ASHP LIVE WEBINAR: Strategies for Creating a Preceptor Development Plan

Holly Phillips, Pharm.D.
Samaneh T. Wilkinson, M.S., Pharm.D.

Tuesday, April 26, 2011
1:00 – 2:00 PM EST

Planned by the ASHP Section of Clinical Specialists and Scientists Section Advisory Group on Preceptor Skills Development as a value added service for members developing residency programs.

The Role of a Needs Assessment in Preceptor Development

Holly Phillips, Pharm.D.
University of Colorado Hospital
PGY1 Residency Program Director
Acute Care Pharmacists Supervisor

University of Colorado Hospital

- Academic medical center for the Rocky Mountain region
- 407 licensed beds
- Tertiary care center affiliated with the University of Colorado Anschutz Medical Campus - School of Pharmacy
  - 4 PGY1 positions
  - 5 PGY2 positions
Introduction

- ASHP Accreditation Standard 4.3 states: RPDs will devise and implement a plan for assessing and improving the quality of preceptor instruction
- What does meaningful compliance look like?

Learning Objectives

- Actively discuss top preceptor development issues identified among peers.
- Describe the development of a preceptor plan based on needs assessment, and discuss strategies to enhance preceptor development activities.
- Share additional methods that can be used to complement a meaningful learning experience for residency preceptors.

Poll Question #1

What is your number one precepting challenge?

1. Providing feedback
2. New tactics for seasoned preceptors
3. Effectively precepting while meeting employment responsibilities
4. Motivating and challenging residents to enhance performance
5. Active teaching methods
2009 University HealthSystem Consortium Survey Results

1. Providing feedback
2. Effectively precepting while meeting employment responsibilities
3. Active teaching methods
4. New tactics for seasoned preceptors
5. Motivating and challenging residents to enhance performance
6. Writing goals and objectives
7. Learning styles of residents
8. Mentoring

https://www.uhc.edu/docs/003740133_Pharmacy_Preceptor_Development_Tools.doc

Getting Started – Assess the Need

Identify your needs from a program perspective

- Tools and Approaches:
  - Roundtable or e-mail
  - Electronic survey
  - Open ended question to solicit responses
  - Ranking tool with pre-determined issues
  - Consider resident evaluations of preceptors and learning experiences
  - Ask your residents

Find a Focus and ENGAGE

- Focus on the top 2 or 3 priorities
- Advertise these priorities to preceptors
- Require preceptor participation in a “think tank” session or other development activities
Identify Resources

- Ask “What do I already have access to?”
  - On-line learning systems
  - Academic programs offered through schools of pharmacy
  - Human Resource classes
  - On-line CE offerings
  - Experts within your preceptor pool
  - ResiTrak™
  - Current residents

Design Learning Opportunities

- Roundtables
- Create case-based scenarios
- CE sessions
- Pearls
- Newsletters
- Create a preceptor mentoring program
- Recognize development efforts on performance evaluations

Summary

- Assess specific departmental needs
- Make it fun and meaningful for preceptors
- Recognize experts and involve them in providing education to newer preceptors
- Use your resources!
- Acknowledge and reward precepting activities
Learning Assessment

When starting to design a preceptor development program, it is best to address all identified areas of need.

- True
- False

Poll Question #2

Getting started: Ideas and tips on how to create a Preceptor Development Plan!

Samaneh T. Wilkinson, M.S., Pharm.D.
PGY-1 Residency Director
HSPA PGY-2 Residency Coordinator
Clinical Manager
The University of Kansas Hospital

Learning Objectives

- Discuss tools necessary to implement a Preceptor Development Program
- Provide examples of Preceptor Development Programs
- Discuss importance of accountability related to the Preceptor Development Program
The University of Kansas Hospital (KUH)

- 606 Staffed Beds
- Level I Trauma Center
- 200 medical specialties
- 24,209 inpatient discharges
- Located in Kansas City, Kansas
- University HealthSystem Consortium (UHC) “Top Performer” in Quality, Safety

The University of Kansas Hospital (KUH) – CLINICAL MODEL

- EVERYONE is a preceptor at KUH.
- Integrated patient centered practice model
  - The good, the bad, the ugly
- Primary rotation site for KU School of Pharmacy
- 4 Residency Programs = 14 residents
  - KUH program history

Poll Question #3

Do you routinely perform a survey to determine the needs of your preceptors for the upcoming year?

