

Pharmacy residency preceptor development: a baseline needs assessment

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Marshfield Clinic



Background



- 2007-2008:
 - Inaugural year of pharmacy residency
- Preceptors must¹
 - be evaluated on desire to teach
 - be evaluated on aptitude for teaching
 - have opportunity to enhance teaching skills

¹ American Society of Health-System Pharmacists (ASHP) Accreditation Standards

Marshfield Clinic Pharmacies

- Clinical pharmacy services department
- Managed Care pharmacy practice
 - Security Health Plan of Wisconsin
- Outpatient pharmacies
- Sterile products pharmacies
- Investigational Drug Program
- Family Health Center Pharmacy

Our Team: Residency Preceptors



Not pictured: Pat Burt, Jen Proudfit, Janet Schoenherr

Purpose

- Conduct a baseline needs assessment of Marshfield Clinic pharmacy residency preceptors
- Implement a faculty development program for preceptors

Methods

- Created Needs Assessment questionnaire
- Sent electronic survey to preceptors (n=13)
- Requested response in two weeks

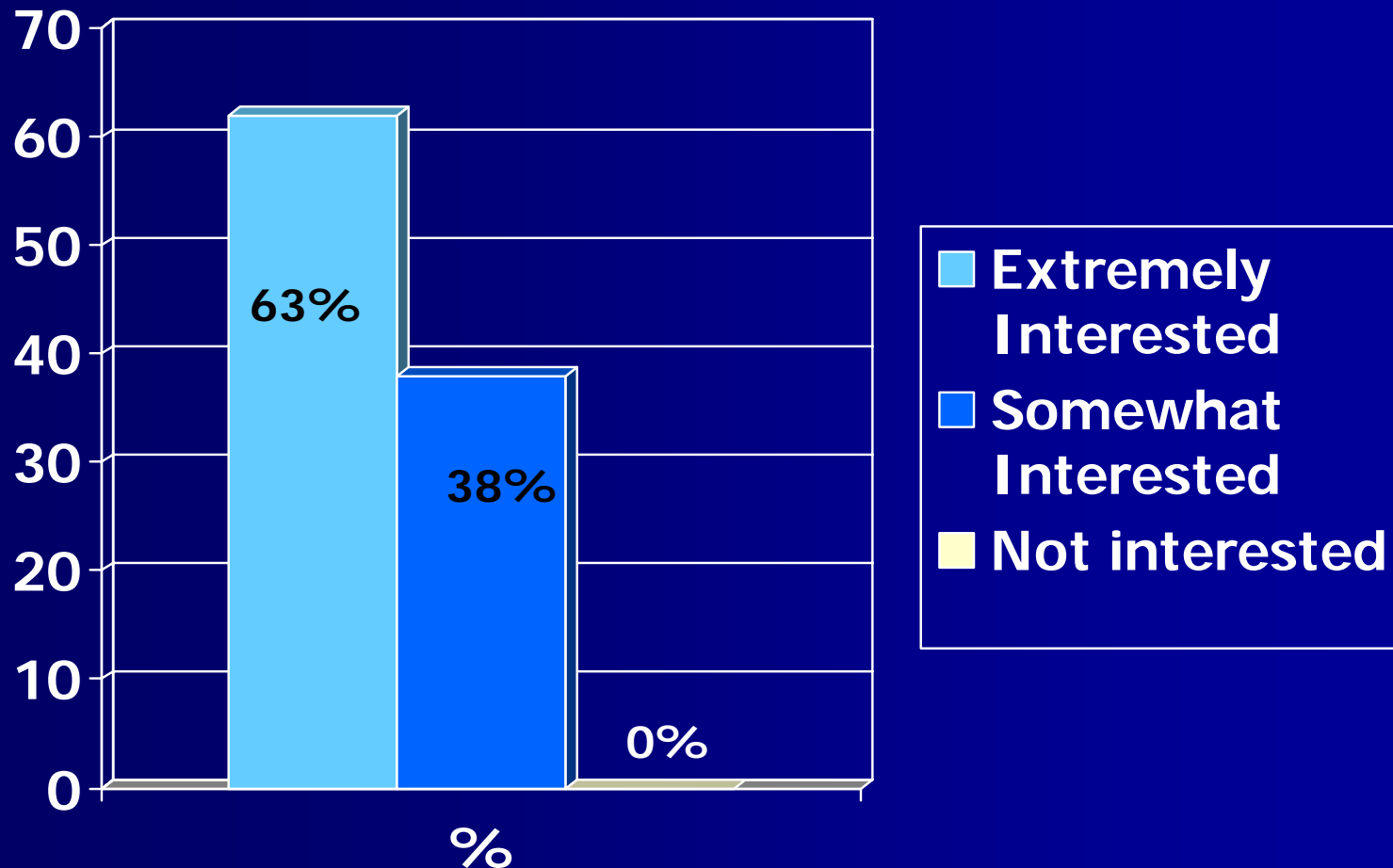
Results

- 100% response rate (13 of 13)

