

Dear Colleague

You have been selected for an in-depth performance review by your Department Head Local and the Regional Department Head. The in-depth performance review is mandated by the Fraser Health Medical Staff Rules (Article 3.8, page 33), and is to be conducted at least every three years for each department member. The program will initially focus on those members in the provisional category. You have been selected to undergo this process as you are a provisional member of the medical staff, and a performance review is required for members in the provisional category before they can be recommended to advance to the active staff.

The in-depth performance review process is designed to be a primarily learning experience for department members, and an opportunity for individuals to identify their strengths and weaknesses. The process aims to provide an objective and standard approach for receiving constructive feedback for department members, and facilitates frank and honest discussions between individuals and their Department Head Local (HDL) and/or the Regional Department Head (RDH) to identify areas for improvement. At the same time, for those members in the provisional category, the program allows for an objective assessment of their skills and competencies as a hospitalist, and can be part of the decision making process for recommending promotion to the active staff category.

Such performance review programs have been implemented in a number of organizations. For example, the Council of Academic Hospitals of Ontario (CAHO), which comprises various academic teaching centres from across the province, has implemented in-depth reviews for their physicians¹. Similarly, the College of Physicians and Surgeons of Alberta (CPSA) has been conducting mandatory reviews for primarily community-based physicians in Alberta for many years², and similar programs also exist in other provinces (e.g. British Columbia, Nova Scotia).

The in-depth performance review in our department is a multi-modal exercise that has three components:

- 1) A sample chart audit to assess the individual's diagnostic decision making skills, as laid out by the Canadian Society of Hospital Medicine in their "Core Competencies in Hospital Medicine – Care of the Medical Inpatient"³ nationally recognized document;
- 2) A multi-source feedback exercise involving **anonymous** peer reviews and a self-assessment questionnaire based on the CPSA's Physician Achievement Review questionnaires;
- 3) A structured meeting (i.e. coaching session) with the department head to review findings from above sources, as well as other relevant information (e.g. CME records, involvement in program development etc.).

This process has been developed by a working group comprised of a number of individuals from across our sites, and has been approved by all the Department Head Locals for Hospital Medicine across all sites. All department members in the provisional category are required to go through this performance review program.

As you go through this process, it is important to keep the main objective of this exercise in mind: **it is designed to help you become a better practitioner in a safe and constructive manner**. It is also important to remember that this process is completely confidential and is handled with the highest levels of discretion and confidentiality.

You are asked to:

- Complete an online **Self Evaluation Questionnaire**
- Invite at least **8 colleagues** to complete an anonymous, online **Medical Colleague Questionnaire**

Once all the evaluations are completed, you will meet with your HDL/RDH to review the results. You will meet with him/her to go over the results of the anonymous on-line evaluations, as well as any other sources of relevant information deemed appropriate by your HDL (such as CME records, attendance at committees etc.), and work collaboratively to develop a Professional Development Action Plan. You will revisit this plan over the next few years at the time of your privilege renewals.

The following pages outline the steps that you have to undertake in order to complete this process. More detailed information can be found on our Department's Performance Review Toolkit, available upon request.

If you have any questions, feel free to contact your HDL or the RDH, Dr. Vandad Yousefi at vandad.yousefi@fraserhealth.ca.

Step 1 Notification of enrolment

You will be contacted by your department head to inform you that you have been selected for this review.

Step 2 Complete the online professional practice survey and your own self-assessment survey

This part of the process will involve completing a self-assessment survey as well as gathering feedback from colleagues who work with you using the online Physicians 360 survey tool. You can click on the following link to access the Physician 360 survey program:

<http://physicians360internal/requests.aspx>

Click on the link to take you to the “Physician 360” website where you can **invite yourself** to complete a self-assessment survey as well as **invite others** to complete the survey. This process must be completed on a FH computer on which you have logged on using your FH windows login and password.

If you are not in the practice of checking your FH email you can do this by first logging onto Windows using any Fraser Health computer. Next, open Microsoft Outlook from the desktop where you will be able to check your email. The email will have “**Physicians Feedback Invitation**” as the subject. If you have not received this email already, please contact Editha Payumo at editha.payumo@fraserhealth.ca.

Once you are on the Physicians 360 website:

1. **Invite yourself** to complete a self-assessment by inputting your own email address. You will then receive an email inviting you to complete your own self-assessment. This email address does not have to be your FH email, and you can use your own personal email if you wish.
2. **Invite physicians to complete the online assessment by providing email addresses for at least 8 colleagues** (other hospitalists, specialists at your current site or other places) in the space identified. Most of these email addresses will be pre-populated in the web application. If you are unable to find an email address, you can manually enter the email address in the appropriate box or contact Editha Payumo (editha.payumo@fraserhealth.ca) to get hospitalists' personal emails. In some cases, your Department Head may ask you to specifically invite certain individuals (such as other hospitalists who work with you frequently).
3. **While we recommend a minimum of 8 people, it will be a more meaningful exercise if you invited more people (at least 10-15)** in order to get a more comprehensive set of perspectives.
4. **We recommend your Local Hospitalist Chief (Head Department Local) be invited as a medical colleague rather than as Head Department Local.** This is to ensure that their feedback is anonymous as the other responses are.

