INT D 410

Interprofessional Health

Team Development Course

Facilitator Handbook

UNIVERSITY OF ALBERTA
HEALTH SCIENCES COUNCIL
Health Sciences Education and Research Commons

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Acknowledgements

Thank you to the Centre for Teaching and Learning, University of Alberta, for contributing to this Facilitator Handbook. http://www.ctl.ualberta.ca

Thank you to our INT D 410 facilitators and rovers, past and present, for contributing to the course and the content of this Facilitator Handbook.

BACKGROUND

Purpose of INT D 410

INT D 410 uses experiential learning inside and outside the classroom to teach team skills and give students practice in the interprofessional competencies of Communication, Collaboration, Role Clarification, and Reflection. This course gives students practical skills they'll need to promote interprofessional relationships and knowledge exchange between professions in health service delivery, with a view of enhancing patient care. There is a minimal amount of didactic presentation (lecture format) in INT D 410.

This course provides students with collective competence to ensure a solid foundation in: the principles of collaborative practice for their professional careers; transferable behaviours grounded in an understanding of how to engage the expertise of other health professions across settings; an understanding that collaboration is central to quality improvement, patient safety, health systems, and advocacy; and opportunities to interact with practitioners and educators from a variety of health disciplines.

Participating programs

Each year, over 1000 students across 6 faculties take INT D 410:

- Faculty of Agricultural, Life and Environmental Sciences (ALES)
    - Dietetic Internship (Diet)
    - Human Ecology (HEcol)
    - Nutrition (Nutr)
- Faculty of Medicine and Dentistry (FOMD)*
    - Medical Laboratory Sciences (MLS)
    - Medicine (Med)
    - Radiation Therapy (RadTher)
- Faculty of Nursing (Nu)
    - After Degree (AD)
    - Augustana (Aug)
    - Collaborative (Collab)
- Faculty of Pharmacy and Pharmaceutical Sciences (Pharm)
- Faculty of Kinesiology, Sport, and Recreation (KSR)
    - Kinesiology (Kin)
    - Other KSR programs

- Faculty of Rehabilitation Medicine (Rehab)
    - Occupational Therapy (OT)
    - Physical Therapy (PT)
    - Speech-Language Pathology (SLP)

*Students in Dental Hygiene and Dentistry participate in specific activities with INT D 410 students, but don't take the full INT D 410 course.

Course administration

The Health Sciences Education and Research Commons (HSERC) is part of the Health Sciences Council, a collaborative unit at the University of Alberta that includes all health sciences faculties. HSERC staff administer the INT D 410 course and develop the curriculum. We provide weekly class guides for facilitators and students to follow, along with online learning resources. The best way to reach the course admin team is at intd410@ualberta.ca.

Interprofessional competencies

The University of Alberta consulted with professional associations, other universities in Canada, and the Canadian Interprofessional Health Collaborative (CIHC) to identify four competencies that are critical to collaborative practice:

- **Communication**: Communication skills that enhance interprofessional team function.
- **Collaboration**: Interprofessional team process skills that achieve common goals.
- **Role Clarification**: Understanding of own role and the roles of others in an interprofessional context.
- **Reflection**: Critical evaluation of professional and team practice in an interprofessional context.

The Competency Framework is foundational to how the University of Alberta approaches interprofessional education (IPE). See more at: http://uab.ca/ipe

History of INT D 410

INT D 410 was developed over 20 years ago in response to growing calls for interprofessional teamwork in the health workplace. With the increasing financial and human resource strain on the health care system today, this call is even more pertinent. Healthcare settings require graduates who are workforce-ready, and equipped with the knowledge, skills, and attitudes needed to meet complex patient needs, changing practice environments, ever-evolving practice technologies, and increased professional specialization. In addition, these practitioners must provide integrated and patient/client, family, and community-centered care. Professional licensing bodies, standards of practice and academic accreditation standards require that students and practitioners develop interprofessional team skills in order to practice.

Scholarship in interprofessional education suggests that students develop the interprofessional team skills required by "learning from, with, and about each other" with the goal of improving patient care (Center for the Advancement of Interprofessional Education, 2002). INT D 410 offers an opportunity for this type of learning to take place early in students' academic programs, in order to create a foundation that can be built on through their academic and professional careers.

In 2000, INT D 410 was awarded the Alan Blizzard Award to recognize collaboration in university teaching and learning. This award is sponsored by the Society for Teaching and Learning in Higher Education (STLHE). The award-winning paper is published at https://www.stlhe.ca/wp-content/uploads/2011/09/UofA-Blizzard-Paper-2000.pdf.

Key Articles

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Bainbridge, L., Regehr, G. (2015). Should there be an "I" in team? A new perspective on developing and maintaining collaborative networks in health professional care. In C. Orchard & L. Bainbridge (Eds.). *Interprofessional client-centred collaborative practice: What does it look like? How can it be achieved?* Nova Science Publishers: New York, NY. Chapter 4, pp 51-66. Retrieved from ResearchGate website: https://www.researchgate.net/publication/291822066

Maxfield, D., Grenny, J., McMillan, R., Patterson, K., & Switzler, A. (2005). *Silence kills: The seven crucial conversations in healthcare*. Retrieved from American Association of Critical-Care Nurses (AACN): http://www.aacn.org/WD/Practice/Docs/PublicPolicy/SilenceKills.pdf

Rudolph, J.W., Simon, R., Dufresne, R.L., & Raemer, D.B. (2006). There's no such thing as "nonjudgmental" debriefing: A theory and method for debriefing with good judgment. *Simulation in Healthcare 1*(1), 49-55. Retrieved from http://journals.lww.com/simulationinhealthcare/Fulltext/2006/00110/There_s_No_Such_Thing_as__Nonjudgmental_.6.aspx

Rudolph, J.W., Simon, R., Rivard, P., Dufresne, R.L., & Raemer, D.B. (2007). Debriefing with good judgment: Combining rigorous feedback with genuine inquiry. *Anesthesiology clinics 25*(2), 361-376. doi:10.1016/j.anclin.2007.03.007

Saher, M. N. (2017). *Better healthcare for Albertans: A report by the Office of the Auditor General of Alberta*. Retrieved from Auditor General of Alberta website: http://www.oag.ab.ca/node/602

World Health Organization, Department of Human Resources for Health, Health Professions Networks Nursing and Midwifery Office. (2010). *Framework for action on interprofessional education and collaborative practice* (WHO Publication No. WHO/HRH/HPN/10.3). Retrieved from World Health Organization website: http://www.who.int/hrh/resources/framework_action/en/

Being a Facilitator

In interprofessional education (IPE), a skilled facilitator is neither team member nor detached observer. Instead the facilitator:

- Moves with ebb and flow of student interactions, surfacing as needed to shed light on group dynamics,
- Draws out new understandings,
- Encourages reflection,
- Gently shapes the movement of the interprofessional team, and
- Nurtures the creation of shared meaning among team members.

Adapted from: LeGros, Amerongen, Cooley, & Schloss, 2015, p. 596.

Facilitator Role & Responsibilities

At least two facilitators oversee each section of INT D 410. Facilitators model constructive team behavior as they work together to guide student teams through the activities within the course and to illuminate the processes taking place. Facilitators are not expected to provide the answers, as decisions and outcomes are up to the teams. However, facilitators do assist teams when they are off track or are having difficulties. They provide the background information and introduction to each class, guide student teams through learning activities, initiate large group discussion, evaluate activities learned in the small group, and identify and assist in resolving problems. The facilitator's main role is to enhance students' learning in a supportive and positive manner.

What do facilitators do?

- Model effective team behaviour.
- Support analysis and development of how to work together effectively.
- Guide and support team process through learning activities.
- Encourage students to seek information from a variety of sources.
- Promote critical thinking, problem solving, and reflection.
- Provide feedback to teams about process.
- Participate in the evaluation process.

What makes a good facilitator?

- Wants to be there.
- Stimulates interaction.
- Is not threatening.
- Does not lecture.
- Supports the goals of small group learning.
- Directs attention to team objectives.
- Uses cases to expand understanding of concepts and relevance to future practice.
- Ensures students leave wrap-up discussions with a clear "so what" message.

Facilitators direct attention to critical thinking and how a task is completed rather than focus on the task itself ("it's about the journey, not the destination"). The small group sessions that you facilitate can be full of surprises and may seem disorganized, even chaotic at times. Much of the resulting "messiness" turns out to be necessary and desirable. Even with the most skillful leader, small groups seldom progress neatly from one topic to another, in a scripted lecture style. In fact, they shouldn't.

Facilitation is a process and there's no "one right way" to be a good facilitator!

Classroom activities

1. Set the stage (pre-brief)	*2. Carry out the activity*	*3. Debrief the activity*
• Review the objectives of the activity. • Review the events or activities to take place. • Review the expectations of learners.	• Observe team interactions. • Ask questions to prompt teams to think deeply about their process. • Offer periodic feedback and clarify the expectations as needed.	• Ask questions and invite reflection. • Be creative, energetic, and enthusiastic. • Focus on the objectives of the activity.

Debriefing

Remember the purpose of the debrief is to clarify or reflect on the process, reinforce the learning that has occurred, and link that learning to future practice.

Sample debrief questions (adapted from Rose, 1999):

- How did that feedback make you feel?
- What went on?
- Do you agree/disagree that is what occurred, or why it occurred?
- What did you learn from this experience and how can this be used in your practice setting?

Giving feedback

- Let students know what they are doing well and what needs to be improved.
- Make feedback clear and relevant, and use concrete examples.
- Give notes on both individual and team progress.
- Use a rubric, if provided.
- Give both formal and informal feedback.
- Offer informal feedback at least once per class as you circulate.
- Provide formal written feedback with grades at least twice a term.

Grading and evaluation

Levelling

Typically, the facilitators within each course section will split up the grading responsibilities. For the first assignment, all the facilitators in that section should grade several assignments together, and compare the marks they gave. If the marks are significantly different, they should consult the course administrators or rovers for direction in adjusting the grades for consistency within and across sections.

Grading

Review the course outline for a breakdown of course grades and grading scales. Facilitators grade each assignment and recommend a final grade. The course is CREDIT or NO-CREDIT (Pass/Fail) with a minimum of 70% achieved by the student to achieve a CREDIT.

Co-facilitation Models & Expectations

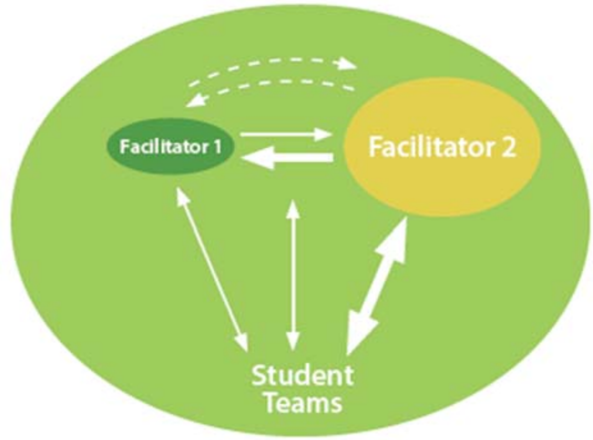
Typically, two or three facilitators lead each section of INT D 410. The next page shows some possible arrangements for a team of co-facilitators working together to guide a cohort of students. When there are more than two facilitators the models can be adapted but the same dynamics are at work.

