PRECEPTOR DEVELOPMENT:
ASSESSING LEARNER PERFORMANCE, PROVIDING FEEDBACK, AND COMPLETE EVALUATIONS

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February 9, 2020
Disclosures

I have no actual or potential conflict of interest in relation to this presentation.
Objectives

- Develop a process for assessing a learner based on performance during clinical rotations.
- Describe the importance of objective, criteria-based evaluations.
- List strategies for providing timely, both positive and constructive, feedback to learners.
- Design a feedback session tailored to an individual learner.
Definitions

- Learner = pharmacy student, pharmacy intern, pharmacy resident
Process for Assessing Performance

- Goals and objectives
  - Communicate activity
  - Level of performance expected (Miller’s learning pyramid)
- Set expectations/progression
- Discuss evaluation scale

Miller’s Learning Pyramid

www.reachergate.net
Process for Assessing Performance

- Direct Observation of skills
  - Time for performance to reach “steady state”; consistent performance
  - Use information observed from other evaluators (physicians, nurses)

- Process for recording observation
  - Diary format works well for most preceptors
  - Understand rating instrument

- Assess performance
  - Perceived impressions lead to biased observations
  - Assess facts NOT opinions
  - Avoid applying more weight to negative/inconsistent performance
  - Use standardized assessments for longitudinal tracking

# ASHP 4 Preceptor Roles

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<th>Role</th>
<th>Description</th>
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| Direct Instruction | - Classroom instruction to teach content  
                   | - Readings, guidelines reviews, discussions  
                   | - APPE and residents should do independently |
| Modeling     | - Preceptor shows learner what to do  
                   | - Preceptor thinks out-loud |
| Coaching      | - Learner performs the skill while preceptor observes  
                   | - Learner thinks out-loud so preceptor can observe  
                   | - Preceptor provides ongoing feedback  
                   | - Preceptor and learner can work together or separately and compare |
| Facilitating | - Learner performs independently  
                   | - Preceptor confident in learners ability but remains available if needed |

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Self Assessment Question

Identify the correct preceptor role for the following scenarios:

Prior to rounds the learner presents patients and rehearses recommendations to the preceptor.  COACHING

A nurse asks you a question about a missing medication and you show the learner how to inventory the Pyxis machine.  MODELING

The learner independently performs discharge education to a patient and reported back to preceptor how it went.  FACILITATING

The learner struggles developing a careplan for a NSTEMI patient so you assigned a topic discussion.  DIRECT INSTRUCTION
Critical Thinking Steps

1. Collect and organize patient information
2. Identify medication related problems
3. Assess medication related problems
4. Develop care plan for medication related problems
5. Implement care plan for medication related problems
6. Monitor and follow-up
Bloom’s Taxonomy Revised
Tips for Providing Feedback

- Provided by preceptor directly involved in supervising/rating
- Given when alone with student in an appropriate setting
- Preceptor and student should work as “allies” with the common goal of improving a desired skill
- Seek student input and discuss self evaluation
- Feedback sandwich – [positive] [negative] [positive]
- Provide specific examples – refer to notes/diary – used to assign score

Tips for Providing Feedback

- Feedback SHOULD:
  - Criteria-based
  - Be first-hand data
  - Enough quantity (remember “steady state”)
  - Include QUALITY not just quantity
  - Limited to behavior that is remediable
  - Focused on performance... NOT the performer (learner)

Tips for Providing Feedback

- Encourage learner to respond and discuss feelings about assessment
- Collaborate with student to develop a performance improvement plan
  - Include examples of correct performance/skills and expectations
- Discuss timing of next feedback session

Feedback Examples

■ Example 1: “Good job!”
  - NO. Does NOT include specific information

■ Example 2: “You saw all patients in clinic today.”
  - NO. Only addresses what was done, but NOT how well it was done. Should include quality of performance NOT just quantity.

■ Example 3: “You gave appropriate recommendations and specific therapeutic goals to the team using practice guidelines.”
  - YES. Leaner told specifically why he is doing well.
Self Assessment Question

Which of the following provides valuable feedback to a learner?

a. Great job on the vancomycin note for Mr. Smith. I co-signed it and it is now part of the patient’s medical record.

b. Today you reviewed 5 new patient charts, attended multidisciplinary rounds, and wrote 2 progress notes.

c. You correctly identified the primary problem and developed an appropriate care plan for the pneumonia patient last week.

d. Your verbal recommendations on rounds today were clear, concise, and accepted by the physician. Great job!
My Basic Feedback Session

- **Knowledge**
  - Baseline knowledge for pharmacology and therapeutics
  - Performance on informal and formal topic discussions
  - Process for identifying “knowledge gaps” and commitment to lifelong learning

- **Clinical Skill Sets**
  - Formal assignments (journal clubs, progress notes, DI questions, etc.)
  - Informal daily skills (patient education, communication, etc.)

- **Critical Thinking and Clinical Judgment**
  - Critical thinking and applying knowledge

- **Professionalism**
  - Timeliness, attire, attitude, work ethic, etc.

- Identify 3 areas to improve with specific goals and plan
Case 1: MW

MW is a PGY1 pharmacy practice resident on an internal medicine learning experience. You are his primary preceptor and preparing the midpoint evaluation. MW is struggling to get work completed by the end of the day and you are unsure if/when MW will be able to follow the entire service.

Describe the process for assessing MWs performance.

Describe the process for assessing your (preceptor) performance.

Plan a feedback session.
Case 2: TS

TS is a 4th year APPE pharmacy student on an adult medicine rotation. You are her primary preceptor and preparing the midpoint evaluation. TS is exceeding expectations and you are encouraging her to pursue employment at your institution.

Describe the process for assessing TSs performance.

Describe the process for assessing your (preceptor) performance.

Plan a feedback session.
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