**Postgraduate Medical Education**

**ACADEMIC COACH**

**Suggested Guidelines**

**Preamble:**

There are many titles being used with reference to this new role within Competency Based Medical Education (CBME) e.g., faculty advisor, mentor, academic advisor, etc. For the purposes of this document, the title of **Academic Coach** will be used.

This role differs from the coaching done by the Clinical Teachers in that the Academic Coach provides coaching over time, whereas the Clinical Teacher does so in the moment.

The role of Academic Coach is significant in terms of assisting the learner in his / her academic development. The Academic Coach provides important information to the Program Director with respect to the progress of the learner, and is responsible to present a summary of the learner’s progress to the competence committee, by invitation. For programs implementing the Academic Coach, it is recommended that there be prior discussions with the Department leaders regarding ways in which the role can be recognized. The transition to Competence by Design will take place over a period of time, depending on the length of the program; it is important that programs consider the resource allocation as CBD should not negatively affect the traditional residents.

If a program decides not to have Academic Coaches, it will be important for the program to review the responsibilities assigned to this role, and how this will be accomplished elsewhere. Of importance is how resident progress issues will be represented on the Competence Committee. The role of the Academic Coach will vary for Family Medicine, where the primary family medicine supervisor plays the role of “clinical teacher” and “academic coach”, however, the overall principles apply.

There are different models as to how a program may wish to implement the role of Academic Coach; please refer to links at the end of the document. Please refer to the PGME Competence Committee guidelines for further context.

**Job Description**

An Academic Coach is a faculty member who is responsible for overseeing a learner or several learners’ clinical work and academic progress.

Academic Coaches will be expected to attend a Competence Committee meeting, if necessary, to present their assigned learner(s) educational data and participate in the review discussion, but are not mandated to do so routinely. They are not expected to be members of the Competence Committee, but in smaller departments they may be.

As a general guide, it is expected that the Academic Coach meets with each assigned learner approximately 3 times per academic year. This frequency may depend on the needs of the learner and resources available to the program. Each meeting will require approximately a total of 2.5 hours for each learner. This includes preparation time and a face-to-face meeting with the learner. Therefore, the anticipated time commitment would be approximately 7.5 – 10 hours per learner, per year.

The number of learners assigned to each Academic Coach and the duration of the Academic Coach relationship with each learner are decided by each residency program and depend on available candidates for this role, the number of learners within the program, and incentives available for the role. For example some programs may choose to have a few Academic Coaches, which each have 5 - 6 learners assigned. Other programs may have a larger number of coaches with each having 1 - 2 learners assigned.

**Appointment**

The Academic Coach may be selected by the program (or site) director with approval of the Residency Training Committee, or in collaboration with other program leadership. The Program Director should review the learner assignment, workload etc., on an annual basis.

The term of the role will differ across departments. For example, some programs may choose to assign the Academic Coach for a period of a year, other programs may choose to assign them for the duration of a specific stage of training, and other programs may choose to assign them for the entire period of residency training.

If the relationship between an Academic Coach and the Learner is not optimal, the Program Director may choose to reassign the role.

**Responsibilities:**

The responsibilities of an Academic Coach are to:

* Identify and discuss the learner’s specific educational needs and goals, and co-develop an education plan (see Appendix 1 for suggested format) at the start of each level of training. The education plan is a formative plan that is in addition to the objectives of training. The plan evolves throughout the learner’s time in the program.
* Assess the academic progress of a learner during a specific period of time by reviewing performance information generated by various assessment tools completed for the respective learner. The learner should prepare for the meeting with the Academic Coach by using the Learner Reflection form (Appendix 2) or a reflection template provided by the program. This reflection template should be shared with the Academic Coach.
* Ensure that stage specific program goals for the learner are being met.
* Provide constructive and specific feedback to the learner in an iterative manner.
* Review the learner's career plans and rotation schedule in the context of their assessment data and progress rate (see Appendix 3 for a suggested format; this report may be used for review by the Competence Committee).

**Examples – Academic Coach**:

Anesthesiology [Click here](https://cbmepg.mcmaster.ca/wp-content/uploads/2018/03/Academic-Advisors.pdf)

Pediatrics [Click here](https://www.macpeds.com/documents/ACExpectationsJuly2015.pdf)

**TEMPLATES (Programs may modify)**

* **Appendix 1: Education – co-developed by Learner and Academic Coach**
* **Appendix 2: Learner Reflection – for the Learner to use to prepare for meeting with Academic Coach**
* **Appendix 3: Learner Progress Form – for the Academic Coach to prepare for Competence Committee meeting**

**Appendix 1: Education Plan**

The purpose of the Education Plan is to provide a framework for a cycle of continuing professional development and review. The plan should support and encourage an open dialogue between learner and the Academic Coach and Program Director regarding professional and career development. This document is intended to assist in the process by providing a framework to create informed, focused learning goals with tangible outcomes, used in conjunction with the overall goals and objectives for this stage of training.