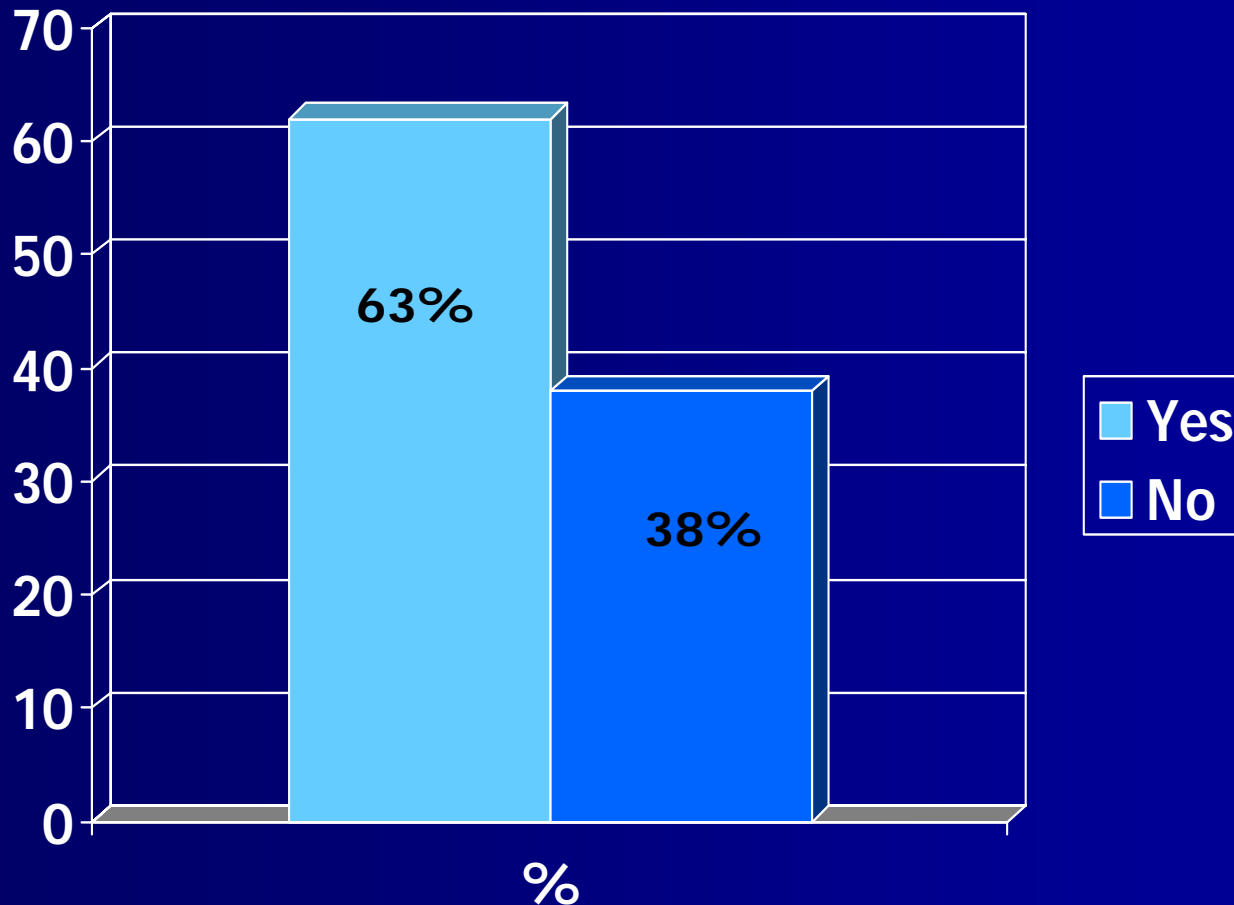
Past experiences teaching pharmacy students/residents?

- n=11 (85%)
 - Mentoring/teaching students
 - Facilitating learning activities that students/residents participate in
- n=3 (23%)
 - Precepting pharmacy residents

Level of interest in teaching pharmacy residents?



Participation in training programs focused on teaching?



