



A conference that is for us and by us

The Student Has Become the Master: Preceptor Development for New Practitioners

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Disclosures

No one involved in the development of the educational content has a relevant financial relationship to disclose

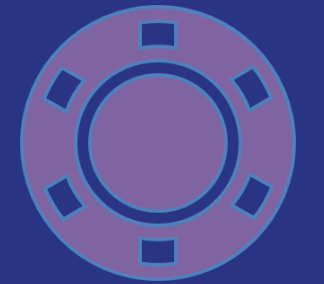
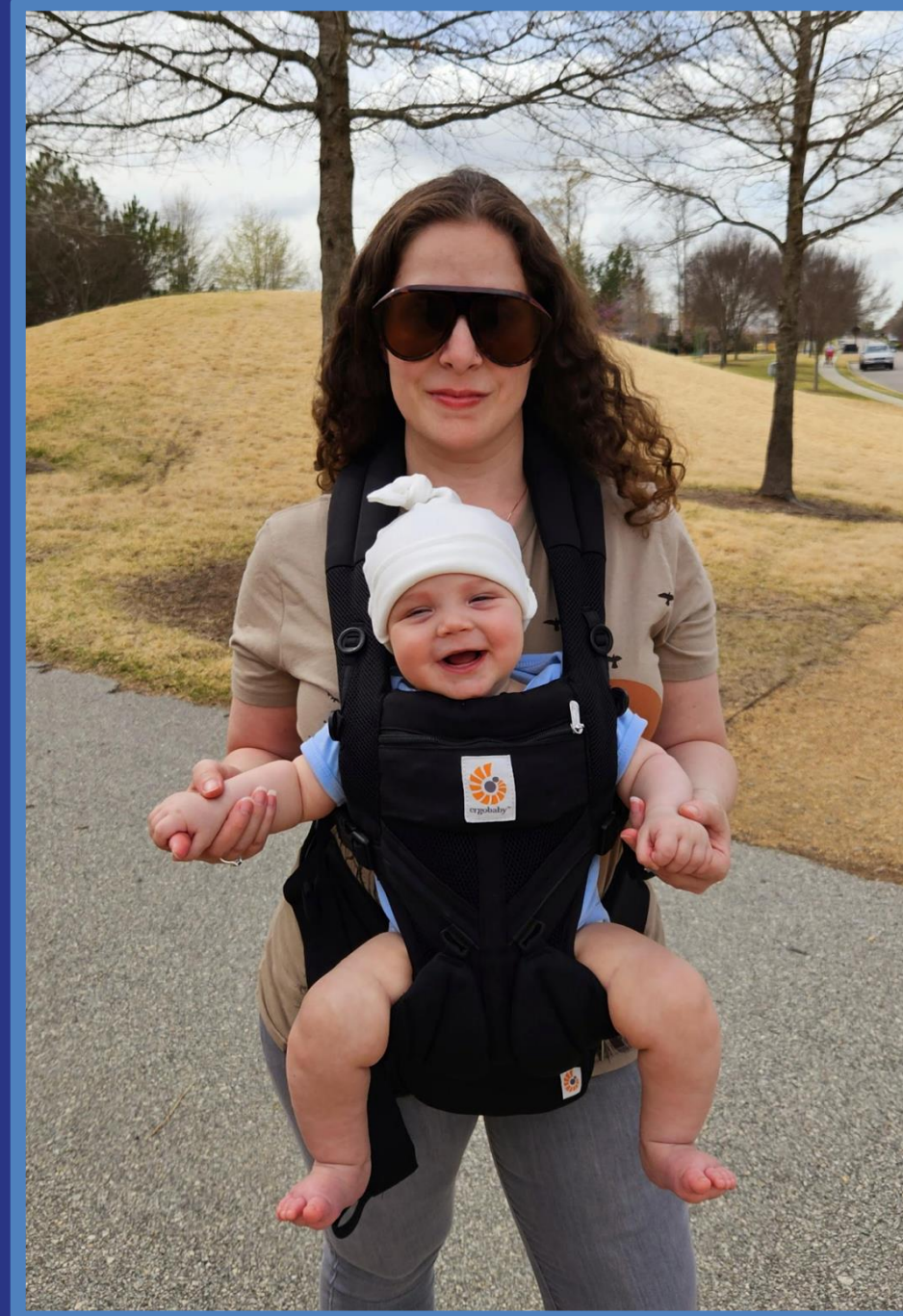
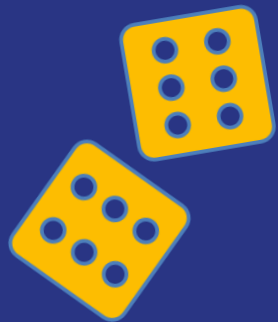
All included quotations and likenesses of former learners done with written permission from the individual referenced

Learning Objectives

Pharmacists:

1. Apply adult learning principles and effective communication strategies to mentor and precept novice practitioners transitioning from student roles to independent clinical practice.
1. Develop a structured preceptor development plan that incorporates reflective feedback, evidence-based teaching techniques, and continuous improvement strategies to foster clinical excellence and professional growth in new practitioners

Not at the Table, Baby John Carlo



Key Principles of Mentoring and Precepting Learners Transitioning to Independent Clinical Practice*

**Emergency Medicine Style*

Audience Poll 1



When you transitioned from being a student or resident to a pharmacist, did you have a mentor or preceptor that stood out as an important person for you during this transition?

When I Asked Former Learners This Same Question:



When you transitioned from being a student or resident to a pharmacist, did you have a mentor or preceptor that stood out as an important person for you during this transition?

YES

yes



yes



yes

YES



What is the Difference Between a Mentor and a Preceptor? ^{1, 2}

MENTOR

Who is a Mentor?

- Anyone providing guidance to a mentee

How is the relationship established?