1. Yes
2. No
Tools Needed for Successful Plan

- Time
- Baseline data
  - Input from preceptors
  - Input from residents
  - Input from students
- Strategy
  - Discussion (leadership, staff, residents +/- students)
  - Timeline
  - Implement

What should your plan be?

1. Survey staff/preceptors/leadership – what are the weaknesses
2. Discuss findings
3. Require education for everyone
   - Some exclusions
4. Evaluation period
5. Feedback – residents and students
6. Additional monthly discussion sessions

Baseline Data : KUH 2008
Survey conducted of staff to determine where to focus our PDP.
Baseline Data: KUH 2008

Survey conducted of staff to determine where to focus our PDP.

<table>
<thead>
<tr>
<th>I understand the difference between student and resident learning activities (n=16)</th>
<th>TRUE</th>
<th>FALSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2, 12.5%</td>
<td></td>
<td>14, 87.5%</td>
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</tbody>
</table>

Focus areas

1. Developing projects
2. Feedback
3. Evaluation of staffing
4. Rotation development

Poll Question #4

What types of preceptor development programs do you currently have in place?
1. Weekly preceptor meetings (roundtable)
2. Off site retreat
3. Teaching certificate programs
4. Nothing
5. I don’t know
KUH Plan
1. Preceptor ‘Boot Camp’
2. Teaching Certificate Program
3. Preceptor Score Cards
   a. Including attendance
4. Mandatory Learning Experience Guidelines
5. Residency Leadership Meeting
6. Annual Appraisal Evaluation
7. Preceptor Development Series

Preceptor Boot Camp
- Developed to review key concepts and core basics identified by staff
- 3: 1-hour sessions, mandatory, attendance
- Held twice a year by residency leadership
- Topics included:
  1. Becoming an effective preceptor
  2. Creating a win-win experience for residents
  3. Expectation and Feedback

Preceptor Boot Camp
- Additional activities:
  - Learning Types: Doer, Watcher, Thinker, Feeler
  - How to set expectations
  - How to evaluate goals
  - Developing project ideas for residents
  - Using Resitrak
Teaching Certificate Program

- Initiated to support Preceptor Development Plan: higher level precepting
- 12 month program
- Limited to 5 preceptors and 10 residents
- Participants will be required to attend all 7 core 90 minute seminars and 3 elective 60 minute seminars

Objectives:
1. Teach pharmacists the fundamental basics of teaching
2. Give the participants the tools to create their own, effective lectures
3. Give the participants the tools to be effective teachers outside of the classroom
4. Help participants develop their own teaching styles

Preceptor Score Cards

- Developed to ‘grade’ preceptors on their skills at the end of the year
- Performance Tool
  - Department expectations
  - Benchmark
- Evaluation Content is on areas of focus for PDP
- Assist in Accountability

<table>
<thead>
<tr>
<th>Objective</th>
<th>Score</th>
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<tr>
<td>Teach pharmacists the fundamental basics of teaching</td>
<td>15 points</td>
</tr>
<tr>
<td>Give the participants the tools to create their own, effective lectures</td>
<td>15 points</td>
</tr>
<tr>
<td>Give the participants the tools to be effective teachers outside of the classroom</td>
<td>15 points</td>
</tr>
<tr>
<td>Help participants develop their own teaching styles</td>
<td>20 points</td>
</tr>
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</table>

Attendance: 100 points max
- Always
- Frequently
- Sometimes
- Never

Resident Activity
- People Involvement
- Rotation Binder
- Poster/Project

Growth: n/a
- Cost: $0

Evaluation Period = 07/01/2009 thru 01/31/2010

Number of Evaluations: 10

Comments: Service

Preceptor: Resitrak summaries found in resident evaluation rotation use as a reference on complete rotation binder to provide residents with a meeting presented at a national mentor a resident poster secondary author and serve as a primary or rotation experience determine overall.

