

## Objectives

- Describe the role of an advisor with respect to individual trainees
- Describe institution-specific goals and expectations for resident advisors
- Identify necessary components for an advisor toolkit.

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## Duke Educational Innovation Project (EIP)

- Launched July 2006
- Fundamental Principles:
  - Patient-Centric Care
  - Individualized Learning
- Programs:
  - Practice partnerships
  - Inpatient consult service
  - Advising & Individualized Learning Plan (ILP)



## Individualized Learning

- Specialty Preference / Generalist Training
- Ambulatory / Hospital Based Medicine
- Clinician-Educator Pathway
- Generalist / Primary Care
- Subspecialty Clinical Care
- Hospital-Based Medicine
- Basic Science Research
- Clinical or Health Services Research
- Medical Economics / Health Policy



## The Advising Challenge

- Time
- Focus- which path do residents choose? When?
- Experience as an advisor
- Resources

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## Duke Advisor Committee Goals 2006-2007

- Goal 1. Gain a clear understanding of the role of the departmental advisor—including responsibilities, relationships, and resource needs.
- Goal 2. Develop a process by which advisors assist residents in the development and maintenance of individualized plans.
- Goal 3. Build a toolbox of resources necessary to advise residents as part of this process.

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## Mentor or Advisor Exercise



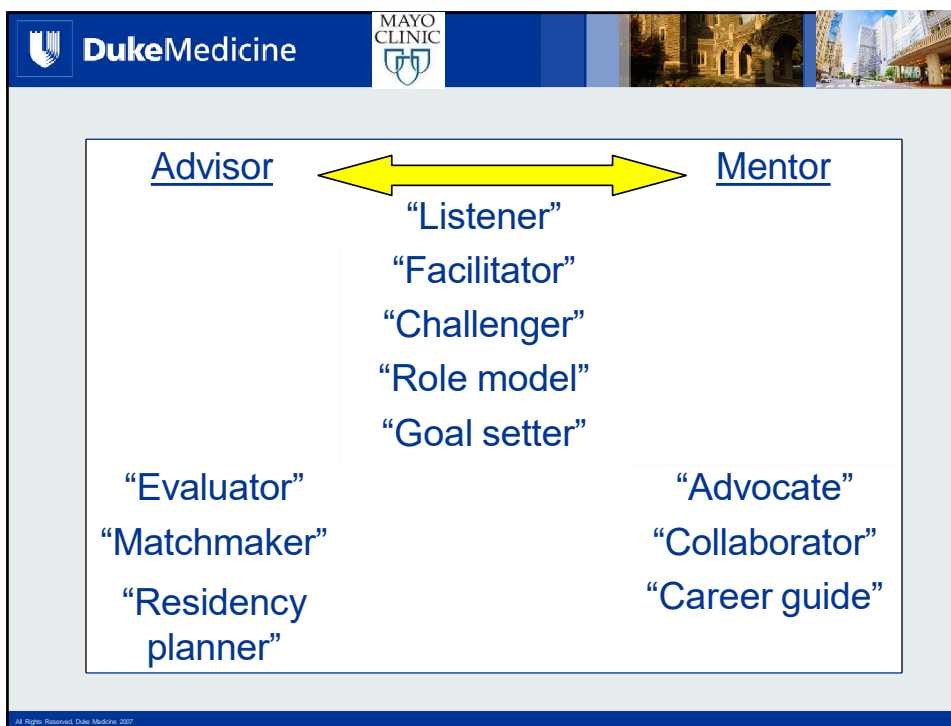
**What is the difference between a mentor and an advisor?**



## Duke/Mayo Definition



- Mentor:
- Advisor:
- Key Differences:



**A Good Advisor..... (from our workshop)**

- Able to tell when someone is in trouble.
- Ability to discuss what the resident really needs.
- Says, "This is what you really need" as opposed to "Here is what I do"
- Good at giving feedback either good or bad....and [can] come up with a plan to improve.

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## What do our residents say they need?




- Provide an honest assessment of where we stand as a resident and show improvement measures
- Help us know what is out there—outside of Duke
- Keep us informed of timelines—what needs to be done when (board dates, licenses)



## Role Definition Exercise


- What is the advisor's role?
- What is the resident's role in advising?