Asking 8 each of physician colleagues to complete the online survey is the recommended minimum. Asking more than 10-15 individuals to complete the survey increases the chance of receiving balanced feedback as well as comments which have been noted to be one of the most valuable parts of the

process. **Send out as many invitations as you can, receiving feedback from your colleagues is the most valuable part of this program.** Sending a personalized email to each colleague or approaching them in person and asking them to complete the survey will also increase the completion rate.

Those you invite to participate will be asked to respond before the closing date. A reminder will be sent to them 2 and 4 weeks before this date.

Please note that the online professional practice survey data and report ***can only be accessed by you.*** The results will be password protected by the individual physician (i.e. you) and stored on a non-Fraser Health server. Your Department Head or anyone else in the organization cannot access your survey information directly.

Step 3 Receiving the results of your professional practice and self-assessment online surveys

Within a few days following closing of the survey, you should expect to receive by email a link to access the completed online feedback report. If you have not received the link within this time frame, please contact Editha Payumo (editha.payumo@fraserhealth.ca). You can also follow this link to access your results from any FH computer that you have signed into using your personal Windows login by following this link

<http://physicians360internal/reports.aspx>

The results of the survey will be reported anonymously and results will only be available when a minimum of three responses are collected to ensure that the respondent cannot be identified. Responses from colleagues will be compared to the self-assessment responses.

In addition to the online evaluation surveys, your Department Head (or delegates) will conduct anonymous chart audits of a few patients you have managed. A standard tool will be used and your Department Head will share these with you ahead of your meeting with him/her.

Step 4 Start working on your Professional Development Action Plan

Once the results of self-assessment survey and professional practice surveys are available, the next step will be to reflect and complete your Professional Development Action Plan which is attached to the end of this document on pages 6-13.

Step 5 Prepare for the meeting with your Local Department Head

The last step of the program is to meet with your Department Head. Following receipt of the results of the chart audit, online surveys and completion of your Personal Development Planner, a one hour meeting with your Department Head should occur. The Department Head will not have a copy of the online surveys, so it is important that these be printed and taken to the meeting. This will give you and your Department Head an opportunity to examine and discuss the available information to better

understand your strengths and areas for improvement and work on finalizing the Professional Development Planner.

In preparation for this meeting you should bring:

- 2 copies of the results of your online self-assessment and professional practice survey
- Your completed Professional Development Planner (Action Plan)

Step 6 Meet with your Department Head

Plan to meet with your Department Head for one hour in a quiet place where you won't be disturbed by phones or requests. This is very important, as this conversation cannot occur in a busy space. Your Department Head will:

- Ask you about your understanding of the feedback you have been given from your online professional practice survey and the results of your chart audit exercise. Remember your self-evaluation is equally important as the feedback of others.
- You and your Department Head will review your Professional Development Action Plan. Your Department Head will be interested in discussing your strengths so don't forget to prepare to discuss examples of these as well.
- Do be open to the coaching that the Department Head will offer as this is about being the best you can be.

Step 7 Fill out the Sign Off Sheet and Confidentiality Agreement

At the end of your meeting with your Department, both of you will sign a Confidentiality Agreement as well as a Sign Off Sheet and Checklist for Coaching Session designed to summarize your discussion. You will need to provide a copy of your online evaluations, and your Professional Development Planner to your Local Department Head. Your local department head will keep these, and will review them with you over the next few years (e.g. At the time of your next renewal of privileges). A copy of the Sign Off Sheet and the Professional Development Planner will also be forwarded to the Regional Department Head.

Professional Development Action Plan (adapted from CAHO¹)

Purpose of this document

This document contains background information and tools to help you prepare a development plan based on the results of your in-depth performance review. The questions and guidelines are designed to help you think through your strengths and areas for development, and to identify development activities that will facilitate your professional growth and enhance the hospital's overall quality management process.

Development planning takes time and reflection

Understanding and making use of your feedback data for personal development takes time and thought. It is not expected that you will complete your development planning in one sitting. Take your time. Work with your data. Ponder your strengths and development areas. It has been found that people are more likely to develop and change when their development is linked to their personal aspirations and goals. Discuss these with your Department Head. Involve him/her in helping you to set the direction for your development.

Determining where you want to focus your development efforts requires a close examination of your strengths and development needs. Be sure to review your feedback prior to meeting with your Department Head. Since not all elements of the review may be equally relevant for you, think carefully about your priorities and directions for your development.

Begin by taking time to reflect on both your personal and professional development needs. Ask yourself:

- What does my Department Head and/or hospital need from me?
- What do I aspire to in my personal and professional life?

Your answers to these questions will help you begin to identify the professional competencies for development that will be most useful to you in both in your current situation and your future career planning.

