

Checklist for the planning stage

1. Build trust with your trainee on an ongoing basis to facilitate the evaluation process.
2. Demonstrate openness.
3. Discuss your respective expectations; sign the expectations document.
4. Have your trainee write personal goals using the SMART and ABCDE models.
5. If not already done by the setting, write academic goals to unpack the skills.
6. 6. If the documents include academic goals, read them and make sure they are written in a way that is measurable. If not, add specifics.
7. If the documents are based on a competency-based approach, read the criteria and indicators carefully. Make sure that they are written in a way that is measurable.
8. Meet with your trainee to discuss the documents and establish a learning contract so that all aspects are clearly understood by everyone.