managing chronic back pain; this request would have been easy to meet had you known his interest.

Follow Through: Feedback About Meeting Expectations

By clarifying expectations and developing mutually agreeable rotation objectives, you have created a “road map” for the learner's education.

Over the course of the rotation, you will need to refer back to this map to make sure you are still on track. Setting expectations accomplishes little if it is not combined with feedback to the learner about whether he or she is meeting those expectations (see development sheets on Giving Feedback).

Is the learner being exposed to the clinical experiences needed on this rotation? It may be necessary to remind staff about incorporating the learner for specific clinical cases.

Is the learner meeting your expectations? Refer to the expectations and rotation objectives as you give feedback to the learner both in response to case presentations and as you debrief at the end of the day.

If the learner is not meeting your expectations, you need to let him or her know early on, so that there is ample time to modify behavior before your evaluation is completed.

Some preceptors choose to conduct a “mid-rotation evaluation”, a 30-minute exercise in which they fill out the evaluation form based on the learner's performance thus far and then go over it with the learner. This mid-rotation evaluation *is usually not a part of the final grade* and is not sent to the school or residency. It serves to show learners your assessment of their performance so far and to identify areas they need to work on for the rest of the rotation. Having learners assess themselves first using the same form will help involve them in the process, and it provides a good lead-in for your assessment. The ensuing discussion should include a plan for addressing the areas that the learner needs to work on.

At this point you may need to rethink the rotation objectives if they have proven to be unrealistic or if you have identified other areas that are a higher priority to address. In this case it is important to make sure the learner and you are both clear about any changes and have planned strategies for achieving the new objectives.

A final 45-minute debriefing session or “exit interview” provides a great opportunity to both give and get feedback. First and foremost on learners' minds is their grade. If you have initially stated clear expectations for the rotation, developed mutually agreeable rotation objectives, and then given learners consistent feedback about their performance in relation to those objectives throughout the rotation, your end-rotation evaluation of their performance should come as no surprise.

In this same session, be certain to ask for feedback from the learner about the orientation process and your expectations. What in the orientation helped the learner feel situated in the practice? What new or different topics might be included in future orientation sessions? Were your expectations realistic for this level of learner? Did the learner identify other unstated expectations of yours that should be made explicit with future learners? It can be helpful to have learners write down their suggestions at the end of the session or to take notes during this session.

The learners' feedback is important input in an assessment of the orientation process. Share this feedback with the relevant staff and encourage their assessment as well. Also review your own

observations about orientation and your expectations. Together, these three perspectives will help you identify any needed changes in the process of orientation and setting expectations.

Timeline of Activities

Before the Learner Arrives

Review the course objectives and evaluation form.
Identify your own expectations as a preceptor.
Solicit staff help in orienting learner.
Block out time(s) to meet with learner.

As the Learner Arrives

Orient learner to practice, community, and rotation.
Assess learner's level and background.
Meet with learner to discuss school, learner and your expectations for rotation.
Agree on 5-7 rotation objectives, perhaps written.
Tell other staff learner's clinical rotation objectives, so they can bring learner in for relevant cases.

During the Rotation

Refer to expectations and rotation objectives as you give learner feedback on cases presented, during daily debriefing, and at mid-rotation evaluation.
Check to make sure staff bring learner in for cases related to clinical rotation objectives.

At the End of the Rotation

Refer to expectations and rotation objectives as you evaluate learner.
Collect feedback and note changes needed in process of setting expectations for next rotation.

References

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