Wilkinson, Samaneh EID 105698 rounds, journal clubs, the weekly resident grand participate in a majority of.
Example – Score Card

Activities Attendance

Example – Score Card

Mandatory Learning Experience Guidelines

- Pre-rotation meeting
  - 7 – 10 days prior to the start of the rotation
  - Review expectations
  - Develop goals
  - Develop calendar
  - Review rotation syllabus
  - MAKE THE RESIDENT SIGN IT!!!
- Discuss evaluation process
Polling Question #5

Do you have a forum for preceptors to openly discuss programmatic and/or specific resident issues?

1. Yes
2. No

Residency Leadership Meeting

- Monthly meeting
- Includes Program RPDs and Coordinators
- Discuss obvious topics as well as plan for following month’s Preceptor Development Series
Preceptor Development Series

- Monthly preceptor – only meeting
- Held after staff meeting
- Limited to 45 minutes
- Attendance
- Variety of topics including resident performance issues
- Buy in from preceptors for programs
- Various forms of ‘education’: discussion, presentations, role play – change it up!

Accountability

- Preceptor Score Card
- Department Goal – appraisal tool
- Attendance
- Resitrak evaluations
- Student evaluations

Get the residents involved!

- Set up pre-rotation meetings
- Syllabus format
- Evaluations are included in Preceptor Score Cards
- Exit surveys
- Preceptor of the Year
Results: 2010

<table>
<thead>
<tr>
<th>I know what a pre-rotation meeting is and what should be covered (n=23)</th>
<th>TRUE</th>
<th>FALSE</th>
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<tr>
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<td>1, 4.5%</td>
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Results: 2010

<table>
<thead>
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<th>I always have a pre-rotation meeting with my resident prior to the rotation (n=23)</th>
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<th>FALSE</th>
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<tbody>
<tr>
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<td>7, 30.5%</td>
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Results: 2010

<table>
<thead>
<tr>
<th>I have a rotation binder that I give all of my residents prior to the start of the rotation (n=23)</th>
<th>TRUE</th>
<th>FALSE</th>
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<tr>
<td></td>
<td>15, 65.3%</td>
<td>8, 34.7%</td>
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</table>
**Results: 2010**

<table>
<thead>
<tr>
<th>Information</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Optional readings</td>
<td>72.2%</td>
</tr>
<tr>
<td>Required readings</td>
<td>66.7%</td>
</tr>
<tr>
<td>Rotation syllabus and description</td>
<td>61.1%</td>
</tr>
<tr>
<td>Rotation objectives</td>
<td>61.1%</td>
</tr>
<tr>
<td>Rotation calendar</td>
<td>38.9%</td>
</tr>
<tr>
<td>I don’t know</td>
<td>11.1%</td>
</tr>
<tr>
<td>N/A</td>
<td>5.6%</td>
</tr>
</tbody>
</table>

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**What should your plan be?**

1. Survey staff/preceptors/leadership – what are the weaknesses
2. Discuss findings
3. Require education for everyone
   - Some exclusions
4. Evaluation period
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**What will work best for your preceptors?**

- **Meeting vs. Electronic**
  - Time of day
  - Conference call
- **Self vs. Group**
  - Personal goals
  - Department goals
- **WRITE IT DOWN!!**
- **EVALUATE IT!!**
  - On – going process
  - Will need to change yearly
Praise, praise, praise

- Preceptor of the Year – School of Pharmacy
- Preceptor of the Year – PGY-1
- Admin Preceptor of the Year
- Annual Resident Banquet
- Staff Meeting Announcements