- Mentors and mentees may be formally matched, or relationship may develop organically

What does a Mentor provide?

- Advice
- Guidance
- Knowledge
- Career development
- Soft skills

PRECEPTOR

Who is a Preceptor?

- A pharmacist who has met all 6 Preceptor Criteria as defined by American Society of Health-System Pharmacists (ASHP)

How is the relationship established?

- Assigned in advance using a formal process which includes pre-specified expectations and objectives

What are the 6 Preceptor Criteria?

- Use instructing, modeling, coaching, and facilitating
- Assess performance with specific feedback
- Is recognized in pharmacy practice
- Hold an established, active practice
- Maintain continuity of practice during learning
- Maintain ongoing professionalism

Audience Poll 2



If you had a mentor or preceptor during your transition, how would you describe them?

Characteristics of an Effective Preceptor ³ VS. Former Learner Survey

<u>ATTRIBUTE</u>	<u>MENTIONED?</u>	<u>SKILLS</u>	<u>MENTIONED?</u>
Approachable	XXX	Leadership	X
Nurturing		Clinical expertise	XX
Open	X	Excellent communication	XX
Respectful	X	Consistency	XXX
Accountable	X	Feedback	X
Courteous		Team player	
Accessible	XX	Exemplary role model	XX
Sensitive		Facilitation	XX
Enthusiastic	XX	Self-reflection	
Patient	XX		

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Sensitive		Facilitation	XX
Enthusiastic	XX	Self-reflection	
Patient	XX		

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Respectful	X	Consistency	XXX
Accountable	X	Feedback	X
Courteous			
Accessible			XX
Sensitive			XX
Enthusiastic			
Patient	XX		

Additional Characteristics:

- CHALLENGED MENTEE
- CHECKED IN FREQUENTLY
- OFFERED INSIGHTFUL ADVICE
- ALWAYS ENCOURAGED MENTEE
- **USED DIRECT COMMUNICATION**

When I Asked Former Learners This Same Question:



If you had a mentor or preceptor during your transition, how would you describe them?

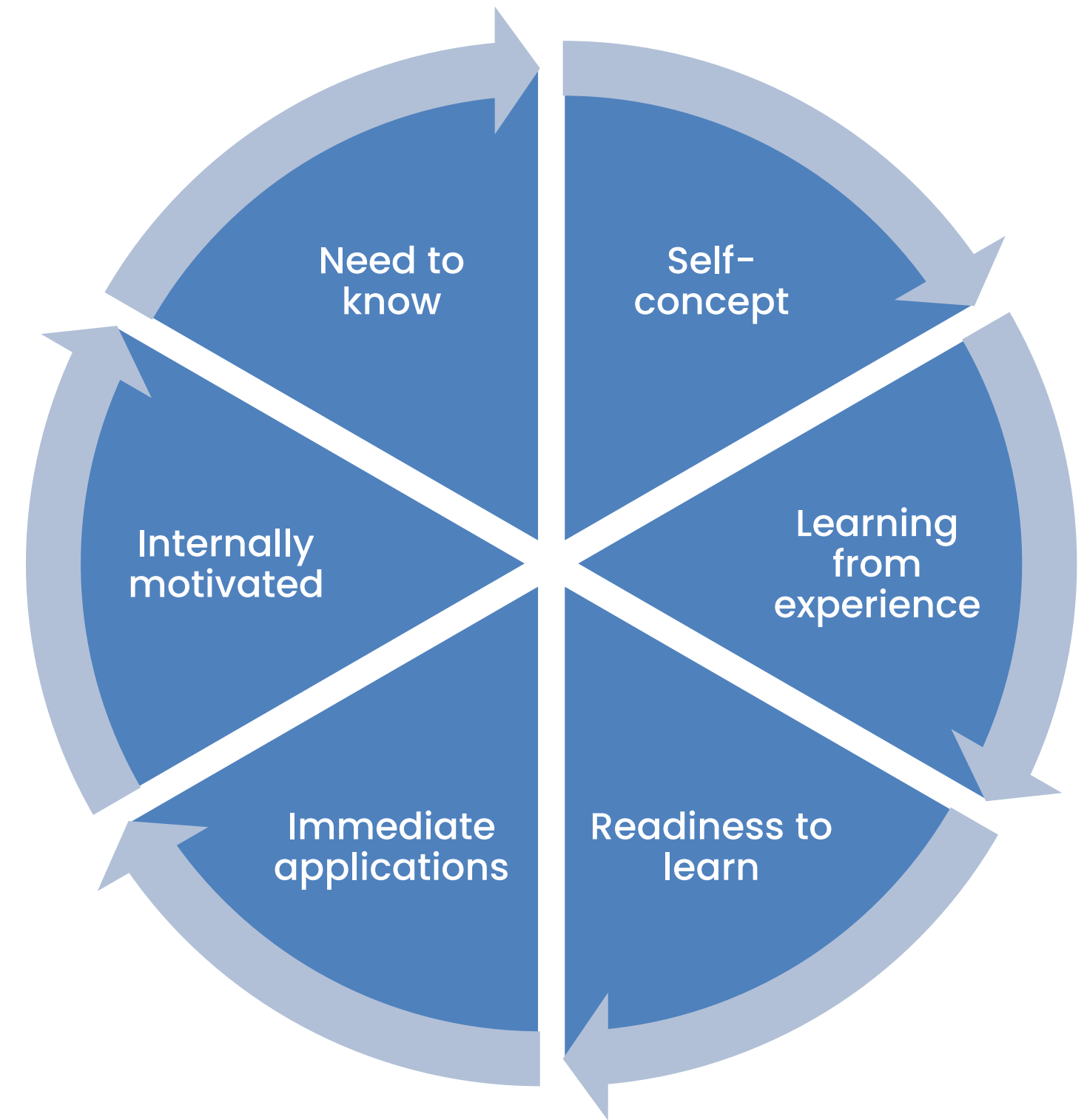
Approachable

Consistent

Direct

How Adults Learn: The Andragogy Learning Theory ^{4,6}

- In 1968, Dr. Malcolm Knowles proposed a theory differentiating the way that adults learn (as opposed to the learning of children)
- **Andragogy:** principles of adult learning
- Knowles' andragogy learning theory is based on 6 main assumptions about how and why adults learn new concepts or skills



