**TEMPLATE INSTRUCTIONS (Remove these instructions before publishing)**

YELLOW HIGHLIGHTS: Update with your program’s information and remove the highlights.

RED TEXT: Notes for the program only. Meant to provide context or instruction. Remove anything in red text prior to publishing.

BLUE TEXT: Reference to applicable accreditation standards, for your information. Remove anything in blue text prior to publishing.

**Requirement 3.4.2:** There is a mechanism in place to engage residents in regular discussions for review of their performance and progression.

Indicator 3.4.2.1: Residents receive regular, timely, meaningful, in-person feedback on their performance.

Indicator 3.4.2.2: The program director and/or an appropriate delegate meet(s) regularly with residents to discuss and review their performance and progress.

Indicator 3.4.2.3: There is appropriate documentation of residents’ progress toward the attainment of competencies, which is available to the residents in a timely manner.

Indicator 3.4.2.4: Residents are aware of the processes for assessment and decisions around promotion and completion of training.

Indicator 3.4.2.5: The residency program fosters an environment where formative feedback is actively used by residents to guide their learning.

Indicator 3.4.2.6: Residents and teachers have shared responsibility for recording residents’ learning and achievement of competencies and/or objectives for their discipline at each level or stage of training.

**Requirement 6.1.2:** Support services are available to facilitate resident achievement of success.

Indicator 6.1.2.1: The residency program provides formal, timely career planning and counseling to residents throughout their progress through the residency program.

*Programs may choose to use Academic Advisors (AA); however this is not mandatory for CBD. Programs may choose to have coaches and/or mentors for their residents in addition to, or in lieu of, an AA.*

*This document is designed to serve as a guideline for programs with Academic Advisors, and to be helpful in creating a program-specific role description. It is not prescriptive. Please edit and modify as required for your program and Competence Committee processes.*

**Academic Advisor Role Description**

**Approved:** DATE

**Date of Next Scheduled Review:** DATE (review at least every three years)

**Preamble:**

Competence by Design (CBD) or Triple C Academic Advisors are faculty members who are responsible for guiding and supporting residents with their progression through resident training.

Programs may choose to use Academic Advisors (AA).

**Qualifications:**

The AA must be certified by the Royal College (RC) or College of Family Physicians of Canada (CFPC) or equivalent international qualification.

They should have demonstrated an interest in postgraduate education.

The AA should have strong organizational and communications skills, and a foundational knowledge of CBD/Triple C principles.

The AA will be required to access Elentra and other electronic portfolios.

**Accountabilities:**

The AA is accountable to the program director. The AA is expected to report any significant difficulties to the program director.

Confidentiality and protection of resident assessment and professional interests must be maintained. Some programs may require an AA to sign a confidentiality agreement.

For some programs the AA may serve as members of the CC or they may be invited to CC meetings to present reports on residents’ progress, in particular for learners in difficulty.

The program should decide if the AA will recuse themselves from CC decision making about resident progress for residents they represent.

**Appointment:**

The AA will be selected by the program director, or the CBD lead or divisional/department Chair. (This is program dependent – each program should decide on this process).

The term is normally x number of years with x renewable terms possible. Ideally the term is long enough to provide consistent longitudinal support to a resident through several years, or the entirety of their training (e.g. 3-5 years).

If the program is providing protected time or renumeration for this role, this should be clearly identified in this section.

The AA will require 2 hours every two to six months for each resident they are assigned (1 hour for preparation and 1 hour for the resident meeting and completion of summary documentation). Learners in difficulty may require additional support.

**Responsibilities**

The AA will be assigned x number of residents (e.g. 1-3).

Some programs may have the AA provide a summary of resident progress to the CC, other programs may prefer to have AA be at arm’s length from the CC (this approach has the AA in a more supportive or mentor role).

Note: responsibilities will vary from program to program, but may include:

1. At the beginning of the resident’s program, schedule an initial introductory/welcome meeting to:
   * Review the role of the AA
   * Get to know the resident
   * Discuss career aspirations
   * Ensure resident is aware of program and University supports available to them
   * Engage in personal reflection
   * Obtain contact information (e.g. email, phone number)
2. Review resident portfolios and meet with the resident every x months, and a minimum of at least once per stage of training (RCPSC). Resident meetings with the AA should occur prior to any CC meeting in which the resident progression will be discussed. Each meeting should be documented and added to the resident file. A copy of the documentation should also be shared with the resident.
3. Review the resident portfolio and assessments with the resident. Help the resident reflect on the feedback they received to ensure they understand it. Each meeting should be documented and added to the resident file. A copy of the documentation should also be shared with the resident.
4. Co-create learning plans or goals with the resident that document areas of strength and areas for improvement. Identify any priority areas of knowledge, skills or competencies the resident can work to improve upon.
5. Provide coaching for performance change.
6. Participate in the process of developing enhanced learning plans, remediation or probation plans for residents in difficulty.
7. Generate written reports on resident progress and recommendations for promotion for the CC. The report should use the template provided by the program.

Agenda items that may be included for the resident and AA meetings:

* Review of the CBD map and rotations
* Review of goals, objectives and competencies of current and upcoming rotations
  + ‘Things that are going well’, ‘Goals that have been met’,
  + ‘Future goals’, ‘Actions to meet future goals’ and
  + ‘Things that are not going as well…’
* EPA review
* Assessment review (ITERs, exam results, self-reflection, etc.) of portfolio
* Provide guidance for resident on EPA completion on upcoming rotations, and how best to approach any gaps in EPA assessments
* Reflect on the ‘big picture’ with major themes, strengths and weaknesses identified
* Development and review of learning plans and progress
* Ensuring resident is aware of resources for support, as applicable (e.g. [Learner Experience](https://www.schulich.uwo.ca/learner_experience/)).