

Effective Debriefing - Guided Performance Review



Just because you can't see it, doesn't mean it isn't ...

Dr Irwyn Shepherd SimConHealth



Session Objectives

- Describe the purpose of guided performance review (effective debriefing) using constructive feedback
- Review the measures in ensuring safe learning occurs
- Describe the various applications where constructive debriefing can be applied
- Facilitate Reflective Practice

Common Elements of Debriefing

Learning occurs through comprehension and application of content, repetition of procedural skills and contextual training

Significant learning occurs when deep insight is made explicit through reflection during debriefing

Common elements include:

- Discussion of the experience
- Critique
- Correction
- Evaluation of performance

Definition and Objectives of Debriefing

Intentional and important process designed to synergize, strengthen and transfer learning from an experiential learning exercise

Objectives of debriefing :

- Identification of different perceptions and attitudes that have occurred
- Linking the exercise to specific theory or content and skill-building techniques
- Development of a common set of experiences for further thought
- Opportunity to receive feedback on nature of one's involvement, behavior, and decision making
- Reestablishment of the desired classroom climate, such as regaining trust, comfort, and purposefulness.

Further defining information

Debriefing is a conversation among two or more people to review a real / simulated event or activity in which participants explore, analyze and synthesize their actions and thought processes, emotional states and other information to improve performance in future real situations

High participant engagement is a hallmark of strong debriefings because it leads to:

- deeper levels of learning
- increases the likelihood of transfer to the work setting
- encourages reflective practice



Educational Background

- Debriefing as teaching strategy supports a constructivist theoretical framework within problem-based learning experience
- Constructivist learning is a contextual and experiential process
- +
 - Reflective practice (Schön: 1983)
- +
 - Critical thinking / clinical reasoning / clinical judgement

Reflective Practice

Reflective Practitioner (Schön: 1983)

... experience(s) surprise, puzzlement, or confusion in a situation which ... (seems) ... uncertain or unique ...

He reflects on the phenomenon before him, and on the prior understandings which have been implicit in his behaviour.

He carries out an experiment which serves to generate both a new understanding of the phenomenon and a change in the situation.

Exposing Self to Scrutiny

(Schön 1983: 68)

Variables

Reflection in action

- Facilitation with ongoing discussions during a session

Reflection on action – using recall

- Facilitated group discussion after a simulation scenario

Reflection on action - using objective data

- Video assisted discussion after a simulation scenario

Reflection beyond action

- Looking forward: "seeing the future while seeing the past"

While Debriefing ...Never ...

- Generate an atmosphere of targeting participants
- Use questions that leave the participant guessing what answer you are after
- Identify and inform a participant what they did wrong
- Use video playback to point out performance shortcomings in a negative way
- Use the session to apportion blame to a participant

Feedback & Debriefing - 1

- Assists and augments the experiential element
- Reflective learning is recognized as a powerful education strategy
- In the scenario setting it is the best facilitation process for individual reflection while also encouraging group reflection around the learning activity
- It allows for constructive performance feedback

Feedback & Debriefing - 2

- The review process allows review of learning objectives and identifying linkage to outcomes
- Provides the linkage back to the reality of clinical practice, operational and systems processes, individual and organisational responsibilities and accountabilities
- It allows for reinforcement of evidence in practice

Ensuring a safe learning place

- Discuss roles and expectations / boundaries prior to the session
- Be clear and unambiguous about the learning objectives of the exercise
- Discuss the reason for, the structure and application of feedback and debriefing with participants before the session
- Ensure all participants are cognizant of and agree to a confidentiality clause regarding simulation education

A safe learning space

A safe learning environment is where participants are more:

- * Involved or immersed in learning activity
- * Willing to 'have a go'
- Open to feedback and debriefing processes

What to do

- Ensure participants are comfortable by supplying appropriate facilities and services
- Ensure participants are in a position to do so
- Establish rules and agreements and an environment where it is OK to identify shortcomings
- Acknowledge the limitations with simulation and how this may impact on performance
- Be specific, not generalised
- Discuss management issues as a group, not with an individual
- Focus on each participant's needs

What not to do

- Adopt a lecture or presentation tutorial format when providing feedback
- Make the participants feel uncomfortable by targeting individuals about their actions and comments
- Constantly interrupt
- Use misleading and anxiety generating questions
- Link simulation exercise outcomes with performance