How Adults Learn: The Adult Principles of Learning ^{4,5,6}

Based on Knowles' assumptions about adult learning, we can derive basic principles to achieve learner-centered education

The teacher should:

- Be able to analyze and check teaching material
- Receive feedback about their process
- Gain significant knowledge and experience from training

The education provided should:

- Rely on the experience of the teacher
- Focus on solving specific problems

“He who can, does; he who cannot, teaches...”

– George Bernard Shaw, *Man and Superman*, 1903

Your job
as a preceptor
is **NOT**
to teach...

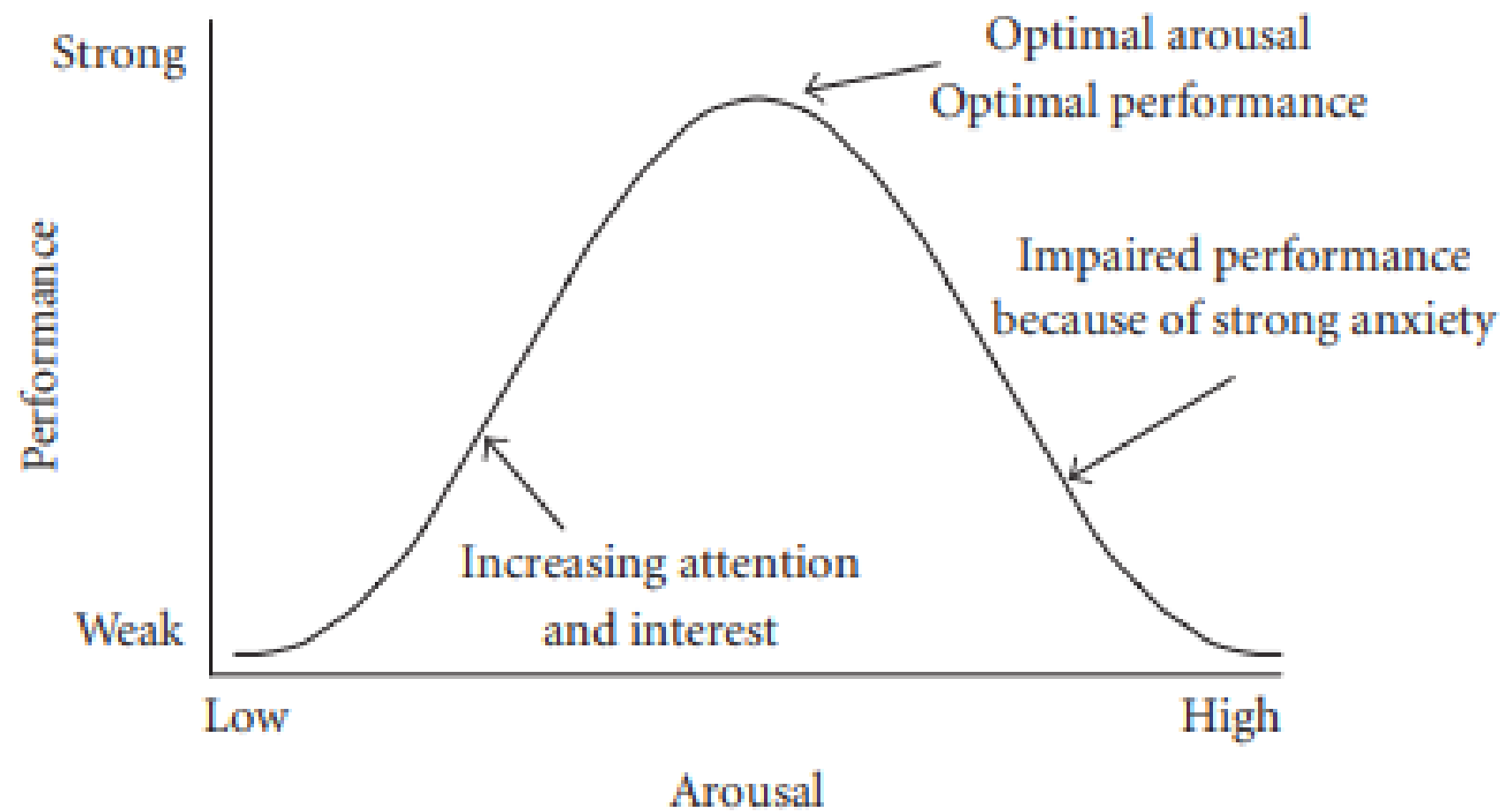
but to
FACILITATE
learning



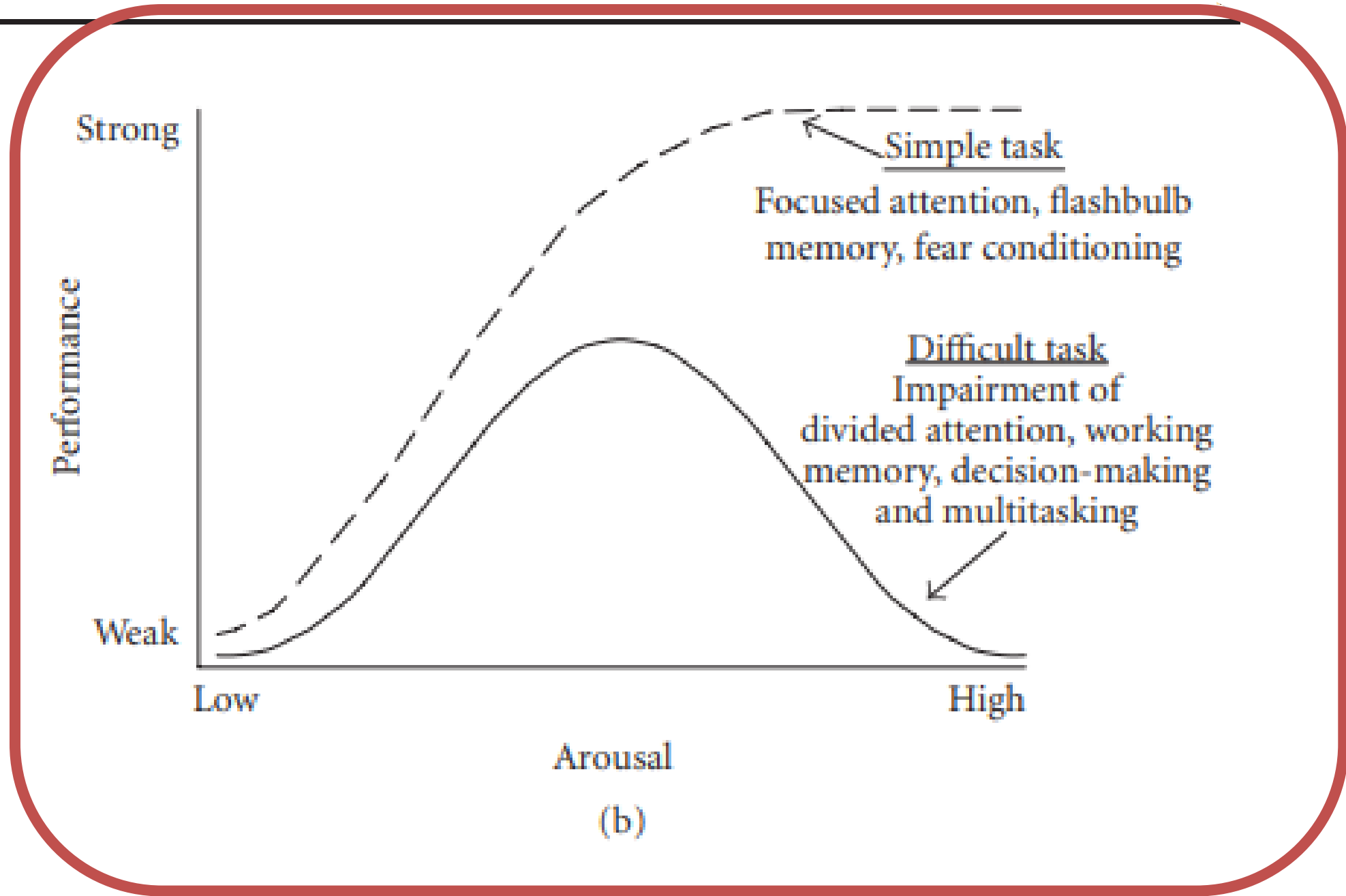
The Relationship Between Stress and Learning ⁷

The Yerkes-Dodson Law, revisited

David M. Diamond et al.



(a)



(b)

How Does Learning Change from Training to Pharmacy Practice? ⁸

American Journal of Pharmaceutical Education 2014; 78 (8) Article 147.

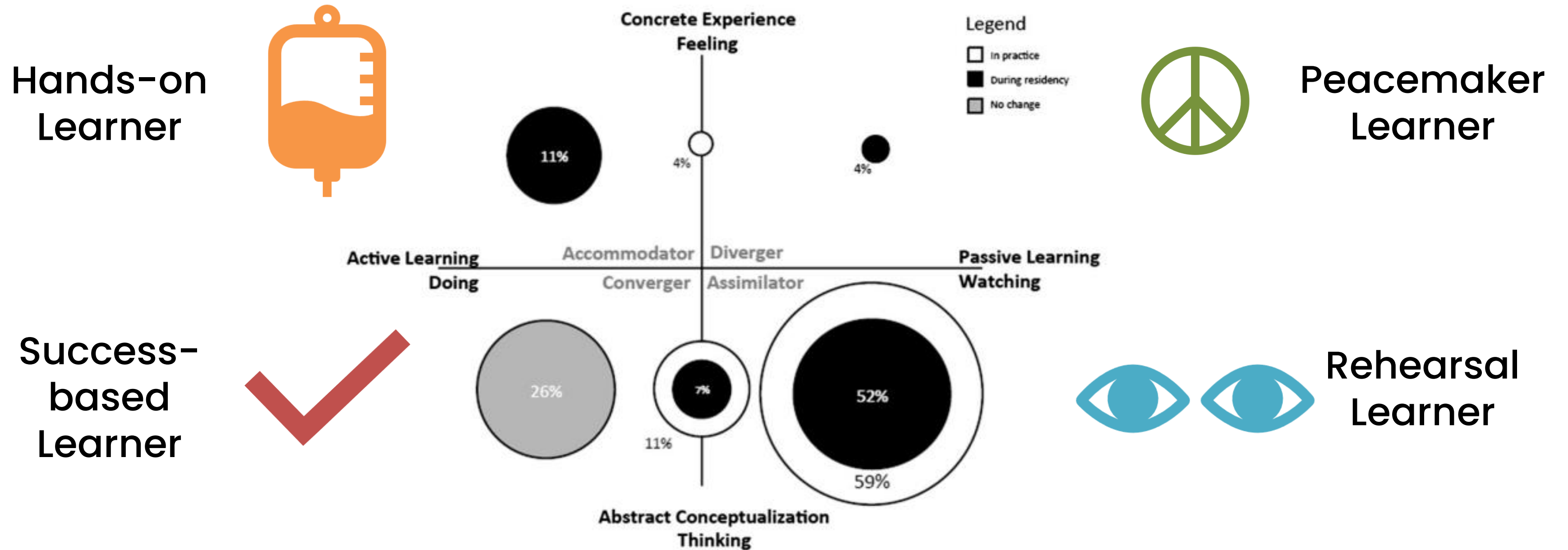
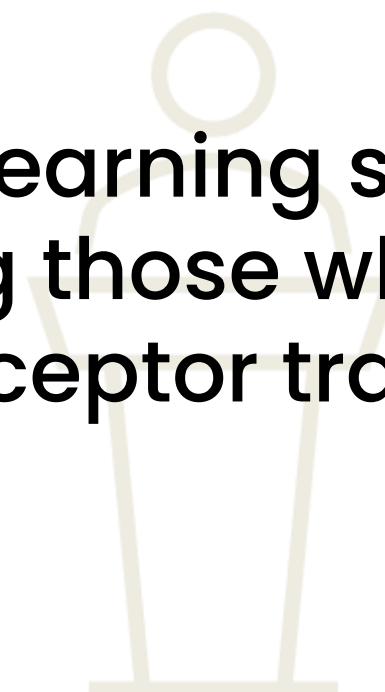
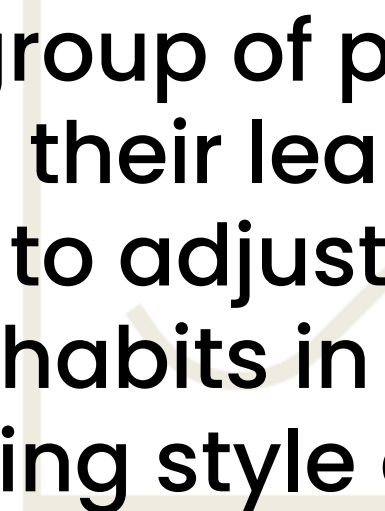