Your mode of co-facilitation is not static; you might use a combination of these models over time. When choosing a model to follow, consider how your facilitation team will do the following:

- Role model your teamwork and processes for the students.
- Balance your strengths.
- Share the work.
- Monitor your team process.

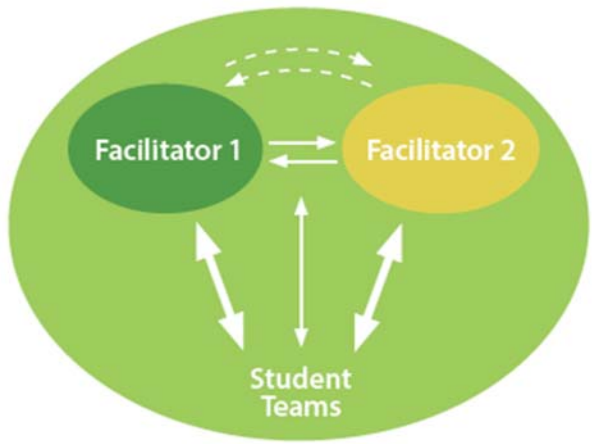
At about three or four weeks into the course, co-facilitators should sit down and debrief together. How is your teamwork working right now? How is the term going? What disagreements do we have, and how can we resolve them? Working through these questions together can improve your effectiveness as facilitators.

A course section may have one experienced facilitator along with two newcomers. You might start the term with the **Mentorship** model where the experienced facilitator **leads the group**, explains concepts, demonstrates various facilitator skills, suggests tasks for the others, etc.



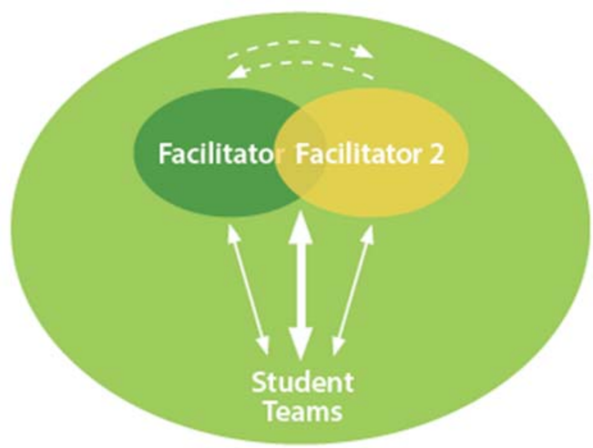
(A) Mentorship Model

As the term progresses, there may be activities such as marking that are done under the **Coordination** model to **divide up the work** (each facilitator grades certain student teams); the facilitators continue communicating with each other to ensure they are marking consistently and they all have an equal voice in decision-making.



(B) Coordination Model

In other situations, a **Collaboration** model may be ideal, with more overlap among facilitators as to which students they work with, e.g., when student teams are demonstrating skills during a patient conference or during the TOSCE, all facilitators are observing and giving feedback **as a group** to each student team. There is value in all facilitators seeing all students so the students receive more diverse feedback.



(C) Collaborative Model

Co-Facilitator Expectations Worksheet

Get together with your facilitation partner(s) and write down …

- Which co-facilitation model will you start with?
- What other models will you use over time?
- What would success look like?
- What do you hope to gain from this experience?
- How will workload be divided?
- How and when will you meet?
- What communication methods work best?
- What are your facilitation or teaching styles?
- How might they be complementary or conflict?
- How and when will you evaluate your team process?
- How and when will you give each other feedback?

Communication Skills for Facilitators

Effective communication in a team involves listening, speaking, and group management skills. Here are some things to keep in mind when communicating with students, co-facilitators, or others in your professional practice.

Attend to others and use active listening

- Suspend your own concerns or opinions; notice when they intrude.
- Put yourself in the other person's place and try to consider their frame of reference.
- Show appropriate verbal (acknowledging) and non-verbal cues (encouraging).
- Listen for content and emotion, and seek clarification if you need it.
- Summarize or paraphrase to check your understanding. A good paraphrase should: be concise, focus on the other person's experience, and reiterate both facts and feelings.
- Aim to understand others' messages. Recognize that you do not have to agree with these messages but should try your best to understand them.

Speak

- Be clear, concise, and sincere.
- Try to avoid over- or understating the intensity of a particular situation.
- When dealing with emotionally charged discussions, use "I..." statements, e.g., "I hear that..." or "I feel that..."
- Be cognizant of time and recognize when you should let someone else speak.
- Ask effective questions. Clarify information, understanding, and feelings using "what" or "how" questions (avoid "why" questions as they may lead to defensiveness).

Encourage dialogue and idea generation

- Set aside silent time to allow each member to formulate their own ideas before group brainstorming. This strategy makes it clear that each person has a responsibility to contribute.
- Ask for input from all members of the team, even if an early idea brings immediate agreement.
- Give constructive feedback and celebrate the successes of individuals and the group.

Keep the group focused

- Determine the main issue and smaller issues. Prioritize as required.
- Acknowledge that there may be multiple solutions to any problem. Help reach consensus by asking the team: "What would the best solution look like?"
- Remind teams to commit to action. Identify who is responsible for the next step and set a timeline for when it will be taken.
- Recognize when productivity is waning or if conversation is becoming emotionally charged or off topic. Use a timeout to give the team a break or refocus, if required.
- Summarize key ideas or decisions to move meetings forward or when bringing them to a close.

Observe the group and reflect on the group process

- Ask yourself (or the group) questions that can help you better understand your process and how you could improve your communication as a team.
- Sample questions: Are all members participating? Is there conflict? How is it being managed? Are goals and roles clear? Are problems solved effectively and in a timely fashion?

One-Minute Feedback Exercise

Midway through the course (about class 4 or 5) is often a good time to ask the students for feedback on your co-facilitation. The One-Minute Feedback Exercise (or any variation of it) is a great way to informally and quickly receive feedback on what is working in the class, and what can be improved upon. Reading through the comments and acting upon some of the feedback lets students know that their facilitators are working hard to create a collaborative classroom.

1. Write the following three statements on the board:

STOP doing…	*START doing…*	*KEEP doing…*

2. Explain the exercise to students. This exercise is designed to help you improve your facilitation skills, so all feedback should be:
   - **Brief** because you'll have a lot of them to read.
   - **Focused** on things that you have power over (i.e., not about the curriculum).
   - **Constructive**, and formatted using the CORBS model.

   Any curriculum-based feedback can be sent directly to the course coordinator, or provided on the student evaluations in class 10.

3. Each student takes out a blank scrap of paper and completes each of the three statements that you wrote on the board.

4. Collect and review the feedback. Decide what you can change and what you can't. Some feedback will be useful, some will not be.

5. In the next class, summarize what you learned from the feedback and what you are unable to act on. Model effective reflective practice by stating how you plan to use the feedback to inform your future facilitation practice, within INT D 410 and/or outside of it.

6. Consider providing feedback to the students in the same format (stop, start, keep doing).

Facilitation Skills Competency Assessment

This is an optional activity. The following is a list of skills that are important in becoming a "facilitative leader" and will help you to set personal goals for your learning.

STEP 1: Read over the items listed under each category (A, B, C, and D) carefully.

STEP 2: Reflect on your facilitation experiences to date. Try to assess whether you need to learn more, are OK, or are highly skilled in each of these areas.

STEP 3: Although all of the skills are necessary, there are probably some which you have already acquired, or which do not seem personally relevant to you. Go over the list again, and think about the skills which are most important to you at this time. Choose the one category (A, B, C, or D) in which you think you are particularly strong in your facilitation style, and one category in which you think you need improvement.

STEP 4: Put an X in the category corresponding to your greatest strength and a question mark (?) in the category which most needs improvement.

Strength (X)		*Needs Improvement (?)*	
A. General leadership skills		A. General leadership skills	
B. Group skills		B. Group skills	
C. Interpersonal skills		C. Interpersonal skills	
D. General competencies for adult educators		D. General competencies for adult educators	

Adapted from the University of Toronto's Office of Interprofessional Education, Copyright 2006.

A. *General leadership skills*	Need increased knowledge	Have knowledge but need practice	Competent	Can teach & help others learn
1. Helping a group or individual assess needs and interests.				
2. Helping a group or individual define short and long-term goals; contracting for expectations.				
3. Helping the group to develop as a team ("team-building").				
4. Helping the group to balance completing the task by periodically examining how it is functioning.				
5. Guiding group discussion: keeping the group 'on track'.				
6. Helping the group solve problems systematically.				
7. Helping the group make decisions which get implemented.				
8. Managing communication and conflict among group members.				
9. Helping group members to access needed resources.				
10. Being able to recognize and respond to non-verbal cues.				
11. Recognizing and appreciating member differences; helping members do that for each other.				
12. Developing and maintaining a positive working climate.				
13. Being willing to delegate when appropriate.				
14. Helping group members to become self-sufficient and independent of you.				
15. Helping others understand your role as a "facilitative" leader.				

B. Group skills	Need increased knowledge	Have knowledge but need practice	Competent	Can teach & help others learn
16. Offering own ideas and opinions.				
17. Asking for others' ideas and opinions.				
18. Summarizing group discussions.				
19. Testing feasibility of decisions reached.				
20. Helping others to participate; supporting or encouraging others.				
21. Building on others' ideas.				
22. Offering your own resources and skills to the group.				
23. Helping a group plan for action, in a way that enables everyone to be clear about expectations.				

C. Interpersonal skills	Need increased knowledge	Have knowledge but need practice	Competent	Can teach & help others learn
24. Taking risks-experimenting with new ways of behaving.				
25. Providing information about yourself (feelings, thoughts, etc.).				
26. Giving others non-judgmental, descriptive, well-timed feedback (information on their behaviour)				
27. Asking for information about your behaviour.				
28. Receiving feedback from others non-defensively.				
29. Using feedback which seems appropriate to make changes in your behaviour.				
30. Being self-reflective (recognizing what you did, and what impact it had on others).				
31. Listening actively to others (being able to reflect back your understanding of what you hear others say).				

32. Identifying your assumptions and checking them against reality.				
33. Being congruent in your messages to others.				
34. Accepting the value of others' experiences, perceptions, etc., without necessarily agreeing with them.				
35. Making "I" statements – not generalizing (speaking for yourself).				

D. General competencies for adult educators	Need increased knowledge	Have knowledge but need practice	Competent	Can teach & help others learn
36. Establishing a physical and emotional "climate" conducive to learning.				
37. Assessing learning needs.				
38. Identifying educational objectives which are relevant to the learner's needs.				
39. Designing learning activities which respond to both the objectives of the learner and the trainer.				
40. Using a variety of methods and approaches to appeal to individual learning styles and a range of experience.				
41. Providing or making accessible on-going feedback to the learner.				
42. Helping learners assess their own progress towards goals and outcomes.				
43. Helping learners use their own and each other's resources, skills and experience.				
44. Helping learners develop a positive self-concept and maintain their self-esteem.				
45. Confronting and dealing with non-productive group behaviour.				
46. Reducing unnecessary anxiety.				

Classroom Management

Role Modeling Effective Team Behaviours

A key outcome of INT D 410 is students who become effective team members within a professional setting. For this reason it is particularly important that all facilitators model effective and professional team behaviors. Here are a few suggestions:

Model transparency

Being transparent is important as a team member but also as a facilitator. Be open regarding your facilitation style, such as why you take a particular approach. Work with your co-facilitator to model reflective teamwork, and describe this process to students. This will help students to see effective collaboration. For example, you could discuss the questions you ask yourself when working as part of a team: "Does my co-facilitator feel that I am contributing enough?" "Am I communicating well with my teammates?"

Also, if both facilitators agree to do so, you could discuss problems that may have arisen in your teamwork and how you dealt with those problems. Possible examples include: "Because my co-facilitator likes to call directly, I need to be clear that I prefer to be contacted by email rather than by phone." "I know you're the more experienced facilitator, but I want us to take turns introducing the sessions." "When I return the marking to my teams at an agreed-upon time, and your teams are still waiting, I feel it reflects badly on both of us."

Create an open environment where all questions are welcome

Acronyms, discipline-specific knowledge, and jargon can be a barrier to collaboration. Ask students to clarify or to explain things that may be obvious within their specific background, but that you or other students might not know about. Clarify your own acronyms and jargon. Above all, accept all questions in a respectful manner and expect your students to do the same.

Ask students for feedback

Demonstrate to students that all individuals, regardless of the role they play, can contribute to the team. Ask for feedback that follows a simplified CORBS format so that it is clear, owned, respectful, and specific. Model acceptance of differing perspectives and clearly communicate feedback to students as well. You may find the One-Minute Feedback Exercise in this handbook helpful in gathering feedback.

Admit mistakes and use them as a learning opportunity

No team or individual is ever perfect and there may be times when your facilitation team encounters obstacles to their teamwork or accidentally models negative behaviours. Reflect on and discuss these instances with students and demonstrate how you can move forward and learn from mistakes.

Be attentive to stereotypes

Reflect on your own stereotypes and ask students to do the same. Perhaps you or your students hold beliefs that those working in a particular profession are “arrogant” or “slackers,” or that one group of professionals may be “smarter” or “higher status” than others, or should always “be the leader.” These stereotypes, whether positive or negative, damage professional relationships. Highlight to students that making these types of judgments is unprofessional and focus instead on building positive, open, and collaborative relationships with the individuals that make up your team.

Managing the Learning Environment

As a facilitator, one of your key roles is to ensure that the learning environment is collaborative, respectful, and conducive to student learning. Here, we have compiled some tips to help you effectively organize and manage the learning environment.

Initial organization

- Prior to the first class, think through and write down your expectations for students.
- Discuss these expectations with your co-facilitator, also discuss your roles.
- In the first session, outline your expectations for students and allow time for questions.
- Ask students in the section how they would like you to attract their attention during class when you have an announcement to make. Negotiate a method that is effective and respectful.
- Be respectful of all disciplines and model this for your students. Highlight the importance of respectful communication, collaboration and participation of all team members throughout the course.
- Initiate an activity (such as an icebreaker) to help students get to know one another.

Physical environment

- Organize the room to allow teams to effectively listen and engage in dialogue. Team members should be grouped tightly together but separated from other teams.
- Encourage students to work in the room rather than move to a separate location. If noise becomes an issue, use moving to an alternate location as a last resort and negotiate your expectations with students before you allow them to leave the room.
- While teams work at different rates, encourage students to take advantage of their time together and not leave early (unless they've negotiated this with you). If students finish early, play the role of the respectful skeptic: ask students follow up questions or to explain the implications of their decisions.

Ongoing management

- Prior to each class, come up with guiding questions to facilitate discussion.
- Work collaboratively and maintain open communication with your co-facilitator.
- Ask for student input on when they would like to take breaks during each class – this will help students maintain focus and energy.
- Move around the room and listen to / check in with teams as they work, rather than lecture from the front of the room. This course emphasizes process learning, where students learn from one another. (Though from time to time, you may need to explain concepts and share experiences).
- Encourage teams to collaborate rather than compete; every team member should participate.
- Be flexible: Acknowledge that some activities may take more or less time than you planned. You may need to ask more questions to extend a student discussion or cut an activity short if you are running out of time. If something doesn't work, make note of it and try a different approach.
- Use the Facilitation Skills Competency Assessment Form to evaluate team behaviours and document any concerns. Discuss concerns with students as soon as possible.
- As you begin to settle in to your facilitation role, relax and have fun! This sets the students at ease.

Student feedback

- Ensure your facilitation style supports students' needs. Ask students, "How can we most effectively facilitate your team?"
- Get student feedback during each class.
- For example, ask, "How is this class going?" This can provide you with valuable feedback and helps you build a positive relationship with your students.
- Get written feedback from students midway through the course. Make it clear that you want clear feedback on factors within your power to change. Use the One-Minute Feedback Exercise as a means for quick feedback.
- Demonstrate to students that you read their feedback and are open to their suggestions. Make changes to your facilitation style or other factors according to student preferences, when possible.
- In addition, make sure you read student assignments and can provide them with feedback on their work.

Facilitating Deep Learning

Use the following strategies to help foster deep learning in your classroom.

Ask good questions

We can better prepare ourselves to undertake learning activities when we're clear about what we need to learn and why. We may also look for relationships and connections in what we're learning. Facilitators and students alike should ask open-ended questions such as:

- Why do we want or need to learn this?
- What do we already know? What more do we need to know?
- What resources (people, articles, etc.) are available?
- How can we break this topic down into manageable segments?

Use analogy

Comparing an unfamiliar topic to something the learners are already familiar with helps learners create a mental picture or framework to understand the new information. When presenting a new topic, use an analogy or comparison to help learners connect what they already know to what they are learning. A simple example is to describe white blood cells as the soldiers of the immune system.

Create concept maps or tables

Presenting information in flow charts, tables, and diagrams helps learners to visualize how various topics relate to each other. These tools also help us understand the big picture and to drill down into the fine detail. For example, the University of Alberta Interprofessional Competency diagram shows the four core competencies and how they're centred on the principle of patient-centred care.

Make use of teams as peer-tutoring groups

Students benefit from peer-tutoring groups in several ways: they learn collaboratively, take ownership of their learning experience, support each other, share learning strategies, and develop interpersonal skills. In INT D 410, students are already placed in teams; facilitators might encourage them to make use of those teams for peer tutoring throughout this course and beyond.

Foster critical thinking skills

Critical thinking includes cognitive skills such as discrimination, analysis, prediction, and logical reasoning. It also includes affective dispositions such as intellectual integrity, open-mindedness, flexibility, and inquisitiveness.

To foster critical thinking in learners, encourage them to analyse their knowledge, seek to understand the context for the information they receive, and reflect on what they learn. Critical thinking skills build learners' ability to reflect on team behaviour and improve future practice.

Use a range of learning resources

Drawing on a wide range of learning resources allows for comparing and contrasting different information. Rather than memorizing, learning is based on synthesis. Facilitators can help students to locate resources. Consider resources such as online videos, academic journals, newspaper articles, textbooks, web sites, museum exhibits, site visits, and guest speakers. And don't forget the resources in the INT D 410 eClass sites, including weekly course outlines, presentation slides, videos, and supplemental resources.

Adapted from: Azer, S.A., Guerrero, A.P., & Walsh, A. (2013). Enhancing learning approaches: Practical tips for students and teachers. Medical Teacher, 35(6), 433-443. doi: 10.3109/0142159X.2013.775413

Linking the Classroom to Real Life

A major focus of this course is to help students develop skills and competencies that are relevant to their future professional practice. Here are some tips to help students make these connections:

- Ask students how they think these concepts could apply to scenarios or their future practice. This encourages students to make their own connections to the content and feel more engaged with the course.

- Encourage students to come to their own answers (as they would in their professional practice) rather than providing them. Ask guiding questions when necessary.

- Encourage teams to share their insights with the whole class, if they feel comfortable. The struggles or successes of particular teams further highlight different approaches and ways of solving problems in a professional scenario.

- Bring in examples from your own work experience. Describe the impact on your team and on patients or clients.

- Use examples from movies or TV shows.

- Role play with co-facilitators. For example, you could role play giving and receiving feedback with a co-facilitator and ask students to determine if the feedback was presented effectively using CORBS.

Classroom Tips

Jargon and acronyms

As a facilitator of an interprofessional course, be very aware of jargon and acronyms. Try to be conscious of the jargon floating around the room: Who might not understand a particular term? Who might have a different understanding or definition for it?

Sometimes we use terms without thinking so invite students to call on you to explain any terms they don't understand. Explain the term in clear, simple language, in a respectful tone of voice. Similarly, you can role model effective clarification by asking students or your co-facilitator to explain what they mean when they use certain terms.

Clinical settings

Most students enjoy discussing examples from clinical settings, and sharing your experiences is a good way to engage students. However, be mindful that some students have extensive clinical experience while some have never been in a clinical setting at all. Also, some professions don't work in certain settings, which can make some students feel like your examples don't apply to them. If you find that the conversation is focused on specific clinical settings, ask students to provide parallel examples in other settings, or from their own experiences.

Embracing diversity

We often talk about tolerating diversity, but in interprofessional education, we embrace diversity. *Tolerating* diversity means not interfering with other professions, but *embracing* diversity means seeking expertise and advice, and collaborating openly.

The same holds true with a diversity of cultures, ages, or experiences. For example, new practitioners offer a fresh look at issues and problems, while experienced practitioners have a wealth of experience to offer. Both are incredibly important, and the two perspectives are better together.

TEAM DEVELOPMENT

Observation of Teams

A large part of your role as facilitator is observing the teams and providing them with feedback. Here are some tips to help you effectively observe teams.

Be present but not disruptive

- It is difficult to observe a team properly if you are across the room from them. Sit in with a team for a length of time to get a good sense of their functioning (avoid hovering). Ask students to keep an extra chair available while doing group work, to allow you to slip in and out. Offer feedback if needed.

Have the students leave an empty chair for you at their tables.

- Try to be unobtrusive when you move in or out of observing a team. Sit for 2-3 minutes or longer without interrupting or commenting. If you have a question or comment, try to wait for a natural break to bring it forward. Questions, rather than comments based on assumptions, are often the most effective strategy, e.g., “Help me understand what just happened here.”

- Ensure you move to all the teams and have a good sense of how they are functioning. At the mid-way point or end of each class, look through the competencies, think about each team's progress, and make some notes. Identify if there are teams you need to spend more time with in order to get a better sense of their progress.

Identify successes

- Point out things that teams have done well and describe how/why they worked well. For example: "I noticed your team made excellent use of paraphrasing – it seemed that everyone was listening actively and understood one another's points."
- Identify expertise. Make students aware of their skills. Some students or teams may not recognize all the skills they use. Once they become aware of their behaviours, students are able to learn from them.
- Ask students to reflect on and identify their own areas of success, either individually or as a group.