Pause and Discuss Sessions

- As the scenario unfolds the Instructor/Facilitator/technician strategically stops the scenario to point out and discuss clinical, technical, interpersonal, communication and other operational issues that impact on individual performance and team function
- This means participants receive immediate feedback during the pause time. At the end of the scenario a further debrief using reflective learning can offer further reinforcement
- The role of the Instructor or Facilitator on the floor is pivotal, as they are in a position to influence greatly the participants at their most vulnerable.
- How they facilitate this process is important in seeking to generate positive outcomes and influence subsequent behaviours

Reflection *in Action*

- Using the pause strategy interrupts the flow of the scenario, so should be undertaken with a level of awareness of where the participants are at that moment
- The language is important. The use of open-ended real time questions often help lead the discussions and it is important to provide participants enough time to make decisions and answer questions

Examples: “What is happening at this point in time?”
“What is needed to be done now?”

- The Instructor or Facilitator then needs to recap the events and before recommencing the scenario – makes sure all of the participants recognize where the scenario should be heading

Reflection *on* Action

- This is where the debriefing occurs after the scenario has finished
- The questions need to seek out what the participant's perceptions are of the event

Examples:

What did it feel like?

What do you believe went well? Why?

What do you believe was difficult? Why?

What do you believe you would do differently?

Why?

What do you believe you have learnt?

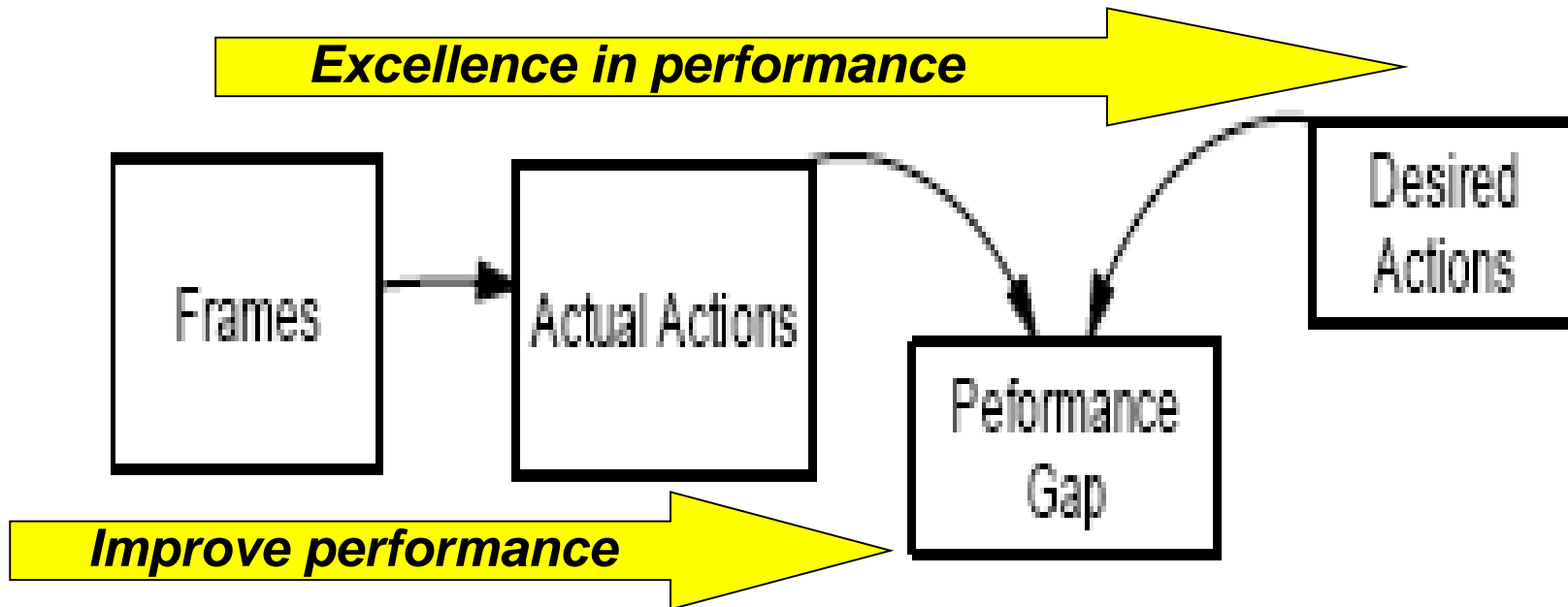
Team Outcome Simulation

- Focuses on the various issues that impact on positive team outcomes
- The most common program platform is Crisis Resource Management (CRM)
- This approach usually is contextualised to the clinical practice of the participants
- Due to the complexities involved the debrief process is supported best by video review
- This level of debriefing requires more structure and it is important that the Instructors or Facilitators involved are well versed in CRM