Figure 2. During residency vs in-practice dominant learning style plotted in quadrants, illustrating the characteristics of learning styles.

What Inspires A Change in Learning Style? ⁸



Change in learning style was **only seen** among those who completed preceptor training



The subgroup of participants who changed their learning style were **more likely** to adjust their professional or clinical habits in response to their learning style assessment

Completion of formal preceptor training correlates with a higher likelihood of a preceptor changing their learning style and clinical habits

Audience Knowledge Check 1



1. Which of the following are assumptions about how and why adults learn new concepts or skills (based on Knowles' andragogy learning theory)?

- A. Adult learners have a self-concept, so learning can be self-directed and internally motivated
- B. Adult learners learn from experience
- C. An adult's readiness to learn is higher when the subject immediately matters to them
- D. Adult learners need to know the "Why?" and "How?"
- E. All of the above

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Donna's Communication Strategies for Developing a Future EM Pharmacist*

**Who is a Total Rockstar*

Effective Communication Skills Are Vital for Pharmacists To Succeed ⁹

Communication is a key competency and crucial for success as a practicing pharmacist

Core Competencies Identified

- Critical Thinking
- Collaboration
- Adaptability
- Initiative
- **Effective Communication**
- Analyzing Information
- Imagination
- Self-awareness

Communication Includes:

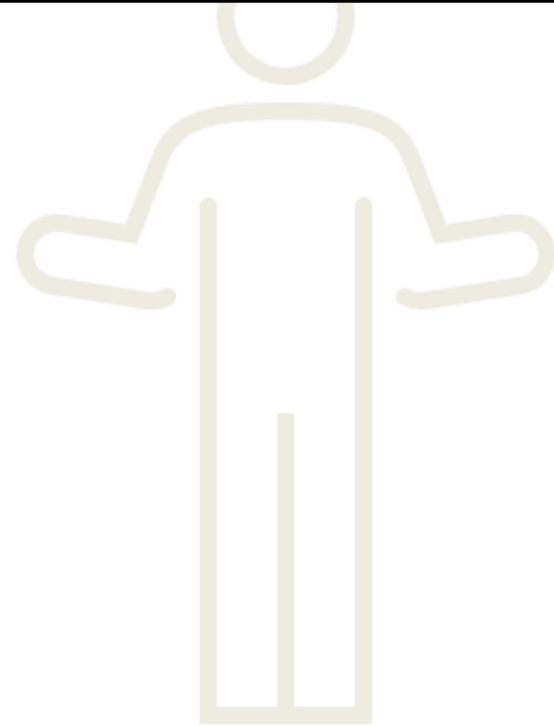
- Verbal AND written
- Interdisciplinary
- Interdepartmental
- External to organization

Communication Must Be:

- Clear and concise
- Focused and energetic
- Appropriate for situation

Effective Preceptor Communication Encourages Learning

What Do I Do?



How Do I Do It?



How Do I Do It..
Better?



Effective Preceptor Communication Encourages Learning

What Do I Do?

- Set tangible goals
- Establish clear expectations
- Set deadlines

How Do I Do It?

- Know your audience
- Skill-specific orientation

How Do I Do It.. Better?

- Frequent feedback
 - Positive AND negative
- Ask the right questions

Understand What Motivates Them



...running around the desert together
in Las Vegas...