Highlight areas for improvement

- You don't need to identify every area requiring improvement, but you should address unhelpful behaviours that occur frequently or for long periods of time, e.g., sidebar conversations, ignoring the quiet person, interrupting.
- If a team goes off track or doesn't complete their task, help them refocus on their objectives. Ask targeted questions, e.g., Why is this topic or skill important? What needs to be completed?

Help students reflect

- If a team is stuck, ask them to reflect on why they think that is rather than telling them your opinion. Students who reflect and identify their own problems are on their way to becoming effective, independent managers of future teams. If needed, follow up with further questions to help them determine what they need to do to move forward.
- Help teams appreciate that differences of opinion, ideas, and skills among team members are natural and healthy. Teams can build on each other's strengths to make good decisions. Being able to invite and deal with disagreement is helpful to overall team functioning.

Facilitating Team Development

As student groups move through different phases of team development, the role of the facilitator also changes. This chart provides suggestions on how you can support teams as they move through these phases. Bear in mind that these are competent, adult learners, some of whom will require little guidance.

Phase of Group	Role of Facilitator
1. Forming Team members are becoming oriented with one another and developing commitment to the group. Acceptance and inclusion are important.	**Directing and Convening** Help the groups come together by creating a positive learning atmosphere. Clarify roles and expectations. Plan ahead and provide structure as needed.
2. Storming Team members may be in conflict or confronting issues such as dependency on the leader.	**Coaching** Help the group identify power or control issues. Facilitate communication and invite input. Expect and accept that tension is a normal part of teamwork.
3. Norming Team members are resolving conflict and establishing group agreement.	**Supporting: Conflict Resolution** Listen to the team and offer your own resources or ideas when required. Be available for consultation. Reinforce positive teamwork.
4. Performing Team members are working productively toward their shared goals. Teams have open communication, trust, and respect. Conflicts are being dealt with.	**Supporting: Effective Group Work** Encourage the team to keep focused and functioning effectively. Use questions to encourage self-reflection in the team as they summarize and synthesize their progress.
5. Adjourning Work is terminating and team members are saying goodbye. Teams may experience tension.	**Separation and Evaluation** Support teams in terminating their work and separating. Invite teams to evaluate their process and learn from the experience.

Addressing Concerns about Team Roles

While facilitating, you may find students who feel that the use of team roles (Initiator, Advocate, Energizer/Encourager, Recorder, etc.) is contrived and does not reflect reality. Students often ask, "Why can't I perform my natural role?" It is your responsibility as a facilitator to emphasize why the roles are used in the class, i.e., so that each student knows what tasks are performed by a well-functioning team, and each student has the ability to fulfil any role on future teams. Below are some strategies to highlight the importance of the roles and help students work within them.

- Acknowledge that the roles are not a true reflection of what occurs in practice. People do not behave according to place cards with typed-out roles at meetings. However, experiencing and understanding these roles strengthens learning about team process.
- Highlight that, at some point in their careers, students will be placed in a situation where they cannot play their preferred natural roles. This class offers a safe environment to work on skills that do not come naturally, but will be essential later in practice. (Use personal examples of fulfilling a role in which you were not comfortable, if you have some.)
- Encourage the team to persist and reassure them that it will begin to feel more natural with practice. Remind teams to rotate responsibility for each of the roles throughout the term.
- If students aren't using the roles, or are using them ineffectively, this is a time to give feedback. Observe the team functioning. Is everyone contributing? Are decisions made too quickly? For example, approach the team and say, "I notice your team is coming to decisions after very little input. I wasn't clear from observing your team who was the Advocate. Have you been able to provide different points of view?"
- If necessary, provide feedback to the team or individual after class about the use of roles. Show respect by listening to and acknowledging their concerns.
- Ask students to consider what might happen in a real-world situation if one of the roles wasn't being filled. For example: What would happen if there were multiple members with strong leadership skills, but nobody prepared to take notes? Would a lack of an Advocate result in making decisions before all possibilities have been explored? What could cause a team to be rigid or too task oriented?

Addressing Negative Roles in Teams

In working with a team during your own professional practice, or when observing students, you may come across some individuals that take on a negative role within a team environment. Here are brief descriptions of some of these roles, and strategies you can use when you encounter them.

Clowns

Description: They may know the purpose of the group but don't take it seriously. Clowns want to entertain. Sometimes the role is a defense against anxiety or an attempt to conceal an absence of social ease.

Strategy: Acknowledge that humour can be useful to defuse tension in the group but may not be appropriate at all times. Value their contribution when possible and then ask their opinion, disregarding any joke response.

Conflict initiator

Description: The individual is frequently trying to incite conflict within the group. Constant conflict may indicate a search for status or may reflect unhappiness with how the group is functioning.

Strategy: Disagreements should be summarized and the meaning behind them explored so that members can agree on tasks and processes used by the group. Communicate with the conflict initiator directly (perhaps without the group present) to get a sense of their overall feelings and draw out any concerns.

Defeatists

Description: They may feel that the problem is insurmountable and that there's no solution. They are often angry and express their feelings by sabotaging any progress.

Strategy: Either use active listening or treat the defeatism as a legitimate option. Whenever the defeatist says, "That won't work," reply sincerely with, "Thank you. We'll note that your opinion is that it won't work and that we shouldn't try it." Treat defeatism as a consistent "no" vote, and move on to more positive contributions.

Dominators

Description: They attempt to take over the decision making or conversation to the exclusion of others. They want to run things more than they want to solve problems.

Strategy: Elicit their opinion using active listening, then ask the rest of the group to offer opinions. Do they agree? Who in the group most/least agrees with this member?

Scapegoats

Description: A scapegoat is a member who is isolated, attacked, or accorded low status. The group projects any feelings or views it finds unacceptable onto this person.

Strategy: Seek to understand what kind of scapegoating is taking place, since this will indicate what action is appropriate. Why is the role needed by the group? What, if anything, does the individual get out of the role? Think of how to include the scapegoat in the group, perhaps by giving them a role acceptable to other members. Reinforce the positive traits and contributions of the scapegoated member.

Silent members

Description: They contribute very little or not at all to the group.

Strategy: Silence may reveal uncertainty about direction; the individual may be unsure of how to build up trust or how much to reveal of themselves. Draw out silent team members by practicing active listening and encouraging them to state their position.

Stars

Description: On stage all the time. They think highly of their own ideas, and constantly seek attention. They may believe it is more important for them to shine than for the group to succeed.

Strategy: Give these members something to do that is high profile but encourages others to participate, such as writing suggestions on the board. Insisting on parliamentary procedures may also work.

Storytellers

Description: They frequently lapse into asides or chitchat, or get caught up sharing more detail than is required.

Strategy: Interrupt their stories to tell them the purpose of the meeting. Ask them how they can further the group's purpose. If they still continue storytelling, cut short their stories, and explain how you need to move forward with the group process.

Deciding How to Decide

There are four general approaches to making a team decision. All approaches can lead to a decision; the key is to match the right approach to the right situation.

Majority rules

- **Best used for: Quick, non-critical decisions.**
- Voting, while seen as democratic and fair, may not produce good results.
- Easier to vote then work out difficult issues.
- Expertise is discounted if everyone has equal say.
- Vote can split team into winners vs. losers.
- Seldom a good approach for important decisions.

Authority rules

- **Best used for: Decisions where all the options seem to have equal weight.**
- Group defers decision to an authority (in or outside the group).
- Quick and painless decisions.
- Authority may not be expert.
- May end up making poor decision.
- Could be used when two possible decisions are equal in weight.
- Works well if group lacks expertise and real expert is available to assist.

Delegated decision

- **Best used for: Less important decisions.**
- Gives responsibly to a subset of the group.
- Can be an individual or a sub-team.
- All must agree to the decisions arrived at by those delegated with decision-making task.
- Appropriate when many decisions have to be made within a limited timeframe.
- Avoid "dumping" a decision on to others.

Consensus decision

- **Best used for: Important decisions.**
- Everyone in the group can and will support the decision.
- May not mean 100% agreement but all group members can live with the final decision.
- Promotes hard thinking.
- Can be slow and painful.
- Requires group energy so group must agree decision is worth the effort.
- Most time consuming but most rewarding.

A word of caution

Groups can fall into a habit of groupthink (a negative strategy) if they make decisions by agreeing too quickly. This can lead to inferior decisions by discouraging questions and creativity. Pros and cons are never carefully examined and weaknesses in a decision are glossed over.

Reaching a consensus

With all the differing opinions of individual members, it can sometimes be difficult to reach a consensus within a group. Remember that consensus means that all members agree to support the group action even though they may not entirely agree with it. Consensus is not a majority vote. Here are some tips to help groups reach consensus:

- Specifically define the action or decision through discussion. Lay out clearly what exactly will be done and when.
- Agree that this situation requires a consensus be reached within the group.
- Review and consider all possible alternative points of view.
- Ensure that individual members consider whether they can support this action within the group and outside of it (i.e. when speaking to others outside the team).
- Place a reasonable time limit on the discussion. If it appears that consensus cannot be reached, consider: Are there any alternative solutions that have been missed? Are there any sources of information that might better inform or influence this decision?

Conflict Management

Conflict can arise from value differences. “When individual team members hold different values or hold the same value but disagree about how the value should be operationalized, the conflict can become acutely personal and emotional, and thus difficult to resolve” (Mariano, 1989).

Step 1: Specify your concerns

- Possible question: “I’m a bit concerned about ___. Do you feel this is a problem as well? What concerns do you have?”
- Be very specific in defining the conflict.

Step 2: Clarify differences

- Possible question: “Where do we disagree?”
- Areas of disagreement must be identified so that they can be dealt with as separate issues or problems to be resolved.
- Acknowledge emotion but appeal to reason.

Step 3: Agree on commonalities

- Possible question: “As we discuss the issue, where can we agree?”
- Identifying areas of agreement helps establish a good foundation for the eventual solution.

Step 4: Resolve conflict

- Possible question: “Can we develop possible options that take advantage of the areas where we agree, and bring us closer in the areas where we disagree?”
- Options are developed to take advantage of the areas of agreement.
- Options: apologize, dismiss, negotiate, acknowledge, and compromise.
- Possible question: “What is the best possible action to take? What actions will we take as next steps that will resolve the conflict?”

- Actions represent what each party will do as a result of the discussion, i.e., what action, by whom, by when.

Step 5: Normalize

- Possible comment: "I'm glad we were able to work through this and reach a positive solution."
- Try to leave the situation on a positive note.

Additional tips

- Avoid judging the other person or their behavior, or blaming them. Instead, use "I..." messages to explain your perspective.
- Be open-minded and acknowledge that you both have valid opinions and something to offer.
- Don't place yourself in a position of power over the other individuals or attempt to manipulate the situation to get your way. Work collaboratively to come to an amicable solution.

Adapted from: Weaver, R. G., & Farrell, J. D. (1997). Managers as facilitators: A practical guide to getting work done in a changing workplace. San Francisco, CA: Berrett-Koehler Publishers.

FEEDBACK AND DEBRIEFING

Giving and Receiving Feedback

Giving feedback to students is one of the most important aspects of being an INT D 410 facilitator. You're helping students to become better health team practitioners in the future by bringing attention to what they're doing well and what adjustments may be needed. In a way, you're holding up a mirror so they can see themselves clearly. The classroom should be a safe environment for them to learn from what they see and to try different strategies to improve their team skills.