¹ Council of Academic Hospitals of Ontario. 2009. 360-Degree Physician Performance Review Toolkit. Available from <http://caho-hospitals.com/wp-content/uploads/2014/02/CAHO-360-Degree-Physician-PerformToolkit2009.pdf>

Preparing a development plan

Included in this guide is a Professional Development Planner (page 25) to assist you in defining your development objectives and action steps. These planners are structured to include the key elements of good development planning:

- **Role and Aspirations** – When planning, take a step back and think about your professional development and aspirations. Consider the requirements of your current or future role – this may provide you with direction when thinking about your development. There is, however, more to development than just being successful in the profession. Personal growth and development involves reinventing ourselves over time. To make the best use of your development time, be sure to focus your efforts on the right things not only for your professional success, but also for your personal long-term fulfillment and happiness.
- **Goals** – Setting clear goals, is a critical step in your development process. It is essential that you choose goals that interest and energize you, and that will also be of value to you. Ensure your goals are results-oriented, challenging and measurable. Your goal priorities should:
 - Support your current and future professional development, and Link to your personal aspirations
 - Choose no more than two or three development goals for a given period. Attempting significant development on more than three areas of professional competence at once is likely to result in very limited progress for most people.
- **Obstacles** – To create a successful development plan, you need to understand what factors may make it difficult for you to demonstrate the professional competence areas you have selected for development. Gaining a better understanding of what is getting in your way will allow you to address these obstacles and increase the likelihood of successfully developing.
- **Action Steps** – Identify concrete actions that will meet development goals; these should be time-phased within a 6-12 month period.
- **Support Required** – Identify any support you may require in the preparation and implementation of your Personal Development Plan – what specific involvement and support would be helpful from your Department Head or others? These people can be quite instrumental in helping you carry out your development plan through participating in many of the action categories noted above or through approving funds and time allocation for developmental activities. Use the worksheets at the end of this document to outline the steps you feel these people could take which will provide practical support for your progress toward each development goal.
- **Time Frame** – Indicate a time frame in which you will complete each action.

Outcomes of development planning

The outcomes you can expect from a well-organized individual development plan include:

- An accurate awareness of your current professional competency levels and an appreciation of your potential; and,
- Accomplishment of specific practical steps taken day-to-day to achieve that potential.

Practical action steps

The practical action steps needed to meet your development goals should reflect a logical sequence of activities that support your learning and development in the professional competency area.

Your practical action steps will probably be drawn from one of the following categories:

- **Reading Material** – Books, articles and special publications that give you conceptual stimulation in the competency development area. Both research publications and written practical guides can be helpful.
- **Seminars and Workshops** – Intensive training sessions focused on your professional competency development needs. These should offer both conceptual learning and hands-on practice.
- **Professional Tasks and Behavioural Practice** – Tackling new professional tasks or carrying out behavioural practices, which will require the practical use of new competency-related behaviours.
- **Project Assignments** – Seeking new project assignments within the hospital, which require the competency you want to develop, for example, leading a task group. The specific role you assume should emphasize the specific competency-related behaviours you are trying to develop.
- **Mentoring and Coaching** – Observing, seeking advice, direction and feedback regarding competency development actions and progress from other physicians or non-physicians who demonstrate a high degree of proficiency in a competency area you want to develop. Seek suggestions from your Department Chief or other knowledgeable people.
- **Review and Reinforcement** – Asking others, including your Department Chief, to help monitor your development progress by observing, commenting upon, criticizing or recognizing specific efforts.
- **Team Involvement** – Pairing up with other peers or joining teams of other physicians or professionals working on tasks or projects that will help achieve your development goals.

What to do next

Begin preparing your development plan using the Professional Development Planner on the following page. Once you complete a first draft of your development plan, arrange to meet with your Department Head. The focus of this meeting should be (a) negotiation of development priorities, and (b) refinement of your planning process. Your role will be to:

- Share your development objectives and action plans
- Get reactions and input about your development needs
- Reach an agreement on development priorities and resources

Your Department Head's role will be to share with you his/her prepared analysis of your development needs and to work with you in reaching agreement on the plan. It is expected that your collaboration will be ongoing through the duration of the planning period.

Following your planning meeting with your Department Chief, it will be your responsibility to implement your development plan. Your plan will serve as the primary reference for you and your Department Head in working toward the development objectives identified. Your development plan is owned by you. It should be protected and treated confidentially by each of you.

Professional Development Planner

What are my professional goals and interests?

What is important to me professionally:

a) In the short-term?

b) In the long-term?

Based on my feedback, what are the 2-3 key development themes for me?

What are the specific areas of strength that I want to leverage?

What are the specific areas of development I need to focus on?

What ONE or TWO professional competencies do I want to improve first as part of my professional development in the next year?

a)

b)

What are potential obstacles or barriers to my development (e.g., situations, people, self, management)?

What can I do to avoid or eliminate these obstacles?

What support can I get from others for development (who, why, how, when, what)?

Goal One

ACTION STEPS	POTENTIAL OBSTACLES AND RESPONSES	SUPPORT REQUIRED FOR THIS ACTION	TARGET DATE

To help me achieve this goal, I need to involve/how:

Resources I need to achieve this goal are:

Goal Two

ACTION STEPS	POTENTIAL OBSTACLES AND RESPONSES	SUPPORT REQUIRED FOR THIS ACTION	TARGET DATE

To help me achieve this goal, I need to involve/how:

Resources I need to achieve this goal are:

