LEARNING PLANS // what, why, and how to do them well…

What is it?

- A *learning plan* (also known as a *learning contract* or *learning agreement*) is a document that specifies what goals the learner will be working to achieve during the learning event.

Why are they important?

- Learning contracts offer the potential to promote deep learning and are especially well suited to practical and collaborative work. (Marton)
- Residents indicate that learning plans help them to identify and fill knowledge-base gaps, enhance their literature searching and critical appraisal skills, and promote reflection on their learning outcomes. (Smith)
- A learning contract puts responsibility on the learner. The process aims to develop the skills and initiative trainees need to meet their learning needs long after their training has finished. (Anderson)

5 Tips to make them effective…

Tip	Rationale
1. **Involve learner in co-creating the plan**	➢ *Increases the number of minds working on the plan* ➢ *Enhances learner buy-in by incorporating learner needs, interests, and solutions*
2. **Develop goals that merge key competencies and location-specific learning opportunities**	➢ *Helps learner develop and demonstrate competence in all required areas* ➢ *Leverages unique learning opportunities available at your site*
3. **Write SMART goals/outcomes** (specific, measurable, achievable, relevant, time-bound)	➢ *Specifies exactly what is expected of learner* ➢ *Allows for more accurate assessment*
4. **Put it in writing**	➢ *Clarifies expectations for all involved* ➢ *Supports future educational interventions, if needed*
5. **Check in and assess progress**	➢ *Review with learner before end of learning event to determine if learner is "on course" for goal completion* ➢ *Adjust plan, as warranted* ➢ *Provide goal-specific feedback on final assessment*

References:

- Anderson, G. et al. 1996. *Learning Contracts: a practical guide*. Kogan Page, London.
- Marton, F. et al. 1984. *The Experience of Learning.* Scottish Academic Press, Edinburgh.
- Smith, S. et al. 2011. Learning plans at the point of care. *J Grad Med Educ* 3(3): 425-428.

SAMPLE LEARNING PLAN

Roberto is a new family practice resident who will be working with you for the next 8 weeks. You schedule a meeting with Roberto to get to know him and to help orient him to your practice. During the conversation, you learn some useful things about Roberto that will help you both create a learning plan that will target his learning needs.

Key takeaways for you include…

→ Roberto did a fair amount of acute care during his 4th year undergraduate electives but seems to have had very little exposure to chronic disease management
→ Roberto maintains that he is quite comfortable with prenatals and infants but reveals that hasn't yet had any exposure to deliveries
→ In referencing his own grandmother's declining health, Roberto asked you about what community supports for seniors were available in your area
→ Roberto mentioned that he has enjoyed several teaching roles in the past (camp counselor, teaching assistant) and looks forward to being a preceptor, himself, one day.

Your Tasks:

1. Write 2-3 strategic **learning goals** that merge Roberto's learning needs and interests, the learning opportunities available at your site, and UBC Family Medicine's Curriculum Objectives.
    *   Write your goals in concrete, action-oriented language (eg. *Assess cognitive function of one patient using the Mini Mental State Examination*)
    *   If possible, target different Domains of Care, clinical settings (in hospital, in office, in emergency, at home), care responsibilities (prevention and health promotion, diagnosis and management, supportive care and palliation, etc) and different CanMEDS-FM roles

2. Think of ways you could **support** Roberto to achieve his learning goals.

3. Think of ways you could **assess** whether Roberto has achieved his learning goals.

Sample Learning Plan for Roberto…

Learning Goal	Ways to Support Achievement	Ways to Assess Achievement
1. Given a patient diagnosed with diabetes (or other chronic disease), treat and modify treatment according to disease status	o Advise MOA to schedule Roberto with diabetic patients o Roberto to read up on best evidence-based practices in Diabetes treatment	o Direct observation o Completion of field note
2. Describe referral, support network, and community resources options for seniors with declining mental health	o Roberto to research independently o Schedule meeting with community Social Worker	o Roberto to deliver 5-minute oral presentation o Completion of field note
3. Deliver a learning session to clinic MDs/staff on topic of their choice.	o Book conference room and video camera o Schedule planning conference (Roberto, preceptor) 1 week before learning session date	o Video review of learning session o Completion of field note