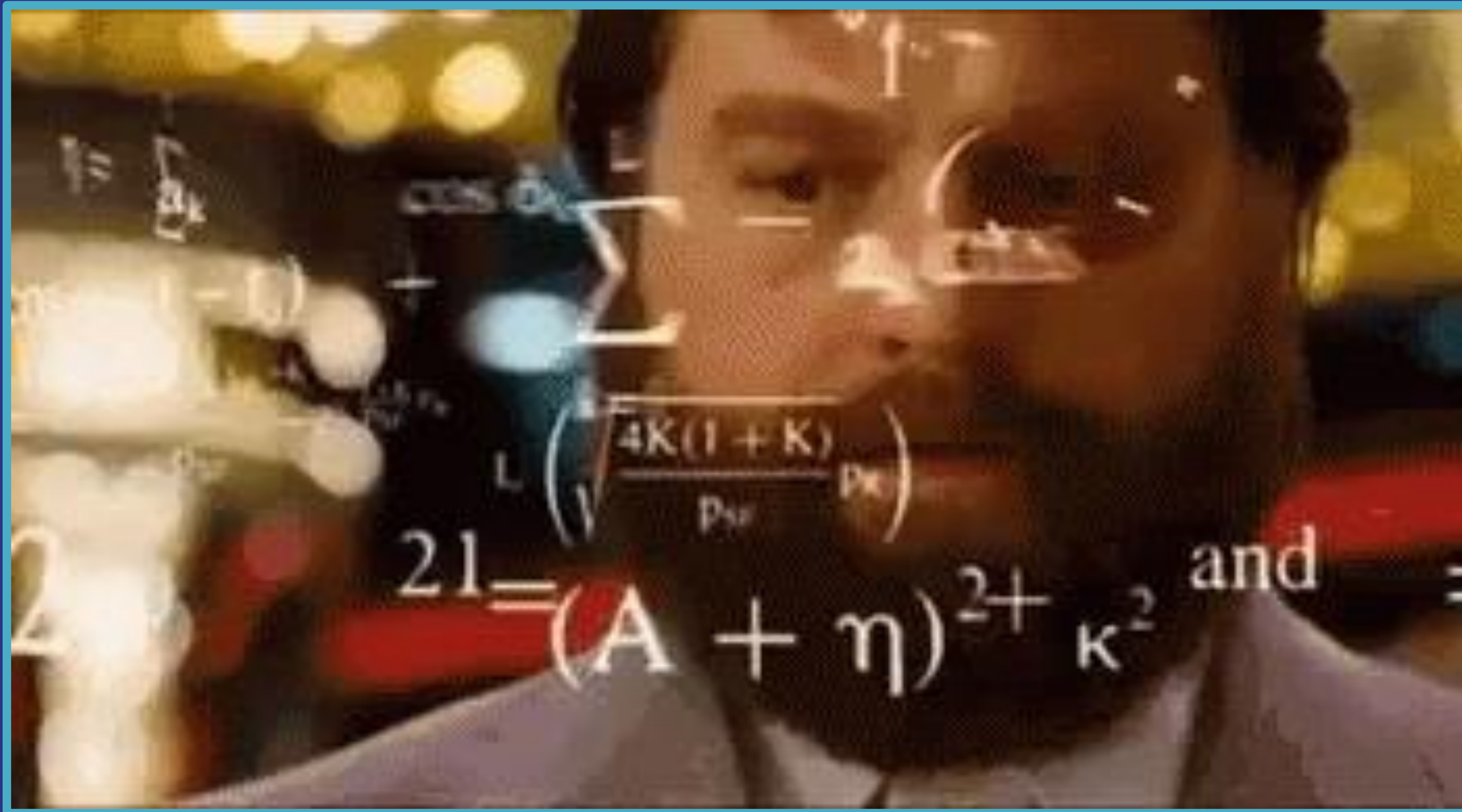
Employ Professional Respect



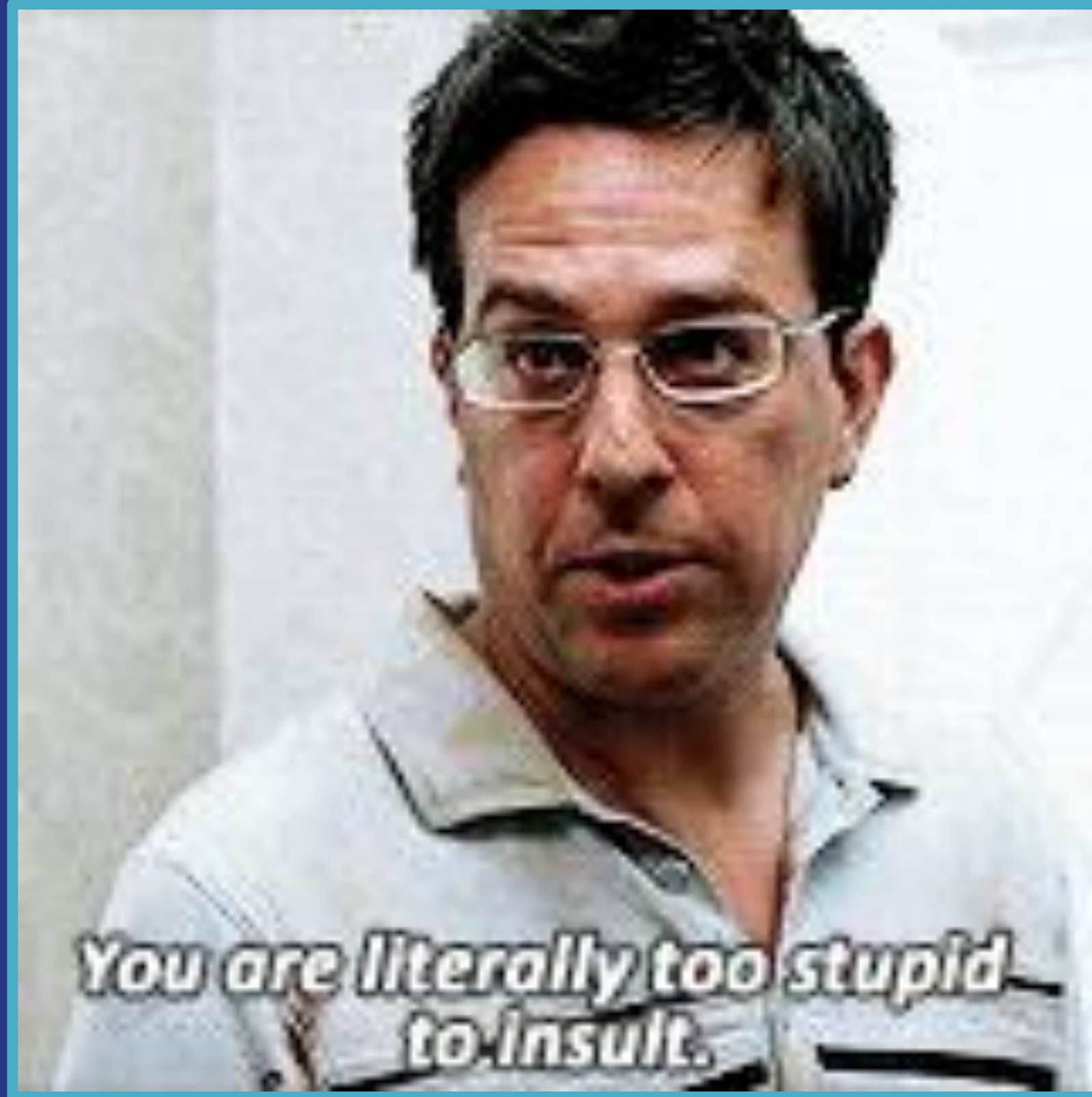
Integrate Hands-On Learning



Seek Out Opportunities for Critical Thinking



Ask for As Much Feedback As You Give



Case Study 1

It is July in the Emergency Department (ED) and you have been selected to assist with new resident orientation for your institution's PGY1 class. You are scheduled to pick up a resident in 10 minutes. Your pager goes off and 2 patients suffering gunshot wounds are due to arrive any moment, and both will likely require intubation. There are 45 boarding patients in your ED and several physicians and nurses have questions for you.