> Q: *What* does good feedback look like?
> A: The CORBS model is a foundation of good feedback.
>
> Q: *Why* do we focus on feedback in INT D 410?
> A: For continuing improvement for both students and facilitators.
>
> Q: *How* do we give feedback?
> A: See the feedback models below for structured formats for delivering feedback.

For an introduction to giving feedback, you may wish to watch this video, developed specifically for INT D 410 facilitator training.

> Strategies for Giving Feedback (6 min)
> https://www.youtube.com/watch?v=ebagIwq8ZU8

Principles of good feedback

The CORBS model outlines the principles for constructing meaningful feedback.

Clear. Be clear about what feedback you want to give. Being vague or faltering will increase anxiety in the receiver and may not be understood.

Owned. Feedback is your own perception and not an ultimate truth. It says as much about you as it does about the receiver. It helps the receiver if this ownership is stated in the feedback, e.g., "I'm unsettled by your direct manner…" rather than "You're too pushy…"

Regular. Feedback given regularly is more useful than grievances that are saved up and delivered as one large package. Give feedback as soon after the event as possible, and early enough for the person to do something about it (i.e., not at the end of the course).

Balanced. Balance negative and positive feedback. This doesn't mean that each piece of negative feedback must be accompanied by something positive (or vice versa); rather, aim for balance over time.

Specific. Generalized feedback is not enlightening. Phrases such as "You're so unprofessional" lead to hurt feelings and resentment. A specific and owned statement such as "I feel upset when you don't tell me you're going to be late" gives the receiver information that they can choose to either use or ignore.

Giving feedback

Seek permission

One strategy we've learned over the years is to start by making it clear that you're about to give feedback, and to check that the students are open to hearing it.

> *"Is this a good time for feedback?"*
>
> *"Before you move onto the next part of the activity, I'd like to offer some feedback."*
>
> *"Let's pause for a moment and talk about what just happened."*

Set a positive tone

An INT D 410 classroom is meant to be a safe environment for students to learn and make mistakes. When they get something right the first time, they may not know what they did to get it right, and thus may not learn from their successes. Often the greatest learning arises out of mistakes. We like to say that "Mistakes are puzzles to solve, not crimes to punish."

This is a pass/fail course and students who make an effort nearly always pass, even if they make mistakes along the way. Students can focus on developing collaborative team skills rather than trying to get the top grade. They have a long road ahead of them to learn and refine these skills, and your role as facilitator is to help them see what skills they need to develop.

Provide feedback often

Provide feedback often. Tell students what they're doing well, without always balancing it with something to work on.

> *"I noticed the team worked really hard to come to consensus and everyone seems satisfied with the team's decision."*

Students want to know what skills to work on, so don't hesitate to give feedback when you notice something that could be improved. You might also ask the teams what skills they would like to receive feedback on. Students often know what challenges they face (e.g., interrupting each other, getting off topic, talking at once, etc.). Asking them to identify one team behaviour they want feedback on emphasizes their responsibility to improve.

Feedback should always be targeted, focused on either reinforcing or changing a specific behaviour, rather than a laundry list.

Acknowledge the awkwardness

This course takes many students out of their comfort zones by asking them to focus on team-based competencies rather than clinical knowledge. Help learners to recognise that they may feel uncomfortable. Try to appear relaxed and calm delivering negative feedback, and set the tone by saying, "This is an opportunity to learn." Maintain open body language and a neutral tone of voice.

Start your feedback with "I…" statements, e.g., "I see / hear / think / feel that…" and describe observations and behaviours, rather than making judgments or saying "you need to do it this way."

Feedback models

Using a structured model for giving feedback helps focus the conversation on future improvement. There are many different feedback models or structures to use, and there's no hard and fast rule about when to use each one. Rather, read through the descriptions below and see which models feel most comfortable to you, and use those with students. Being comfortable giving feedback is more important than which model you choose to use; if your body language conveys anxiety or irritation, it will interfere with the message you're trying to communicate.

Plus Delta

Plus Delta is a simple feedback model that asks what went well ("Plus") and what could be changed or improved ("Delta"). You can use this method for giving feedback to students, and it is also a good tool for asking students to give you feedback at the end of class.

> *"I noticed you had a clear plan for the discussion which helped you work through all aspects of the case [Plus]. Next time, consider assigning time to each agenda item to help you progress through the discussion in the time allotted [Delta]."*

Stop, Start, Continue, Improve

Stop, Start, Continue, Improve is another straightforward model where feedback is generated from answers to these questions:

- What should stop happening?
- What should start happening?
- What should continue?
- What should be improved?

Advocacy-Inquiry

Whether you're highlighting something the students have done well or prompting them to change a behaviour, consider asking questions that prompt students to reflect on what has happened and what could happen in the future.

In the Advocacy-Inquiry model of debriefing, start by **advocating** or describing what you observed, then **inquiring** or seeking to understand it.

> *"I saw your team come to consensus very quickly. I wonder, did everyone have a chance to provide input?"*
>
> *"When you met with the patient, it seemed like you put her at ease very quickly. How did you do that?"*
>
> *"It seemed like you were rushing to finish the activity at the end. How might you manage your time more effectively next time?"*

For more about Advocacy-Inquiry, see the Debriefing section below.

DESC

DESC is primarily a model for using assertive communication in conflict situations. However it can also be useful as a model for giving feedback.

Describe the situation that you've observed.	*"I notice that you don't have anyone taking the role of Advocate today...*
Express your concern.	*I'm concerned that, without someone to gently challenge the team's decisions, you might make plans that aren't realistic...*
Specify what behaviour or outcome you would like to see.	*I'd like someone to volunteer to take on the Advocate role in addition to the other role they're performing today...*
Consequences; explain the positive consequences of that behaviour or outcome.	*This way, you can be confident your team has considered more than one perspective before making plans."*

OBEFA

OBEFA is a scaffold or template for structuring feedback. It's a good starting place for facilitators who are uncomfortable giving feedback.

Opening statement. Simply express that you have a concern.	*"I have a concern...*
Behaviour. Describe the behaviour.	*that when your team members interrupt and talk over each other...*
Effect. Describe what happens as a result of the behaviour.	*you get so loud that you disrupt other teams...*
Feelings. Describe how you feel about this.	*and I worry that all the teams, including yours, aren't able to work effectively...*
Action. Suggest working together to resolve your concern.	*I would like us to resolve this together."*

These videos, produced by HSERC and the Centre for Teaching and Learning, demonstrate the use of OBEFA.

> Using OBEFA to Give Instructor-to-Student Feedback (Messy Condo) (7 min)
> https://www.youtube.com/watch?v=KIe3FmgW8-c
>
> Using OBEFA to Give Peer-to-Peer Feedback (Rapid Rounds) (6 min)
> https://www.youtube.com/watch?v=0MVlhILRjMs

Sandwich

The sandwich is a well-known method of giving a positive statement, followed by a negative statement, followed by another positive statement. In INT D 410 we encourage you to use other feedback models because we've observed that the sandwich can leave the recipient confused about what they're supposed to do because the positive comments seem to erase the negative feedback or desired behaviour change. And sometimes the final statement feels like an **insincere add-on** just to soften the blow of the negative statement.

> *"You were active and involved in your team meeting when you were the Initiator, but I noticed you didn't speak at all when you were the Recorder. But good job getting to class on time each week."*

However, we recognize that the sandwich is familiar and feels good because you get to end on a positive note. And we would prefer that you give sandwich feedback rather than no feedback. So, if you choose to give sandwich feedback, we challenge you to modify it by turning the final positive statement into a **moving-forward statement**.

> *"You were active and involved in your team meeting when you were the Initiator. I noticed you didn't speak at all when you were the Recorder. Help me understand how you approach each role, and let's make a plan to help you participate in whatever role you have."*

This is essentially a Plus Delta with "let's move forward together" added to the end.

Negotiating a plan to change behaviour

Occasionally you may observe a student or team behaviour that needs to be addressed with firmer feedback and a clear plan to change the behaviour. In this situation, go through the steps below to work towards a resolution.

1. Observe the student or team behaviour.
2. Ask the student or team to do a self-assessment and describe the behaviour to you.
3. Describe the desired behaviour you wish to see.
4. Determine whether the student or team understands the difference between the behaviour you observed and the behaviour you wish to see. The Advocacy-Inquiry method is helpful here.
5. Together, prepare a plan to close the gap.
6. Follow up by observing the student or team again and providing further feedback.

Please also remember that if you are concerned about any behaviour you see from your students or teams, you should notify the course coordinators at intd410@ualberta.ca.

Receiving feedback

Being able to receive constructive feedback is also a valuable skill in collaborative practice. You may wish to remind students, when giving feedback to them, that receiving feedback in a constructive manner is a skill that will support them throughout their careers. You can also model this skill by asking students for feedback and demonstrating how to respond appropriately. If the feedback is not constructive, you can request that it be reframed using the CORBS format.

Prepare to receive the feedback

First, breathe and relax. Acknowledge that it's not easy to hear feedback, especially when it's negative. Assume that the person giving feedback cares about you and wishes to be helpful. Focus on your learning and growth.

Take a moment to assess what has happened (the behaviour you'll be receiving feedback about) and how you feel at the moment.

> *"Before I hear your feedback, may I take a moment to gather my thoughts?"*

Advocate for yourself if you need a break.

> *"This has been an exhausting activity and I'm not prepared to hear feedback right now. Can we continue this after the break?"*

Actively receive the feedback

Do not be passive while receiving feedback. Listen actively to what is being said. Try to understand and seek clarification where needed. If there's a discrepancy between your understanding of the situation and what the feedback-giver is saying, work together to understand each other's perspective. Take notes so you can reflect back on the feedback later. Check your understanding by paraphrasing what has been said.

React with self-awareness

Work to manage your emotions and look at the situation objectively. Try to separate the content of the feedback from your reaction to it. If you feel threatened or unsettled by the feedback, ask for clarification or examples to make sure you understand what is being said.

> *"Can you give me an example of when I did that?"*

Avoid explaining away everything the speaker is saying. Don't say, "Yeah, but…" or offer justifications. If the feedback is overly negative, ask the speaker to rephrase it constructively.

> *"How might I have done that differently?"*

Just as importantly, don't dismiss positive feedback. If you're uncomfortable with compliments, simply say thank you.

Follow up with intention

Consider the feedback, what you can act on, and what not. On your own, or with the feedback-giver if appropriate, make a plan for how you'll integrate this feedback into your future practice.

Reflect on the feedback using What / So What / Now What:

- What: Describe the feedback as accurately as possible.
- So What: How relevant and important is it? What does it mean to you?
- Now What: What will you do as a result of receiving this feedback?

Parts of this section were adapted from: Hawkins, P., Shohet, R., Ryde, J., & Wilmot, J. (2012). Supervision in the helping professions. Maidenhead, England: Open University Press (p. 159-161).And: Bayne, R., & Jinks, G. (2010). How to survive counsellor training: An A-Z guide. New York: Palgrave Macmillan (p. 64-67).

