CaRMS self-identification questionnaire

Program orientation

LAND ACKNOWLEDGMENT

I acknowledge Canada as the land of the First Nations, Inuit, and Métis.

I acknowledge that CaRMS' office, located in Ottawa, stands on the traditional territory of the Anishinaabe Algonquin People.

I pay homage to the Indigenous peoples, past, present, and future, from all Nations across Canada, who contribute to the strength of this country. We are grateful for the opportunity to live, work, and learn in this place.

Objectives for today

The CaRMS Self-identification questionnaire (CSIQ)

Review the purpose and work-to-date

2022 R-1 Match use

Review the form and the test rollout in 2022 R-1 Match

Considerations re: the selection process

Discuss the broader program rollout strategy and program considerations for implementation

EDI and resident selection

"Universities are expected to demonstrate social responsibility and accountability in fulfilling a mandate to provide a balanced graduate pool of physicians. The applicant pool has expanded and become more diverse with applicants from around the world, with differing experiences. Fundamental issues of equity, reliability, validity, and feasibility are the focus of recent literature reviews and original research."

EDI and resident selection

Key recommendations

5. Selection criteria and processes should **promote diversity** of the resident body (e.g. race, gender, sexual orientation, religion, family status), **be free of inappropriate bias**, and respect the obligation to provide for reasonable accommodations needs, where appropriate.

Postgraduate Medical Education
UNIVERSITY OF TORONTO

2013

BEST PRACTICES IN APPLICATIONS & SELECTION

FINAL REPORT (DRAFT MAY 2013)

PREPARED BY THE BEST PRACTICES IN APPLICATIONS & SELECTION WORKING GROUP (BPAS):

Glen Bandiera (Chair), Caroline Abrahams, Amanda Cipolla, Naheed Dosani, Susan Edwards, Joel Fish, Jeannette Goguen, Maureen Gottesman, Mark Hanson, Karl Iglar, Roaa Jamjoom, Aaron Lo, David McKnight, Leslie Nickell, Mariela Ruetalo, Kevin Shore, Brad Sinclair, Derek Tsang, Zoe Unger

EDI and resident selection

Key recommendations

13. Diversity of residents across PGME programs must be pursued and measured.

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CaRMS' strategic objectives

- Gather diversity data that can inform medical education on the current state and future progress regarding application, selection and matching through an EDI lens

- Support programs with a product that can help them introduce a diversity consideration to their selection process

The selection process and the CSIQ

- Many programs are already asking for these types of information, and there is no requirement to use the CSIQ

- This questionnaire was developed to offer:
  - An opportunity for programs who don't have a current collection mechanism in place
  - A common collection and distribution experience, leveraging CaRMS tools; and
  - Program support, with orientation and considerations to help shape their change-management planning when introducing the form to their process
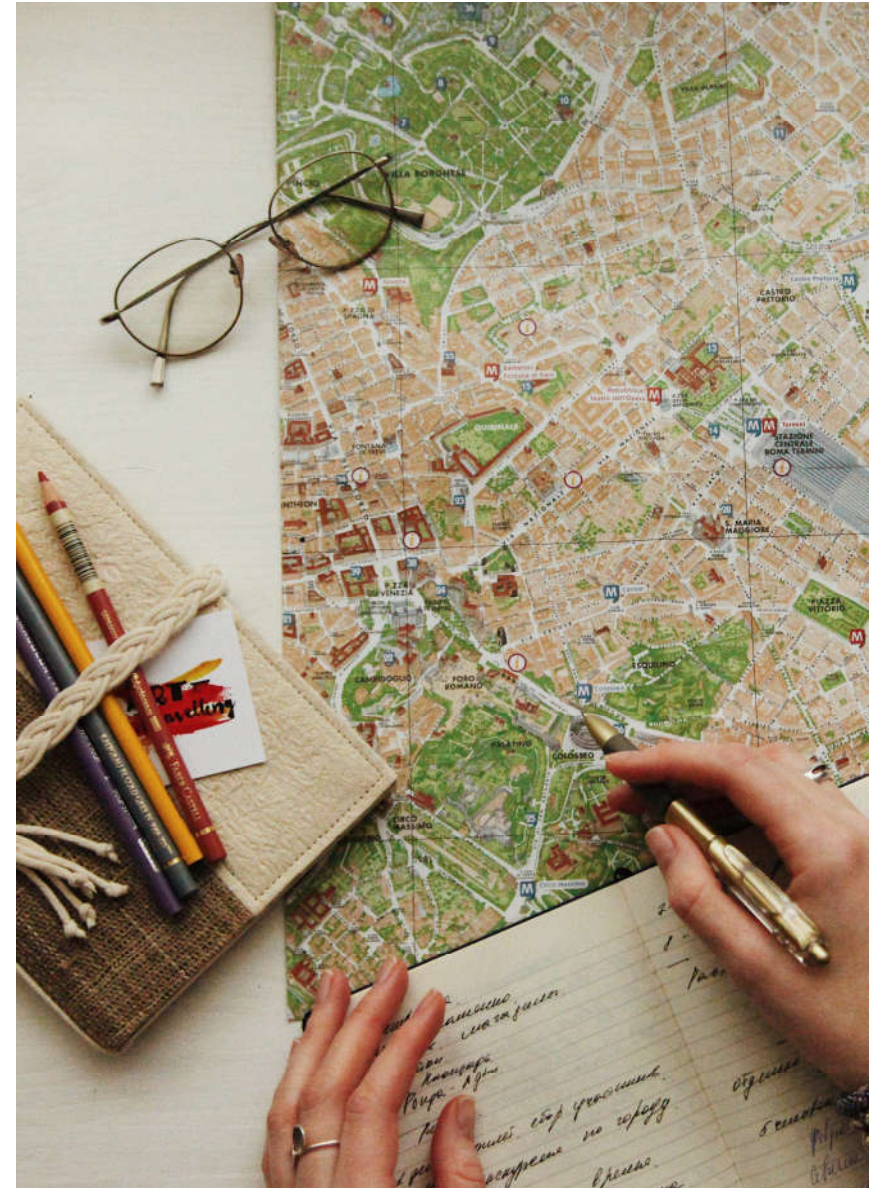
Equal   Equitable   Ideal