Case Study 1

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How can you apply the adult principles of learning to maximize this resident's experience during orientation?

Case Study 1

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What communication principles can you employ to effectively facilitate learning for this resident?

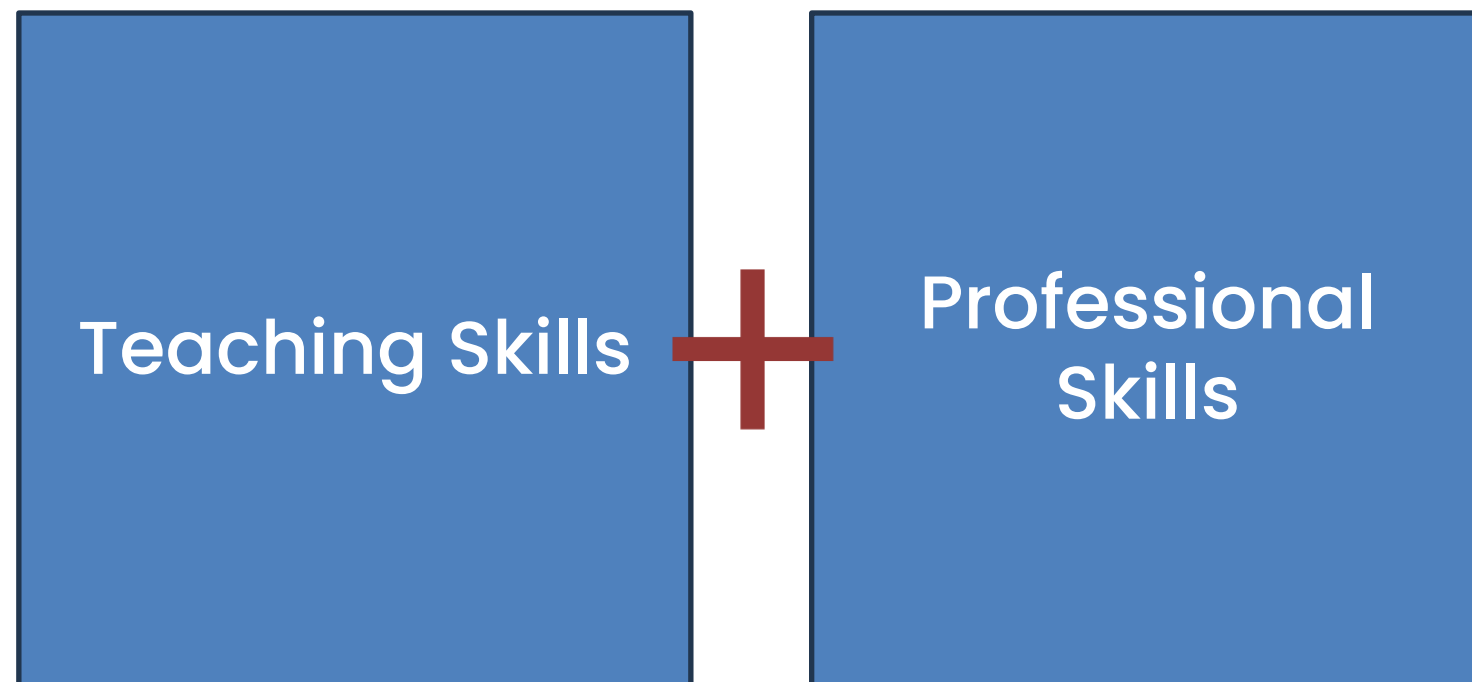
How to Design A Structured Preceptor Development Plan that Will Foster Excellence and Growth in New Practitioners*