Debriefing

Debriefing can be the most intellectually demanding component of facilitating INT D 410. Students sometimes comment that this aspect of the course seems unproductive. However, done effectively, debriefing helps students gain insight into their experiences, rather than "going through the motions" for a grade. A good debrief means asking good questions to lead students to reflect and learn from their experiences.

Classroom activities typically begin with a pre-brief where you set the stage for the students, explaining the activity and its objectives. Then, while students carry out the activity, you observe team interactions, ask questions to prompt teams to think more deeply about how they work together, and offer feedback. Finally, you debrief the activity, asking questions to encourage deeper thinking, reinforcing the learning that has taken place, and linking the activity to future practice. Be mindful that debriefing is a tool for learning, not grading.

Why debrief?	• To seek feedback for improvement. • To model good practices. • To understand students' understanding of course concepts.
When to debrief?	• During small group activities (ask students to set up an empty chair at every table). • In the classroom, after activities and after a TOSCE. • After a simulation (dedicated time is provided for debriefing).
What to debrief?	• Team processes and roles. • Relational dynamics. • Focus on interprofessional competencies rather than clinical knowledge.
How to debrief?	• Ensure a safe learning environment (mistakes are puzzles to solve, not crimes to punish). • Let learners do most of the talking. • Protect time for debriefing and look for opportunities for spontaneous debriefing. • Seek, accept, and give feedback. • The debrief should have structure (see the debriefing tools, below).

Debriefing tools

What? So What? Now What?

Using a funnel model of debriefing, first ask the teams "What?" (reflection), then move on to "So What?" (integration) and finally "Now What?" (continuation). This may provide a framework for the teams for each class. This model of debriefing also echoes and supports the Reflection Guide that students use in formulating written reflections.

Stage	Purpose	Sample questions	Sample responses
What?	Reflection	"What happened?" "What are the facts?"	"We read the case study and started developing a care plan for this patient, but we ran out of time."
So what?	Integration	"Why does this matter?" "What is the impact?"	"We weren't able to address the patient's mobility concerns. We have a plan for how to treat her at the clinic, but no plan for how she'll get to the clinic. This means she might not get the care she needs."
Now what?	Continuation	"What's your plan to improve yourself or your team going forward?" "How will this impact your future practice?"	"For the next case study, we'll set a time limit for each step of developing the care plan, and move on when the timekeeper says time is up. If there's time left at the end, we can circle back to anything we missed." "In our future practice we'll remember that if we spend too much time on one topic, we may miss other things that are important to our patient's care."

Advocacy-Inquiry

Using the Advocacy-Inquiry method allows you to explore students' frames and understand why they chose their particular actions or decisions during an activity. You begin by **advocating** for what you have observed ("I noticed that…" "I heard you say…"). Then you seek to understand by **inquiring** about the students' perspective ("Help me understand…" "I'm wondering…").

Phase	Purpose	Process	Example Script
Prebrief	• Prepare students for simulation • Set the tone	• Provide info on format • Provide observation guide • Review preceptor report	• "Today, you will invite the SP into the conference room at 6:00. You will have 15 minutes to complete …"
Debrief: React	• Encourage participation/ build rapport • Allow learners to clear the air and save face	• Use Delta-Plus process with 2 questions to examine what worked and areas for improvement	• "What went well?" • "What would you do differently?"
Debrief: Understand	• Uncover the ideas, thought processes and other factors that lead to a behaviour (student 'frames'*) • Help the learner find ways to improve performance	**Advocacy-Inquiry** 1. **Observe** an event or result 2. **Comment** on the Observation **Advocate** for your position 3. **Explore the Drivers** behind students' thinking (their 'frames'*) and actions that they think lead to the observed event or result 4. **Discover**, with the students, ways to attend to issues that arose and ways to replicate positive results	1. You notice that the patient seemed to disengage when the team started listing their recommendations 2. "I noticed that Mr. Moorhouse crossed his arms and didn't respond to a lot of the recommendations you suggested. To me, he seemed disengaged" 3. "What do you think was happening for him?" "Do you think he disengaged?" "What was happening that contributed to this result?" 4. "I agree that it's important to be clear about what the team recommends. I wonder how your team could approach recommendations to engage Mr. Moorhouse and to ensure clarity?"
Wrap-Up	• Invite reflection on the experience as a whole – solidify learning	• Inquire about how students feel about the simulation as a whole and what learning they will take away	• "How are you feeling about the scenario now?" • "What's the biggest thing that you'll take away from the simulation?"

*Frames are in the mind of the student and facilitator. They include: assumptions, feelings, goals, knowledge base, situational awareness, and context.

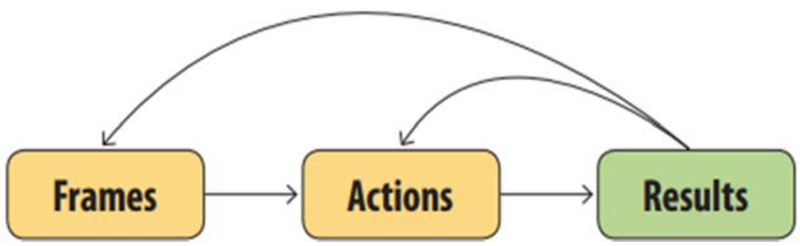


Figure 1. Frames, Actions, and Results

Adapted from: Lisa Guirguis and Cheryl Cox. University of Alberta PharmSim Program. Framework adapted from: Rudolph, J.W., Simon, R., Rivard, P., Dufresne, R.L., & Raemer, D.B. (2007). Debriefing with good judgment: Combining rigorous feedback with genuine inquiry. Anesthesiology clinics 25(2), 361-376. doi:10.1016/j.anclin.2007.03.007

Source: Faculty of Pharmacy and Pharmaceutical Sciences, University of Alberta. (2007). Debriefing using the Advocacy-Inquiry method. Retrieved from the University of Alberta, Virtual Interprofessional Educator Resource (VIPER) website: http://uab.ca/viper

Further tips and prompts

Classroom debriefing tips

- Ask for teams to volunteer information instead of going to each team. Ask for one key point from each team.
- Ask each table a different question to respond to.
- Describe the team process you observed with a team during the class, then ask for comments/feedback about the accuracy of your observations.
- Vary the debriefing method you use from class to class. If students seem tired of simply “rehashing” the exercise they’ve just completed, then try new ways of asking for input.
- Always ask yourself, “What is the purpose of this debrief?” to make sure it’s relevant. Don’t use it as a means to keep the students until the end of class. Students quickly see through this tactic and get turned off. Remember: it’s better to end class a little early on a positive note than to insist that they contribute right until the end just for the sake of keeping to the class schedule.
- If a student asks you a question you can’t answer, turn it back over to the class. Ask if someone in the room has relevant experience or knows the answer.
- Encourage empathy. We all feel like we’re being judged when we’re speaking in front of others.

- Ensure that no major errors in communication and teamwork have been overlooked.
- Use positive statements: "This is a practice, where no real patients are affected. If you encounter difficulties like this in your future practice, you should be better equipped to deal with them. This scenario should give you confidence."
- Give students the opportunity to discuss the activity again at a later time if they have additional questions or concerns.

Useful phrases

There are many ways to phrase what you have observed. It's best to avoid "why" questions, or any phrase that could be taken as punitive or judging. You may have an idea about how an activity should be carried out, but there are valid reasons why the students might have gone a different direction. The facilitator's role is to find out why the students chose the actions they did, and then find a way to address both your concerns and the students'. Here are a few phrases to try:

> *"I noticed that…"*
>
> *"I'm curious about…"*
>
> *"I was wondering about…"*
>
> *"What did you think when…"*
>
> *"Could you tell me more about…"*

Phrases to avoid

Phrases that speak from a position of authority, or that prescribe what "should have happened" might be accurate but don't help us understand why events unfolded the way they did. Generally try to avoid these phrases:

> *"You shouldn't…"*
>
> *"I wouldn't…"*
>
> *"Why did you…"*
>
> *"Why didn't you…"*

General debriefing questions after a class activity

"Did you find the exercise challenging?"

"What made the exercise difficult?"

"What helped?"

"What might make it easier?"

"If this were to happen in your future practice, what would you do differently?"

"Has anything like this happened in your life? If so, what did you do?"

"What real-world systems or structures would affect a scenario like this? How would you deal with them?"

General debriefing questions after a simulation

"How do you feel that went?"

"What were your first impressions when you began the scenario?"

"Do you feel that you were adequately prepared?"

"What were the sources of information for the scenario? What extra information might have been helpful? How did you deal with not having that information?"

"Who was the leader at the outset? What made that person the leader? What skills did leadership require?"

"How effective was the team in collaborating? What does effective collaboration look like in this context?"

"If you were to construct the ideal team for this scenario, what characteristics would it have?"

STUDENT ASSESSMENT

Assessment Overview

Some details regarding student assessment are specific to each stream of INT D 410 and can be found in the stream's course outline (syllabus). Student assessment in this course generally includes the following elements:

- Professionalism (attendance and active participation)
- Online activities (e.g. text-based discussion forums)
- Written reflection assignments
- Team Objective Structured Clinical Examination (TOSCE)
- Team project

Professionalism

INT D 410 is based on process learning, requiring attendance and participation. In order to receive full marks professionalism, students must attend all classes, participate actively in team activities, and conduct themselves in a professional manner. Professionalism marks are awarded at the discretion of section facilitators.

Facilitators will take attendance each week; you may find it easiest to do this on a team-by-team basis since the students will be sitting in their teams for all activities.

If a student is consistently late or absent, you should first speak to that student and see if there are issues that you can assist with as a facilitator. (For example, if a student is late because he/she is running here from another class, but is making a good faith effort to get here on time, you might arrange for that student's team to sit near the door, and keep the chair closest to the door empty so the late student can slip in quietly.) However, persistent issues should be brought to the attention of the course administrators for follow up.

Online Activities

Students complete online activities such as posting to a discussion forum or watching videos about the course concepts. Facilitators will participate in the discussion forums (posting questions to students and contributing to the discussion), but are not required to mark student posts. Instead, course administrators will check the usage logs in eClass (the online course management program) to verify that students have completed the assigned activities.

The Online Activities mark applies only to Class 1 (for the Winter-only version of INT D 410) or Module 2 (for the two-term version) where students complete readings, videos, and discussions online.

Students are encouraged to continue using the discussions and online resources throughout the course, however this additional usage does not directly contribute to their grades.

Written Reflection Assignments

Reflection assignments give students the opportunity to think intentionally about something that has happened, what was significant, and what they have learned for the future. The University of Hull (UK) has a great video about writing reflection papers. All INT D 410 students and facilitators are encouraged to watch it: https://www.youtube.com/watch?v=b1eEPp5VSIY

The Guide to Writing your INT D 410 Reflection (often just called the "Reflection Guide") includes a detailed marking guide for facilitators. This promotes consistency in marking among all facilitators across the course. This guide is shown on the next two pages, or see the full-size version online at: https://sites.ualberta.ca/~hsercweb/pdf/Reflection_Guide_Rubric.pdf.

The Reflection Guide requires students to refer to "external sources" but this does not necessarily mean academic literature. An "external source" might be something they saw on the news, something they learned in another class, or a relevant life experience. Broadly speaking, we want students to relate what they're learning in INT D 410 to lessons or life experiences from outside the course.