Developing the CSIQ

- Great encouragement and support of this initiative from learner group leadership

- Have been working closely with Dr. Ian Epstein, IM program director from Dalhousie University, for ~16 months

- Drafted and iterated several versions of the CSIQ for test use in the 2022 R-1 Match

- The questionnaire is designed for all applicants to complete, to fulfill the census data objective, and all applicants are provided with a copy of their completed questionnaire for optional inclusion in their application package

Consultation throughout the development process

- **Postgraduate deans:** confirmed support of the objectives; provided input towards the development of the standards for using the form data in the selection process

- **Canadian Center for Diversity and Inclusion:** reviewed the form and assisted in language and additional options for consideration

- **Learner leadership:** reviewed the questionnaire, provided feedback, asked questions, and have shown support for the questionnaire's dual purpose

- **UG/SA leadership:** reviewed the questionnaire; sought clarity about the program-level usage and protection of the applicant-provided information
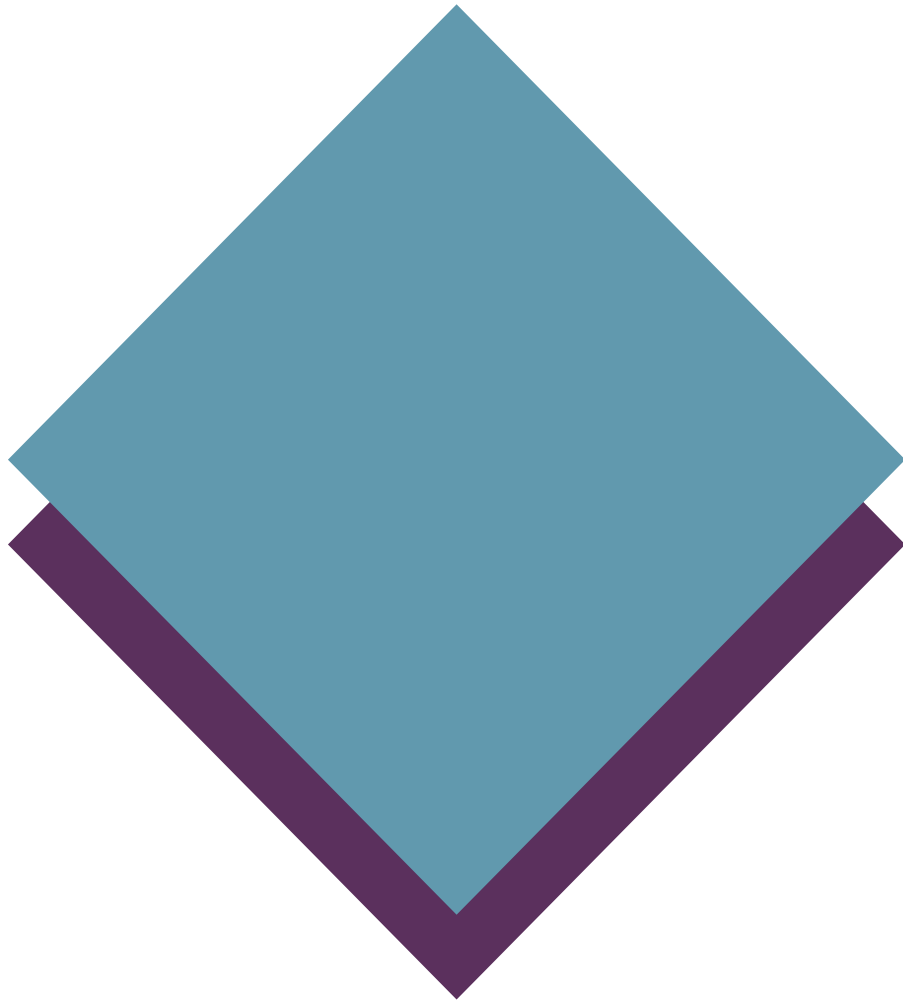
Let's look at the CSIQ

