

Teaching Tip # 3 – Setting Expectations for the Learner (s)
(Includes junior residents or students)
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✚ **Why do we need to set expectations?**

- To save time and energy by preventing mistakes
- To tailor the rotation to different learners' particular needs
- To provide a framework for giving feedback and evaluating learner

✚ **4 Steps in Setting Expectations**

- Orient learner; assess learner needs
- Clarify expectations of performance
- Review rotation objectives
- Close the loop: provide feedback about whether expectations and objectives met

✚ **Step 1: Orient Learner**

- Introduction of learner to the team members
- Overview of rotation
- Assess Learner Needs
 - Prior rotations completed
 - Other complementary experiences
 - Interests and what do they want to “get from this rotation”
 - Inventory of clinical skills learned thus far

✚ **Step 2: Clarify Expectations**

- Program Expectations (course curriculum and the evaluation form)
 - Learner Expectations (includes areas to work on: clinical knowledge, skills, attitudes as well as grade sought for the rotation)
- Resident Expectations
 - Daily routine – time for rounds
 - Notes before rounds or after
 - Timing of lectures / faculty teaching sessions
 - Team interactions
 - When a problem arises who to contact
 - Unique learning opportunities on this rotation

✚ **Step 3: Rotation Objectives (will come from Residency or Clerkship Director)**

- Review on the first day with the students

✚ **Step 4: Follow Through**

- Give feedback to learner: Is the learner meeting expectations?
- Consider “mid-rotation formative evaluation”
- Mandatory exit interview: discuss how the grade reflects expectations and objectives