Current level of expertise and ability in each area

Topic	Median	Range (1-5)
Teaching in small groups	4	(3-4)
Giving Constructive Feedback	3	(3-4)
Setting Expectations with Learners	3	(2-4)
Assessing Learner needs	3	(2-4)
Curriculum Development	3	(2-4)
Teaching Large Groups	3	(2-4)
Using Technology in Teaching	3	(2-4)
Assessing Learning Styles	3	(1-4)
Identifying Impaired Learners	2	(1-3)

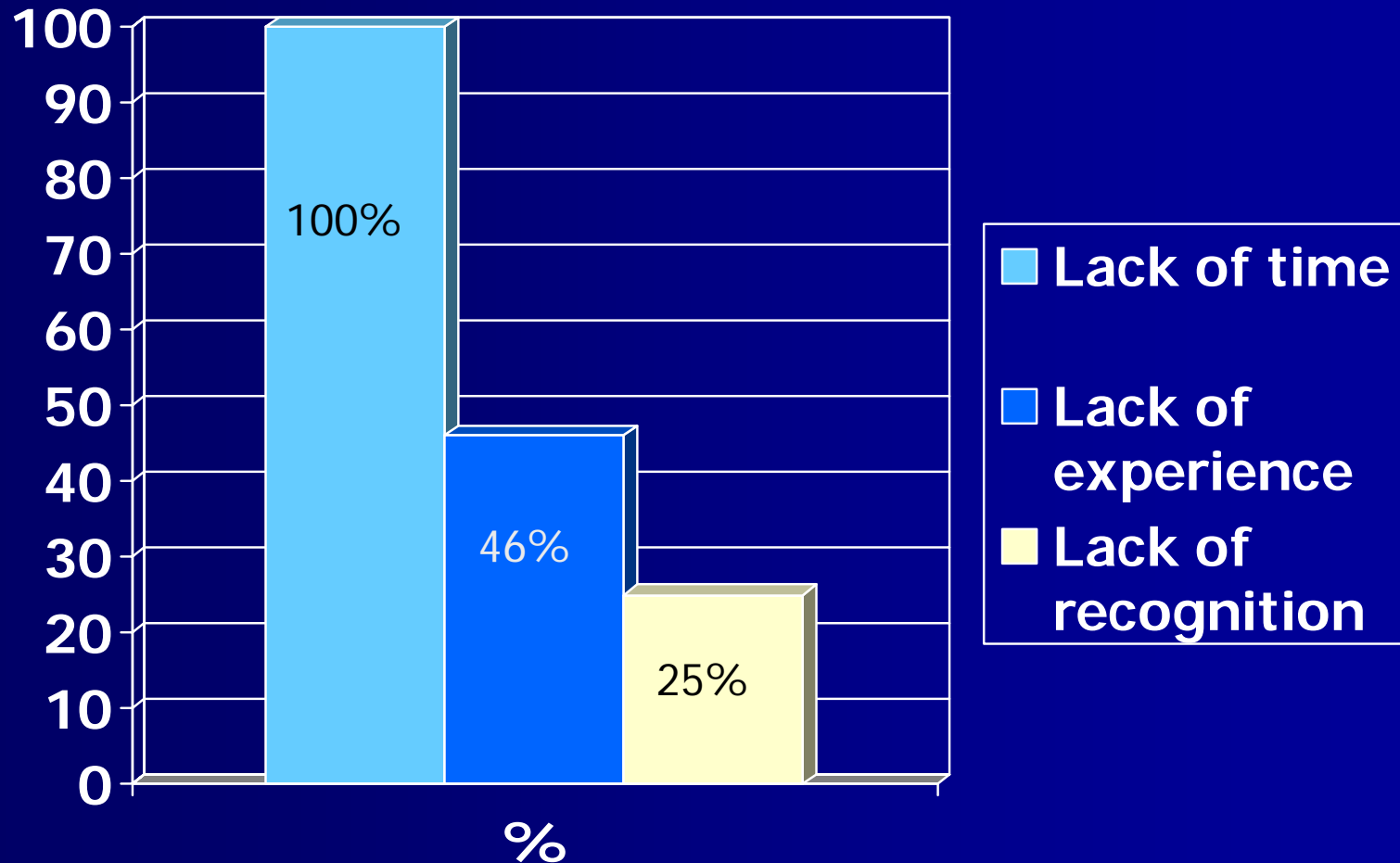
Scale: 1: Low, Need much development; 3: Medium, Good but could still improve; 5: Mastery, Could teach others

Level of Interest in 'Teaching skills enhancement' opportunities

Topic	Median	Range (1-5)
Quarterly seminar/dinner potentially with outside speaker	4	(2-5)
Completing computer based training (CBT) focused on teaching	4	(1-5)
Reading teaching related materials	3	(2-5)
UW-Health Education Journal Club	3	(1-5)
Participating in UW-Madison MEDAL teaching program or similar program	3	(1-5)

Scale: 1: Least interested; 5=most interested

What prevents preceptors from performing at our best?