Test group usage of the CSIQ in 2022 R-1 Match

- 8 programs from Dal participated in the 2022 Match year test, with significant support from their PGME office and Dean
  - IM, Rad onc., Neuro, Derm, Neuro SX, OBGYN, PMR, Anaes

- The PGME office was involved throughout the process, to help create local guidelines and expectations:
  - Training
  - Usage
  - Storage

- The programs used common messaging for their program descriptions, but selection process changes were left up to individual programs

Common usage strategies by test programs

- Though not all programs used the same strategies, the following were used:
- All who submitted an SIQ granted an interview
- SIQ consideration reserved for after rank list wa screated
- SIQ used to move a candidate up a rank list
  - Within reason, and amongst commonly considered applicants

NOTE: there are no "best practices" yet. The decision about where to use the information in the selection process, as well as how, is something you and your program committees should create together.

Test group evaluations

- Dalhousie circulated a survey to test programs:
  - 28 respondents
    - 18 committee members
    - 7 PDs
    - 1 committee chair
    - 1 program administrator
    - 1 resident

Test group evaluations

Before beginning, did you have any concerns about incorporating information from the CSIQ in the decision-making process?

- 71% indicated no concerns
- Concerns were primarily operationalization-based:
    - How to use the information
    - How to weigh the different categories within the CSIQ
    - How to best be fair and transparent about the process

Test group evaluations

How did committee members in your program respond to using the form?

- Most (15/25) indicated it was well-received
- 3 indicated neutral responses
- Of those who expressed hesitation (7/25) concerns focused on:
  - Fairness (how would identification within various groups be weighted; not submitted by all candidates)
  - Potential to disadvantage most suitable ("best") candidate
  - Potential to introduce bias, further complicated by inconsistent completion amongst candidates

Test group evaluations

What **went well or facilitated use** of the CSIQ in the decision-making process?

Most common responses:

- Having pre-determined and agreed upon guidelines for how the CSIQ would be used

- Preparation session before the process began (e.g., information sessions)

- Committee buy-in with open, honest discussions

carms

Test group evaluations

What advice would you offer another program considering the CSIQ for this coming Match cycle?

• Communicate the value of the form to applicants (used to advantage; never disadvantage; how exactly it is used by the individual program)

"Need to be clear to applicants that they are advantaged by filling out the form rather than 'will not be disadvantaged by filling out the form'"

• Don't let perfect stand in the way of good

"Another tool to help do the right thing."
"Despite the struggles I definitely still recommend it and I hope uptake will increase over the years…It will be a challenge but I think it is important and we will just keep getting better at using it as we get more experience."

Working group feedback

- CaRMS created a working group to assist us in developing our rollout plans for the CSIQ
  - Including membership from BMSA, IMSA, CAPD
- The working group has expressed that applicant confidence in programs using the form relies heavily on the programs' ability to showcase their commitment to:
  - Educating their review and interview teams
  - Communicating how the form will influence an applicant's consideration
  - Protecting applicant data
  - Evaluating their progress

Working group feedback

- Working group has also provided feedback on reporting considerations for the data

- CaRMS will be producing aggregate, anonymized intersectional data tables (similar to our annual R-1 data compilations) with an initial focus on application and interview offer activities

- CaRMS will be working with PGME deans committee to build the framework for localized data requirements

Program usage requirement and recommendations

- CaRMS requirement: Must attend a CaRMS-hosted orientation ✅

- If using the CSIQ, it should be listed for all streams i.e. CMG and IMG

- You, as program leadership, need to be adequately prepared to use the information provided via the questionnaire:
  - <mark>You have identified how the submission of the CSIQ will **benefit** the applicant and **where in the process** the benefit will be applied</mark>
  - You have provided appropriate training and instruction to review teams on how to handle the information provided in the CSIQ
  - You have developed the framework for evaluating your process, through a diversity lens
  - You have updated processes to ensure the secure destruction of the material, post-match

Program usage requirement and recommendations

- Can <u>only</u> be listed as "optional – will be reviewed"
  - This is a programmatic element in CaRMS Online