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Activity	Items Needed	Advisor Responsibility	Resident Responsibility	Administrative Tasks
<b>Formal meeting with resident</b> (twice a year)	<ul style="list-style-type: none"> <li>•Calendar</li> <li>•ILP</li> <li>•Portfolio</li> <li>•GME requirements checklist</li> </ul>	<ul style="list-style-type: none"> <li>•Review portfolio</li> <li>•Facilitate discussion</li> <li>•Write meeting notes</li> </ul>	<ul style="list-style-type: none"> <li>•Choose a meeting time</li> <li>•Review and complete all necessary forms/lists prior to meeting</li> <li>•Discuss your progress</li> </ul>	<ul style="list-style-type: none"> <li>•Prepare and pull resident's portfolio</li> <li>•Monitor resident completion and submission of documents</li> </ul>
<b>Development and maintenance of the ILP</b> (Individualized Learning Plan)	ILP	<ul style="list-style-type: none"> <li>•Review plan and provide feedback and input when appropriate</li> </ul>	<ul style="list-style-type: none"> <li>•Complete/update ILP</li> <li>•Send a copy to your advisor</li> </ul>	<ul style="list-style-type: none"> <li>•Enter a copy in the portfolio</li> </ul>
<b>Provide personal and career guidance</b>	<ul style="list-style-type: none"> <li>•Resource toolbox</li> <li>•List of fellowship contact persons</li> <li>•Resident's CV</li> </ul>	<ul style="list-style-type: none"> <li>•Check-in regarding life circumstances</li> <li>•Review toolbox to know what resources are available to residents</li> <li>•Discuss career plans</li> </ul>	<ul style="list-style-type: none"> <li>•Discuss your needs</li> <li>•Consider career plans</li> </ul>	<ul style="list-style-type: none"> <li>•Organize and update resources toolbox and fellowship contact persons</li> </ul>


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## Challenge & Barrier Brainstorm

**What are your challenges and barriers to advising?**



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## Resources for Advisors




What tools do advisors need to be successful?

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## The Initial Duke Advisor Toolkit

MedEdAdvising on 'midway' (W:)

File Edit View Favorites Tools Help

Back Forward Up


Search Folders

Address W:\

File and Folder Tasks

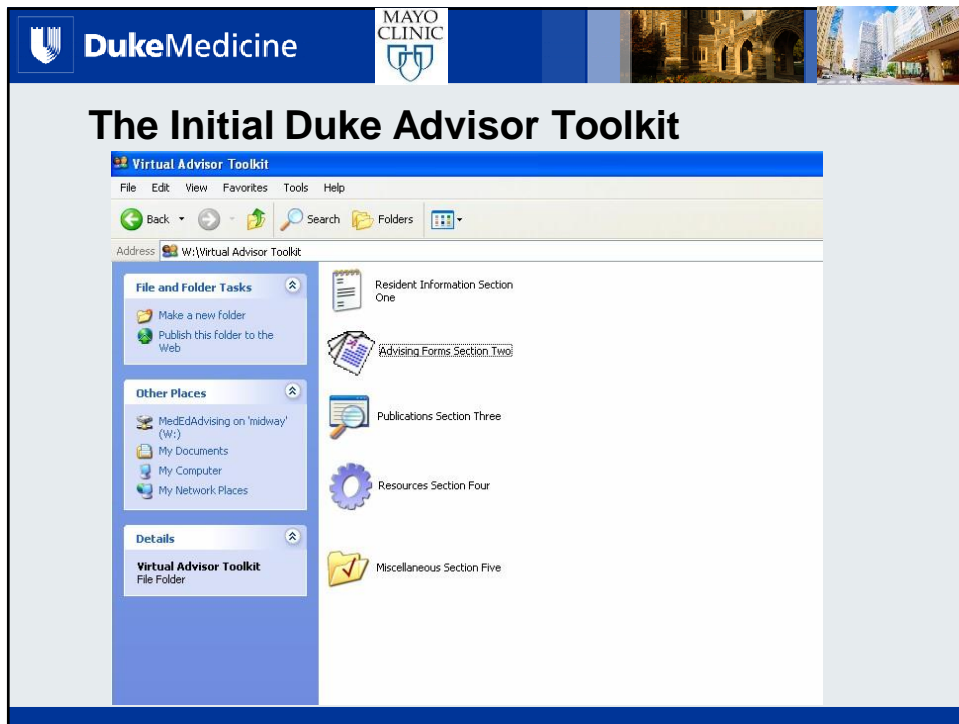
Make a new folder

Publish this folder to the

 Virtual Advisor Toolkit

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## Advisor Development Path

- **Advisors' Retreat**
  - Team building
  - Policy update
  - Feedback
  - Crisis management
- **Monthly "Debriefings"**
  - Identify and build resources
  - Problem solve
- **Semi-annual Lectureships**
  - Enhance knowledge and skills
  - Increase profile
- **Advisor Scholarships**
  - Presentations
  - Travel to regional or national meetings
  - Publications

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## Lessons Learned & Next Steps

- Takes time, resources and dedication
- Requires team-building and growth among faculty
- Seek resident "voice"
- Collect data to demonstrate change

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**Thank you for your time.**  
**Questions?**



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