Finally, note that reflection papers are always marked out of 10 points (the rubric has 5 criteria, each worth up to 2 points). However, the papers might count as 5%, 10%, or 15% of a student's final course grade. You'll still always mark the reflection paper out of 10 points, and then eClass will do the calculations to give that assignment the appropriate weighting.

Guide to Writing Your INT D 410 Reflection

What is Reflection?
Reflection is a thinking process that occurs before, during and/or after situations with the purpose of developing greater understanding of oneself and events so that future encounters can be improved.

You may have participated in forms of reflections such as journaling, narrative writing, structured reflection with prompts, and oral processes like debriefing.

Initially, reflection may feel awkward as reflection is not necessarily intuitive. Practice over time can help to develop the reflective habit of mind necessary for competent professional practice.

Why Reflect?
A reflection is an important tool for self assessment and practice improvement.

Why Do Teams Reflect?
The high stakes nature of health care combined with the diversity of personal background, education, and professional perspective among team members demands an ongoing process to navigate differences and improve processes.

How Do Teams Reflect?
Two reflective steps can enhance team function:

- Individuals deliberate on their contributions to the task and team process.
- Teams generate plans for improved performance while considering outside sources and their shared reflection on individual and collective performance.

While individual reflection is valuable; intentional collaborative analysis by all team members is necessary to plan for and implement change that is feasible.

How is an INT D 410 Reflection different than other papers?

	INT D 410 Reflection Assignments	Traditional Academic Assignments
Content	Candid analysis of personal experience	Critical analysis of scientific question or hypothesis
Style	First person narrative	Formal writing style
Sources	External sources are sought and applied to personal experience in order to deepen thinking and improve practice	Academic literature is cited to support the thesis

A reflection answers 3 questions:
What? The facts of an event
So what? The impact of an event
Now what? The plan for individual or team improvement.

Guide to Writing Your INT D 410 Reflection

How To Write A Reflection		How Reflections Will Be Graded		
Stages of Reflection	**Questions To Guide Your Reflection**	5 criteria, maximum 2 points each, no half points		
		0	1	2
What? Describe the event, issue or situation	• What happened? • What was your professional and team role in the event? • How did other team members, including the patient/family, contribute?	Event description absent.	Description of event(s) feelings, knowledge and/ or ideas is vague or lacks relevance	Concise description of relevant event(s), feelings and knowledge and ideas of self/others provided.
So What? Interpret the event in relation to the context[1].	• What was your emotional response to the event? • How does the event relate to your personal ethics or values? Other team members? • What expectations/assumptions did you/your team have? Were they confirmed or challenged? • What were your personal or professional strengths and/or limitations in relation to the event? Other team members? • What other factors may have affected the event? • What organizational, historical or sociological implications does the event have?	Analysis of event absent.	Analysis of contextual factors vague or lacks depth/relevance.	Meaningful analysis and personal insight on contextual factors provided.

So What?
Test your analysis against external sources such as:
• Feedback received and/or
• Credible written or media sources[2].
	• How does your interpretation align with external sources like –
	  • Feedback from patients, community members, facilitators, team members or peers?
	  • Your profession's standards of practice or code of ethics?
	  • Lectures you have heard?
	  • Articles you have read?
	  • Videos you have watched?
		External sources not discussed.	External sources not clearly linked to personal experience.	External sources clearly integrated in analysis of personal experience.

Now What? Based on your analysis of the experience, outline a plan for your learning needs or changes to individual or team practice	• What implications does the event have for your future practice? • What knowledge or expertise is needed to support your future practice? • How will you acquire that knowledge or access expertise? • How will you approach a similar event in the future? • Any factors from this experience that remain uncertain? How might you grapple with these unclear issues going forward?	Implications for future action not identified.	Planning for future action is incomplete, vague or not feasible.	Well-defined, relevant plans for future action outlined.
Clarity & Organization of writing.		Writing disorganized, difficult to interpret.	Writing shows some organization.	Ideas clearly and logically conveyed.

[1] Interpretation of context involves exploring factors surrounding an event and its participants. These factors may include gender, race, age, profession, policies and practices of organization, environment, and history.

[2] Includes though not limited to journal articles, books, videos, professional websites or grey literature (government, academic, business, and organizational documents not controlled by commercial publishing, including Standards of Practice, the Health Professions Act, etc.).

There is no expectation that students will agree with the external sources, though in those cases students should clearly analyze the disagreement and outline what actions they will take moving forward.

TOSCE

The Team Objective Structured Clinical Examination (TOSCE; pronounced “TOSS-key”) is a practical exam where students are given a scenario, usually a clinical case study, and asked to work through a process together, usually developing a care plan for the patient in the scenario.

INT D 410 course administrators provide training each year on how to score the TOSCE. The TOSCE Rubric can be viewed at https://sites.ualberta.ca/~hsercweb/pdf/TOSCE_Rubric.pdf.

A video example of the TOSCE is available online:

- Scenario and instructions: http://goo.gl/oxf4T9 (pdf)
- Example of a TOSCE: https://www.youtube.com/watch?v=yNFnstUxWgE (9 min)
- TOSCE Facilitator Feedback: https://www.youtube.com/watch?v=95UfUsy96S4 (3 min)

TOSCE marking guidelines

- There’s no one right way for students to complete a TOSCE. There isn’t a perfect patient care plan that they’re supposed to figure out. Instead, you’re marking them on whether they’re carrying out their team roles (Initiator, Recorder, etc.) and demonstrating the competencies (Communication, Collaboration, Role Clarification, and Reflection).
- The TOSCE is a team activity and the mark given applies to all members of the team.
- A quiet student is a team issue. Other team members should draw that student out and encourage him/her to talk.
- Even without a patient (or standardized patient/actor) in the room, students should be considering the patient’s perspective. For example, they might say, “We’ve identified two possible plans and we’ll let the patient decide what will work best for them.”
- Students are not being graded on their clinical knowledge. Many of them are early in their programs, and the purpose of INT D 410 isn’t to test whether they can come up with the best possible care plan. Again, the purpose is to assess their teamwork.
- The team roles (Initiator, Recorder, etc.) are assigned to students randomly when they enter the room. Role cards are placed face down on the table and, once all the students are in seats, they turn over the card in front of them. Students may not swap cards.

- Each facilitator fills out the TOSCE Rubric for each team. After you've seen all the teams, you'll meet with your co-facilitator(s) to review your marks for each team and reach an agreement on each team's final score.
- Students must be wearing name tags showing their names and disciplines, or they face a deduction. Handmade name tags are acceptable.
- Students are responsible for keeping track of time during the TOSCE (this is the role of the team's Timekeeper), but you should also keep track of time and cut students off at the end of the designated time and deduct marks if needed.
- The students conduct their own debrief, lead by their Process Analyst, at the end of the TOSCE. You're marking students on this debrief.

TOSCE marking tips

- Ahead of time, discuss with your co-facilitators whether you'll each watch for specific things in the TOSCE, or will you all be watching for everything.
- Keep on track! TOSCEs take place back-to-back-to-back, so start on time even if a student is late.

Debriefing the TOSCE

- After a team completes its TOSCE and student-lead debrief, you'll have a couple minutes for a facilitator-lead debrief.
- Give students brief, specific feedback on what they did well and what they could improve on. Avoid just a simple "good job."
- Typically, you don't give students their grade during this time because you still need to confer with your co-facilitators to decide on a mark. Also, how students behave during this facilitator-lead debrief is still being graded. The TOSCE Rubric contains a section for Reception of Feedback.

Team Project

Each team of students prepares a project to present on the last day. The format for these projects is wide open – students can do whatever will fit into the allotted time (10 or 15 minutes in most course sections). In the past, some teams have made quiz games, videos, skits, and more. This creativity is encouraged, and forms part of their mark for the project, but the bulk of their mark should be based on whether students have demonstrated an understanding of the course concepts: team roles, interprofessional competencies, and teamwork.

In some specialty streams of INT D 410, the student teams complete a more specific team project, but still need to demonstrate an understanding of team roles, interprofessional competencies, and teamwork.

STUDENT TIP SHEETS & WORKSHEETS

Team Functional Roles

The roles are described below. On a small team, individual members should double up on some roles; on a larger team, multiple people can be assigned to the Participant role. The Process Analyst should regularly provide feedback to the team on their processes, and ensures the team debriefs in an intentional manner.

Initiator	❒ Guide the team in setting appropriate objectives and goals ❒ Lead the team in deciding approach and execution strategies ❒ Ensure all members participate and are treated with respect ❒ Oversee information gathering ❒ Ensure that goals take precedence over problems/conflicts ❒ Keep the team on task and on time to meet deadlines ❒ Lead a team debrief at the end of each meeting
Recorder	❒ Clarify ideas to eliminate vagueness and imprecision ❒ Summarize ideas and synthesize team discussion ❒ Clearly document group activities/decisions ❒ Assists initiator in ensuring that meeting remains on task
Timekeeper	❒ Keeps track of time remaining for a particular activity ❒ Assists initiator in ensuring that meeting remains on task ❒ Assists initiator in re-aligning agenda and priorities when there is not sufficient time to complete tasks
Energizer / Encourager	❒ Bring people in who have not contributed to the discussion ❒ Suggest ways to increase sharing of ideas, participation of all ❒ Maintain a positive attitude and ensure that team members are engaged ❒ Energize the team when motivation is low; keep spirits up ❒ Bring out the best in each person by being an encourager ❒ Use humour, change of strategy, or surprise to achieve a positive team environment ❒ If some members are joining the meeting remotely (e.g. via phone or videoconference), ensure all members can hear and be heard
Advocate	❒ Advocates for perspectives that are underrepresented or unheard ❒ Ensure that multiple possibilities are explored ❒ Suggest alternative ideas or opinions (play 'the devil's advocate') ❒ Help the team evaluate the practicality of plans and expectations
Participant	❒ Observes team process and assists any role that requires support ❒ Move between roles as needed ❒ Assist a member in performing an assigned role, as negotiated ❒ Assess where additional team roles are needed and take on that role

Process Analyst	❒ Observe and review team process (e.g. use this table as a checklist)
	❒ Provide feedback on team process issues, including:
	    ❒ Approaches to decision making
	    ❒ Approaches to conflict
	    ❒ Functions of the other team roles
	    ❒ Providing feedback to team members
	❒ Ensure the team debrief covers questions such as:
	    ❒ *What*: What did you observe regarding performance of each assigned role?
	    ❒ *So What*: What was the impact of these actions have on team process? How did gaps in performance impact function? What needs to change?
	    ❒ *Now What*: How will you adapt for next time?

What do I bring to my team today?

Each team member is responsible to bring three things to their team every day:

1. **Personal contributions** such as life experience, talents, and knowledge. This is what you walk in the door with.

2. **Professional contributions** such as your scope of practice, clinical knowledge, and practicum experience. This is what you learn in your health science education program.

3. **Team functional role** such as the behaviours you use to support team members, move the work forward, and build team cohesion. This is what you learn and refine in INT D 410.

Why and how do we assign functional roles?