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| --- | --- |
| **Name:**  | **Date:**  |
| **PGY Level:****Stage of training, as applicable:**  | **Academic Coach:** |

**Initial Meeting:**

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| **Overall Career Goals:** **Specific Interests:** **Self-identified gaps or learning needs:**  |

**Appendix 2: Education Plan / Ongoing Learner Reflection**

**Learner to use to prepare for initial and subsequent meetings with the Academic Coach**

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| --- |
| Reflect on the multiple sources of feedback received to date. This will be specialty specific in terms of what tools the program is using. Use feedback to determine 2 - 3 specific goals for the next XXX months, in consultation with mentor/advisor, using the table below. |
| **Name:**  | **Date:**  |
| **PGY Level:** **Stage of training, as applicable:**  | **Academic Coach:** |
| **Date of Review with AC / PD: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **What are my Learning Objectives?** | **What is my trigger/ stimulus for learning?** | **What is the timeline for completion?** | **What resources will I require?** | **What do I need to do to achieve this goal?** | **What are potential barriers?** | **Outcome: How will I identify success?** |
| **1)** |  |  |  |  |  |  |
| **2)** |  |  |  |  |  |  |
| **3)** |  |  |  |  |  |  |

|  |  |
| --- | --- |
|  **Name:**  | **Date:**  |
| **PGY Level:****Stage of training, as applicable:**  | **Academic Coach:** |
| **Progress Review December (Mid-Year)**  |

|  |  |
| --- | --- |
| **Name:**  | **Date:**  |
| **PGY Level:****Stage of training, as applicable:**  | **Academic Coach:** |

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| **Progress Review April (Annual)**  |

This document will be reviewed by the Competence committee as part of the package of documents to assess resident promotion.

**Appendix 3: Learner Progress Form**

**Academic Coach use to prepare for Competence Committee meeting.**

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| --- | --- |
| **Name:**  | **Date:**  |
| **PGY Level:****Stage of training, as applicable:**  | **Academic Coach:** |

**Outline for review:**

1. Review assessment data available and gaps.
2. Discuss their reactions to data and what it means to them.
3. Develop action plan based on the data.

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| **Setting the stage:** |
| ⬜ **Review learner stage of training** | What is learner currently working on? ⬜ N/AWhat is their plan for meeting EPAs in their current block?  |
| ⬜ **Review EPAs for stage** | What EPAs are your current focus? ⬜ N/A |
| **Review of workplace based assessment data and education plan:** |
| ⬜ **Review assessments on file**  | Concerns/issues raised  Yes ⬜ No ⬜ If yes, specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| ⬜ **Reviewed EPA progress** | Concerns/issues raised on these assessment s? ⬜ N/AYes ⬜ No ⬜ \* See attached EPA summary charts for individual EPA assessment data |
| ⬜ **Reviewed procedure log and/or Procedure forms** | Learner keeping procedure log? Yes ⬜ No ⬜ Procedures successfully completed in log:  |
| ⬜ **MSF reviewed** | - Concerns/issues raised on MSF? Yes ⬜ No ⬜ If yes, specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Review non-workplace based assessments/objective testing:** |
| ⬜ **Reviewed performance on OSCE**  | OSCE score \_\_\_\_\_\_\_\_\_\_ ⬜ N/AStations passed: \_\_\_\_\_\_\_ PGY year average: \_\_\_\_\_\_Issues/concerns raised \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| ⬜ **Discussed MCQ ITE performance**  | ITE score \_\_\_\_\_\_\_\_\_\_\_\_ ⬜ N/A PGY year average \_\_\_\_\_\_  |
| ⬜ **Reviewed simulation based assessments** | Date(s) completed: \_\_\_\_\_\_\_\_\_\_\_\_Achieved? Yes ⬜ No⬜ Feedback: |
| **Facilitated feedback:** |
| **Probe learner for their reactions to and perceptions of assessment data** |  |
| **Explore learner’s understanding of the content of assessment data:**  |  |
| **Discuss quality/adequacy of** **assessment data** |  |
| **Academic Coaching:** |
| ⬜ **Discussed career plans/goals** | Electives completed/planned: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Career/elective plans: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| ⬜ **Discussed progress in research** | Research project(s) in progress: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Research concerns/issues arising: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| ⬜ **Discussed self-assessment and self-directing learning plan** | \*\* See learning plan created\*\* |
| **Areas for improvement:**  |  |
| **Areas of strength:** |  |
| **Academic Coach Summary:**  |
| **Priority area(s)/skill/competency:** |  |
| **Recommendations for CC / RPC**□ Progress is Accelerated Comments:□ Progressing as expected Comments:□ Not progressing as expected * Need more data
* Requires development of enhanced educational plan
* Other

Comments: □ Failure to progress Comments: |    |

April 12, 2018

Approved by CBME Executive March 2018

Sent to PGEC for information March 2018