Next steps:

Preceptor Development Plan

- Preceptor Guide
- Annual participation requirement
- Biannual quality improvement meetings

Preceptor Guide



Marshfield Clinic Pharmacy Residency Preceptor Guide

Postgraduate Year One (PGY1)

Program Purpose

- Prepare the resident for a clinical pharmacist and/or leadership role in an integrated healthcare delivery system, adjunct faculty position, or PGY2 training in area of choice

Program Educational Outcomes

- Manage and improve the medication-use process.
- Provide evidence-based, patient-centered medication therapy management with interdisciplinary teams.
- Exercise leadership and practice management skills.
- Demonstrate sound management/financial skills.
- Apply research and practice-based education training.
- Utilize evidence-based practice.

 MARSHFIELD CLINIC.

Outlining Resident to Each Learning Experience

- Create a learning experience log (e.g., resident should have a binder of information describing it. There are some ideas of what to include in the binder)
 - Date of Learning Experience
 - Residency rotation during the learning experience and objectives that will be taught (1) and/or evaluated (2)
 - List of potential topic discussions
 - Required readings

Orientation should occur at the beginning of the learning experience, including the following topics:

- Introduction (e.g., preceptor, other staff)
- Check with assigned objectives for learning experience (e.g., activities that will support each goal, daily requirements, specific activities/projects)
- Resident review (e.g., strengths and weaknesses, goals, previous experience, specific interest areas)
- Scheduling (e.g., hours/schedule, calendar with deadlines)
- Logistics (e.g., parking, dress code, personal item storage, restroom)
- Introduction to work area (e.g., review of pharmacy layout and workflow, computer system(s) and expectations, documentation system)
- Legal and regulatory issues (e.g., HPA)
- How preceptor will evaluate the resident and how the resident will be trained for self-evaluation skills

Precepting the Learning Experience

Core Standards of Pharmacy Residency Preceptors

- Provide the resident with clear and complete description of the learning experience goals, objectives, and expectations.
- Review resident's goals for the rotation at the start of the learning experience
- Clarify the amount of time the resident is expected to devote to the rotation.
- Clarify the priorities of daily activities.
- Indicate to the resident the days/times when you will not be available and assign a contact person when you are not available during clinic hours.
- Establish a list of topics for the rotation. Readings for these topics may be assigned or the preceptor may ask the resident to select may be assigned or the preceptor may ask the resident to select the references. If discussion of the topic is needed, this should be communicated and scheduled with the resident and preceptor.
- Clarify for the resident when it is necessary to contact other pharmacists during making recommendations to physicians or other health care providers.
- Meet with the resident on an ongoing basis for a discussion of potens, projects, topics, and to provide performance feedback.
- Complete evaluations as recommended (see Evaluation and Feedback).
- On rotations, the preceptor will have the resident present any required presentations, journal clubs or projects before the start of the next rotation.

Eight tasks to help facilitate learning

1. Discuss goals and expectations with the learner (Share an orientation)
2. Create a supportive learning environment (Share information for the subject matter and the reading. Give specific, positive feedback)
3. Motivate the learner (Identify tasks where learners can succeed at new skills)
4. Help the learner identify what is important in the situation
5. Use questions to stimulate memory and practice learning
6. Supervise active practice and feedback experiences
7. Demonstrate to the learner learning process (Use "what if" problems to extend beyond cases)
8. Provide ongoing feedback and promote self-assessment (Give praise and constructive feedback to enhance growth)

Short on Time? Try the "One Minute Preceptor" Model

1. Get a commitment (Ask "What is going on?")
2. Probe for evidence (Ask "Why?")
3. Teach one general point
4. Reinforce positive behaviors
5. Correct errors and make recommendations
6. Conclude with a plan

The Four Roles of the Preceptor in Teaching Problem-Solving Skills

Select appropriate strategy, method, and technique to correspond to resident's learning needs