When a team is meeting or working together, each member takes on a special role in addition to working on the task at hand and representing their profession. These team functional roles support and improve how the team works together. In the “real world” these roles are rarely formally assigned, but high-functioning teams do demonstrate all these roles in some way. Practicing them now will ensure your team functions well in the course, and help hone your skills so that you can call on them in your future practice.

Each class, each team member takes on a functional role, and the roles rotate each week. You may wish to use a chart like this to track role assignments for the term.

Date	Initiator	Recorder	Time-keeper	Energizer/ Encourager	Advocate	Process Analyst	Partici-pant	Partici-pant

Team Charter

A full-size version of the Team Charter will be provided in class.


UNIVERSITY OF ALBERTA HEALTH SCIENCES COUNCIL
Health Sciences Education and Research Commons

TEAM CHARTER

Why a team charter?
Living document that:
- can shorten the time teams spend forming and storming by clarifying purpose and process,
- can be used by team to reflect on and can evaluate performance later

Made together and defines:
1. What you will be doing (task)?
   - Purpose, goals and expected outcomes
   - Responsibilities to support goals
2. How you will be doing it (process)?
   - Procedures for information sharing, decision making, problem solving
   - Values and behaviours that build relationships (courtesy, trust, commitment)

The ethical values below might prompt thinking and discussion needed to begin to define the culture of your team.

Confidence believe in the value of your contribution
Flexibility change, play
Generosity make space for others
Humility knowledge/contribution is partial
Integrity commit to and follow through

From Frodeman R, Thompson Klein J and Mitcham C (2010). The Oxford Handbook of Interdisciplinarity. Oxford University Press

What is your purpose?:

Building on your purpose, define 3 goals and their anticipated outcomes:

a)

b)

c)

How will your team function effectively? Outline the strategies that will support you.

Outline the behaviour(s) needed to build and preserve relationships:

Outline the roles of each or specific team members that are needed to support any particular team goals.

Identify what action(s) the team will take to hold members accountable when responsibilities are not carried out.

When will you review this document?

Who are you? Select a team name that reflects your team composition and/or goals:

Team Name:

We the undersigned members of team

commit to the goals and processes described in this document.

What Good Teamwork Looks Like

Here are eleven competencies for effective teamwork.

1. Demonstrate a client-centered focus
A good team has as its first priority meeting the client's needs and respecting their values and preferences. The client may be the patient, a family, a community or an audience.

2. Establish common goals to guide team actions and outcomes
This may include short- and long-term goals. Ensure that all team members, including the patient and family, agree about what constitutes a successful outcome.

3. Understand the role of each profession
Team members must be familiar with the professional capabilities of each person on the team and must be willing to acknowledge greater expertise and, in some instances, defer to other team members.

4. Show flexibility in roles
While it is necessary to understand and respect each person's specific role (scope of practice), flexibility in assignments is important. Achieving common goals is more important than individuals' preferred roles.

5. Demonstrate confidence in other team members
Consider and value the opinion of others and work toward building this confidence over time.

6. Share expectations of group norms and rules
Ensure everyone is aware of the expectations of others in the group. The expectations are often behavioral, e.g., being punctual, participating equally, and staying current in one's field.

7. Acknowledge and resolve conflict
Every healthcare team will experience conflict. A successful team will identify a specific mechanism, clearly understood by all, for resolving conflict through a team leader, outside leader, or other process.

8. Communicate effectively

Effective communication involves consideration of what is shared and how it is shared. Teams also need to listen effectively and develop a consistent record keeping system (electronic or other), and use a common vocabulary.

9. Share responsibility for team actions

Each team member must share the responsibility for the actions of the team and be willing to be held accountable for those actions. Team members should use "we" in communication when discussing team decisions.

10. Be open to giving and receiving feedback

The team process must be open for evaluation and revision on a continuing basis. A specific mechanism must be developed for ongoing evaluation of team's effectiveness and redesign as needed.

11. Develop a decision making process

Establish a decision-making process acceptable to all members and appropriate to the needs and goals of the task. Work to balance task and process.

Adapted from University of Minnesota, 1996.

Stages of Team Development

There are four stages of team development; teams may proceed through all stages, get stuck in one stage, or sometimes move back to a previous stage (e.g., when there are new team members). Understanding these stages helps your team see how it's progressing and address potential barriers.

1. Forming	
Work to be done	• Understand the purpose of the team • Get to know the other team members
May involve	• Activities to assess the skills, knowledge, and work styles of the others • Defining project goals
Behaviors and dynamics that may be observed	• Introductions • Uncertainty regarding purpose and goals • Uncertainty of one's roles • Tentativeness or feelings of anxiety • Testing each other's boundaries • Enthusiasm
Questions to be answered	• Why are we here? • Who are these people?
Problems that may need to be addressed	• Team members going in different directions • Not recognizing resources within the team

2. Storming	
Work to be done	• Identify what individuals expect from each other • Identify how the team expects to work together
May involve	• Stating expectations • Identifying differences

Behaviors and dynamics that may be observed	• Conflict, both within and outside the team • Uncertainty about roles • Resistance to team formation • Frustration • Discrepancy between hopes and reality • Competition • Possible formation of cliques
Questions to be answered	• What do I expect from others? • What do they expect from me?
Problems that may need to be addressed	• Conflict due to failing to meet expectations • Unbalanced workload between team members • Some members may feel unimportant or not useful

3. Norming	
Work to be done	• Resolve differences in what members expect of each other and how they will work together
May involve	• Establishing ground rules about how the team works together
Behaviors and dynamics that may be observed	• Negotiation • Identifying commonly held purpose • Team beginning to work together, oriented to accomplishing mutual goals • Members supporting leadership and each other • Cooperation • Development of harmony, trust, and respect
Questions to be answered	• How are we going to work together?
Problems that may need to be addressed	• Team members not agreeing on how they will work together • Team members working at cross-purposes with other team members

4. Performing	
Work to be done	• Activities that lead the team to accomplishing its mandate
Behaviors and dynamics that may be observed	• Clear role definition and ability to flex between roles • Collaboration and interdependence • Consistent, excellent performance • High satisfaction among members
Questions to be answered	• How will we know when we have been successful?
Problems that may need to be addressed	• Incomplete work • Team unaware of shortcomings or errors

Model developed by Bruce W. Tuckman, 1965. Weaver, R., & Farrell, J. (1997). Managers as facilitators: A practical guide to getting work done in a changing workplace. San Francisco: Berrett-Koehler Publishers.

Feedback Guide for Student Observers

This form will help guide your feedback when observing another team's interview. Decide in advance how you will provide feedback to the team. Note that it is not necessary to observe or provide feedback in every area. From your team's notes, select 2-3 pieces of feedback to provide to the team, focusing on what will be of most value to them.

Suggested areas for feedback	Your notes
Communication: • Observations about tone of voice or body language • Patient-centred language (e.g., jargon is clarified) • Conflict management	
Collaboration: • Meeting flow • Use of team roles • Decision-making strategies employed	
Role Clarification: • All professional roles clarified • Professional roles worked together • Use of role overlap	
Reflection: • Team's evaluation of their own process	

How to Conduct a Family Conference

The purpose of a family conference is to provide a forum for family members and the health care team to discuss any issues of concern and develop a collaborative plan to address those concerns.

Type of conferences

A family conference can be used for a variety of reasons: facilitating lifestyle changes, making major care decisions, planning for complex transitions in care, disclosing harm, addressing conflict, and more.

In INT D 410, family conferences are typically admission or discharge conferences. The scenarios used for these meetings are somewhat different than would occur in clinical settings, but here are some general characteristics of these conferences.

Admission conference

The purpose is to develop a plan for in-hospital care. It aims to outline and obtain agreement on the nature of the patient's issues and the strategies to be used to investigate and manage those issues. It includes members of the healthcare team, the patient, and members of the patient's family if possible.

Discharge conference

The purpose is to develop a plan for continuing care outside of the hospital. It aims to make the patient's transfer to an outpatient setting easy and successful. It includes members of the healthcare team, the patient, members of the patient's family if possible, and those involved in continuing care.

Steps for leading a family conference

- Establish the purpose for the conference and consider who needs to attend.
- Ask the patient which of their personal supports (e.g. family members) they want to attend.
- Consider which team members will be needed at the table.
- Consider any other services involved (e.g. psychiatry, home care, child and adolescent protection team).
- Develop a strategy for conducting the conference.
- Create an environment in which each family member feels safe and supported.
- If the meeting might be distressing for the family, have tissues available.
- Communicate clearly and openly.
- Document the medical information given by staff, as well as any questions or information from the patient and family.
- Set goals that are clear, mutual, and attainable. Prioritize the goals.
- Establish a plan that allows the family to collaborate with the team in addressing the issues of concern.
- Identify resources and supports that are available to the patient and family.
- Provide a summary of the conference to the patient and family

Adapted from: McDaniel, S. H., Campbell, T. L., Hepworth, J., & Lorenz, A. (2005). Family interviewing skills in primary care: From routine contact to the comprehensive family conference. In Family-oriented primary care (2nd ed.). New York, NY: Springer.

How to Run Rounds

Interprofessional team meetings, or rounds, are held to review each patient's care plan and identify what needs to be done to move the plan forward. Rounds are brief, structured, and require effective communication and collaboration.

Meeting structure

1. Review the status of tasks assigned at previous meetings.
2. Discuss the patient's concerns and any emerging issues. For inpatients, discuss any barriers to discharge. For outpatients, discuss any barriers to accessing treatment or adherence to care recommendations.
3. Identify actions required and the team members responsible to carry them out.

Cornerstones of effective rounds

Consistency	***Clarity***
Rounds occur at a regular time with a consistent facilitator. They start and finish on time.	Team members use clear language. By the end of the meeting, everyone knows *who* will do *what* by *when*.
Accountability	***Transparency***
The team records any assigned tasks, and follows up on those tasks at the next rounds.	Each patient's care is shared with the patient and/or family.

Interprofessional Competencies Self-Assessment

Use this worksheet to assess your skills in the core competencies, based on your performance in various team activities (e.g., team meetings, discussions, simulations, group assignments, the TOSCE, and the team presentation project). Mention specific examples whenever possible. There are no right or wrong answers. You don't need to hand this in, but you can use your notes from this worksheet to guide you in writing your final reflection.

Communication: Communication skills that enhance interprofessional team function. Consider your skill at: • Using appropriate non-verbal communication. • Adapt to the communication needs of your listener. • Managing conflict. • Giving, receiving, and integrating feedback.	
Collaboration: Interprofessional team process skills that achieve common goals. Consider your ability to: • Identify and use team functional roles (e.g., initiator, recorder, etc.). • Negotiate shared goals with your team and the patient.	
Role Clarification: Understanding one's own role and the roles of others in an interprofessional context. Consider your understanding of: • Your professional role and the roles of others. • Professional role overlap and boundaries within interprofessional teams. • How to negotiate the role of the patient, family, and community in providing care.	
Reflection: Critical evaluation of professional and team practice in an interprofessional context. Consider your ability to: • Reflect on your individual and team performance in order to improve your interprofessional practice. • Integrate feedback to improve your interprofessional practice. • Integrate educational resources, professional literature, and life experiences to improve your interprofessional practice. • Analyze organizational factors that impact your interprofessional practice.	

Notes