- Required: include language as to how the information provided by the applicant will be considered as part of the selection process
  - Text should focus on your program's principles of diversity and inclusion, rather than "We give 10 pts for A, but only 5 pts for B"

- Recommendation: the PGME office and programs interested in using the CSIQ develop:
  - local principles, including baseline standards for providing review team members with implicit bias training, as well as handling sensitive information
  - common language for program descriptions

Sample of text used by test programs in 2022 R-1 Match

Dalhousie is committed to fostering a collegial culture grounded in diversity and inclusiveness. The university encourages applications from Indigenous persons, persons with a disability, racialized persons, women, persons of a minority sexual orientation and/or gender identity, and all candidates who would contribute to the diversity of our community.
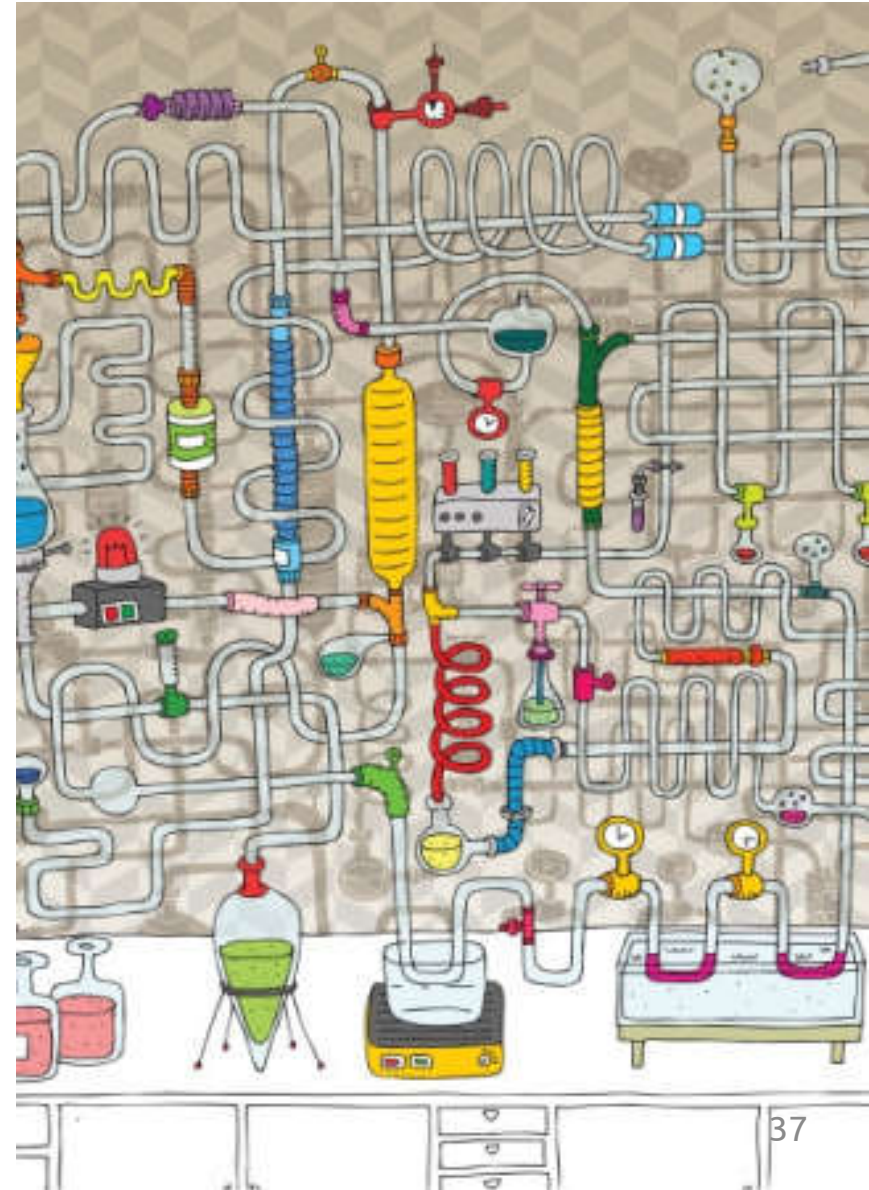
Candidates are not required to submit the CaRMS Self-identification questionnaire, but for those that do feel comfortable doing so the information received would only be used to advantage those who would contribute to the diversity of our community.

Any self-identification questionnaires received will be reviewed as part of our file review process and used as an aid for file reviewers in selecting a diverse group of candidates for interviews. Information received may also be used by the program to adjust final rankings, at the discretion of the selection committee, to address issues of program priority and diversity.

Path to implementation

- Connect with your PGME office to discuss local implementation strategy
- Add document to program description
- Create text for how the information will be used as part of the selection process
- Educate your review team about the form and the expectations for usage and maintaining confidentiality of the information

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Questions?