Preceptor Role	Strategy
Diagnose	Identify learner to correct specific to their practice problem
Direct	Identify how a new piece of related information is used
Instructive	Identify one concept in the context of solving a real patient care practice problem
Modeling	Identify strategies to help solve problem
Guiding	Identify the patient but determine different strategies of how patient care practice problem
Collaborative	Identify one tool that you are looking to use to solve a problem
Coaching	Identify learner opportunities to practice solving their patient care practice problem coupled with feedback on that use of strategy
Facilitating	Provide sufficient problem solving practice to build skill
	Ask learners to explain to you how they are thinking in they solve a problem
	Identify learner to evaluate how they work

Evaluation and Feedback

Conversation Openers for Providing Feedback to Learners

- What are your thoughts about my interaction with _____?
- What was your rationale for suggesting [treatment/course of action] to this patient?
- What was the most challenging experience that you had today? What, if anything, could have been done to improve this situation?
- Can you describe one activity or patient interaction that you performed today that made you feel proud?

Criteria for effective feedback

1. As specific as possible in terms of behaviors performed
2. Understandable by the learner (e.g., are you making "suggestions" or mandating actions; do they understand your points?)
3. Focused on the few most important things that need to be changed
4. Timely (scheduled on regular basis; ASAP after a problem)
5. At an appropriate time in a location out of public hearing
6. Positive whenever possible, but not when deserved
7. Not personally demeaning when critical
8. Designed to help the learner to develop and improve

Model for Giving Constructive Feedback

- "Describe performance. What was your best time?"
- "Give the assessment time for you to give your own feedback."
- "Start with what you did well on."
- "How do you think it went? What do you think you did well on?"
- "How did it go for you?"
- "Give specific examples of strengths."
- "What you could do to better yourself?"
- "Give feedback on the 'how'."
- "Start with, I would like you to try..."
- "Could you summarize the main ideas from our discussion? Check for understanding."
- "Let me see again. Keep working on..."
- "Thank you so much!"

What are Outcomes, Goals, Objectives, and Instructional Objectives?

- Educational Outcomes are statements of broad objectives of the residency graduate, regardless of the resident's performance.
- Educational Objectives (EOs) are statements of educational goals to be achieved by the resident at the end of the residency program.
- Instructional Objectives (IOs) are statements of specific, measurable, observable, and verifiable learning objectives that the resident is expected to achieve during the residency program.

Preceptor Evaluation of the Resident

- Do not do learning experience cumulative evaluations (generally for longitudinal experience)
- Must include assessment of work goal and objective assigned to the learning experience
- Preceptor must discuss with the resident
- Monitor and facilitate growth in resident self-assessment skills (Resident completes self-assessment and assessment of preceptor and learning experience)
- Preceptor, resident and program director must agree
- Formative evaluation (e.g., coaching) can be applied to a variety of experiences where written, specific feedback can be used to help improve the resident's performance (generally in Residency). In particular, preceptors are helpful when verbal feedback is given to the resident. It is also helpful to do a brief check at the end of the rotation.
- Provide regular, day-to-day, criteria-based feedback to give the resident information on which to shape his or her task performance.

Marshfield Clinic Pharmacy Resident Residency™ evaluation scale

- (3) Exceeds expectations: Fully accomplished the ability to perform the educational goal or the objective. No further education or education required.
- (2) Meets Expectations: Progress Achievement requires skill development during more than one learning experience. In the current learning experience the resident has progressed at the required rate to attain full ability by end of the program.
- (1) Does not meet expectations: Resident level of skill on the goal or objective does not meet the preceptor's standards of either "achieved" or "satisfactory progress"

Preceptor Guide Contents-1

- Program Purpose
- Program Educational Outcomes

Preceptor Guide Contents-2

- Resident Orientation to Learning Experience
- Precepting the Learning Experience
 - Core Standards of Pharmacy Preceptors
 - Eight tasks to facilitate learning/ 'One-Minute Preceptor'
 - Four Roles of Preceptor in Teaching Problem-Solving Skills

Preceptor Guide Contents-3

- Evaluation and Feedback
 - Conversation Openers
 - Model for Giving Constructive Feedback
 - Preceptor Evaluation of Resident
 - Evaluation Scale

Preceptor Guide Contents-4

- Preceptor Development Program
 - Marshfield Clinic pharmacy residency preceptors must participate in an instructional program specifically for preceptors on an annual basis (equivalent to 2 hours of CE).
- Provided with list of potential activities
 - **A. Computer Based Training**
 - **B. Conferences/Courses**
 - **C. Readings related to Teaching**

Biannual quality improvement

- Preceptor and program director
 - Matching Learning Activities with Objectives (25 minutes)
 - Review of evaluations (20 minutes)
 - Preceptor Development (10 minutes)
 - Balance of Work Time/Teaching (5 minutes)

Questions?

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