Important Pointers and Boundaries

- It is important to clarify the roles, rules and expectations before starting the debriefing session
- It can involve both self and group reflection
- There should be strong linkage between identified issues, clinical experiences and CRM principles and actions
- It requires a level of positive facilitation
- It is important to allow enough time to cover, reflect on and resolve issue outcomes

Performance Gap



Debriefing Models and Approaches

- Pendleton
- Chronological review
- Simulation-based assessment
- Interactive feedback
- Calgary-Cambridge Observation Guide
- SET-GO
- Advocacy Enquiry
- Objective Structured Assessment of Debriefing (OSAD)
- Plus/Delta
- Etc....

Pendleton

- Briefly clarify any matters of fact
- The learner in question goes first
- Good points first
- Recommendations not criticisms
- Ask learner how they felt
- Ask learner what went well and why
- Instructor/facilitator states what went well and why
- Ask learner what could be done better and how
- Instructor/facilitator states what could be improved and how
- Summarize strengths and up to three things to concentrate on

Chronological review

- Learner talks through the experience from beginning to end
- Origins in psychological debriefing (Critical Incidents)
[CISM: Mitchell]
- Crisis Resource Management in simulations

Scenario-based Assessments

- Preparation for feedback
- Learner-focused
- Set in broader context of trainee's learning and clinical experience

Kneebone & Nestel, 2005

Preparing for Feedback

- What experience do you have with this procedure?
- How are you feeling? Confidence?
- How competent do you think you are?
- What are the most likely challenges?
- How do you think you will deal with them?
- Have you conducted any similar procedures?
- Are there skills in this procedure that you use in others?
- What did you do well the last time you did this?
- Were there any particular difficulties?
- What are you hoping to learn during this exercise?
- Is there anything in particular you would like me to observe?

Learner-led Feedback

- How did you feel?
- Do you think those feelings influenced your performance?
How?
- How do you think the procedure went?
- Before you started, you identified things that worked well last time...How did those things go this time? (And did not go well)
- You said you wanted to focus on ... How do you think you did?
- You asked me to observe ...
- Can you summarize the things that worked well?
 - And the things for development?
 - How are you going to develop these skills

Interactive Feedback

Mini CEX (Clinical Evaluation Exercise)

- Promote learner reaction
- Self-assessment
- Recommendations
- Action plans

Calgary-Cambridge Observation Guide

- Start with the learner's agenda
- Always look at the outcome you are trying to achieve
- Encourage self-assessment and self problem-solving
- Groups – involve everyone on problem-solving
- Provide balanced feedback
- Make offers and suggestions
- Rehearse suggestions
- Be well intentioned, valuing and supportive

Kurtz et al, 1996

SET- GO

S: what I Saw

E: what Else did you see

T: what do you Think

G: can we clarify what Goal we'd like to achieve

O: any Offers of how we should get there

Advocacy Inquiry

- Provide feedback describing the gap
- Investigate the basis for the gap by exploring the frames and emotions contributing to the current performance level
- Help close the performance gap through discussion or targeted instruction about principles and skills relevant to performance

OSAD

Objective Structured Assessment of Debriefing

- Surgical context
- Literature, Expert consensus, Surgical simulations
- Categories:
 - Approach
 - Environment
 - Engagement
 - Reaction
 - Reflection
 - Analysis
 - Diagnosis
 - Application

Plus Delta

TOPIC: LEADERSHIP RETREAT



-
- + quality of speakers
 - + interactive exercises
 - + big objectives were accomplished
 - + opportunity for Q/As were ample



-
- Δ make break-outs cross-functional
 - Δ go offsite for lunch
 - Δ look into SlideRocket, Ignite or Prezi for presentations

Debriefing Processes

- Vent
- Acknowledge emotions
- What happened (phases)
- What was done well
- What could have been better (at each phase)
- Relevance to experience
- What has been learned
- Transfer to work settings
- Revisit emotions

Challenges

- Not engaging (I hate simulations)
- The manikin is unrealistic
- The environment is unrealistic/unfamiliar
- I would do _____ in real life

<crying>

Real incidents

Overstressed

Peer/self/facilitator pressure/expectations

Jolly B, Nestel D, Sprick C, Module C2: Training simulation educators, The NHET-Sim Program (2012), www.nhet-sim.edu.au

Time for Reflection ...