**When Your ER is on Fire*

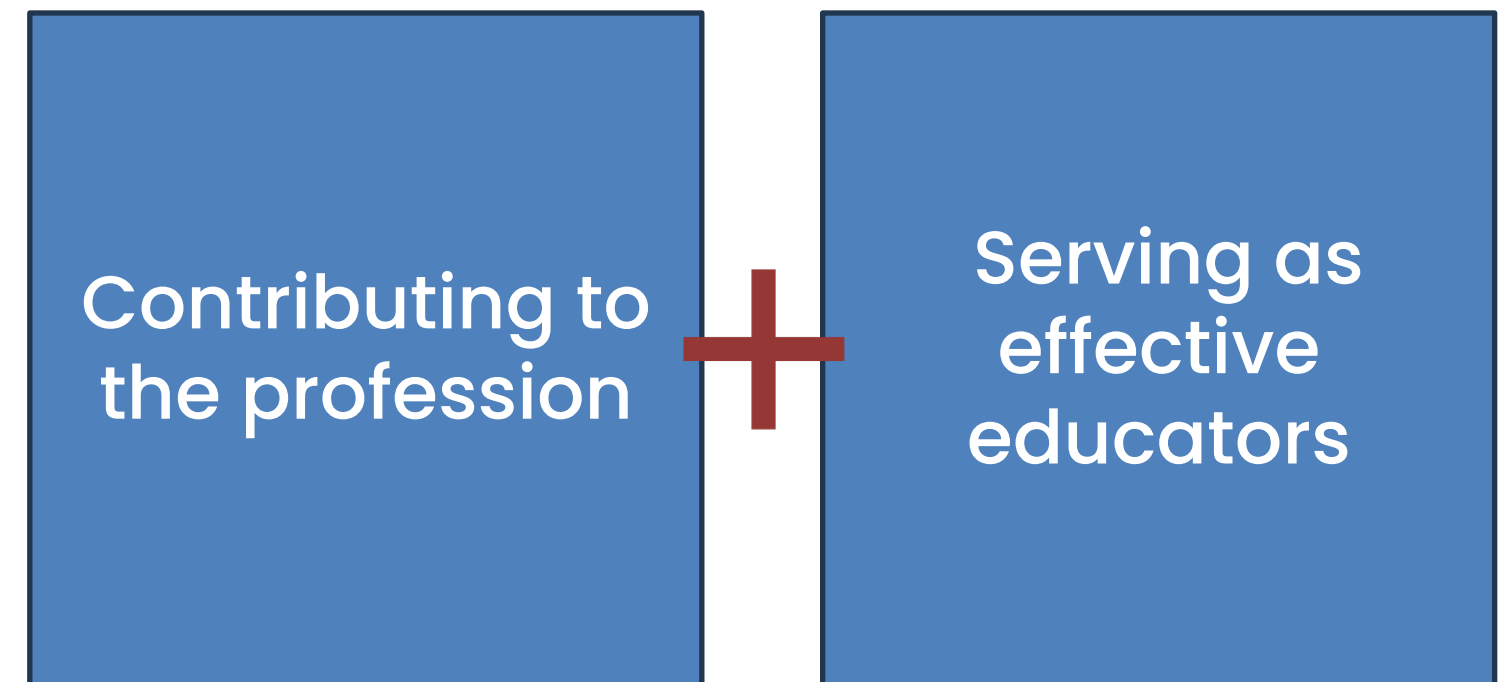
What is Preceptor Development? ^{2, 10}

A term used by ASHP to describe the approach a residency program uses to ensure the program's preceptors are continually assessed for skills, quality of instruction, and continued improvement

ASHP accreditation standards address the Residency Program Director (RPD) and preceptors in 2 key areas:



The goal is to ensure preceptors are:



What Does A Preceptor Development Plan Include? ¹⁰

What Do I Do?

(Needs Assessment)



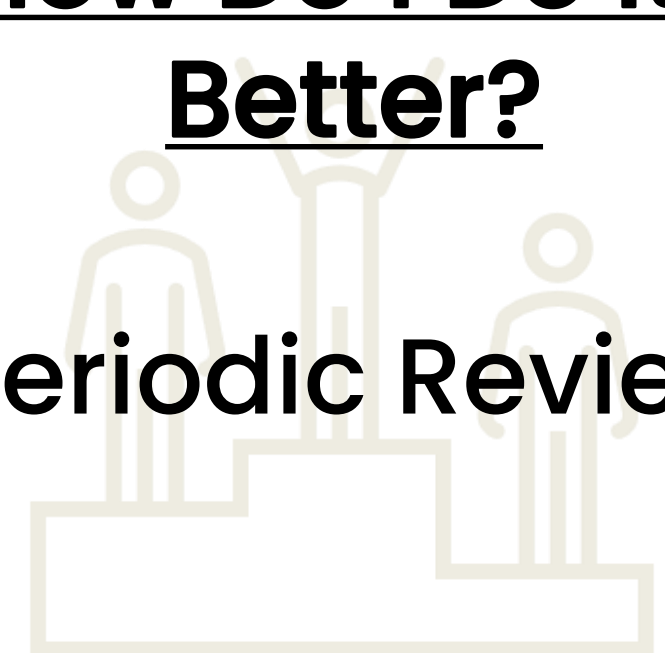
How Do I Do It?

(Activities)



How Do I Do It.. Better?

(Periodic Review)



What Do I Do?

(Needs Assessment)



- Essential to frequently assess preceptor needs to identify development opportunities that are individually tailored
- Annual needs assessment
 - Consider time and practice constraints of preceptor
 - Ensure assessment aligns with program requirements

Habits of Highly Effective EM Pharmacy Preceptors ^{13,14}

Habits of Preceptors Rubric At-A-Glance:

Domain	Preceptor Habit	Habit Level Achieved			
		Developing	Proficient	Accomplished	Master
1. Preceptor is a practice role model	1.1 Demonstrates professionalism in character, competence, and connection with others as per the Taxonomy of Professionalism	Each of the 11 preceptor habits should be individually assessed for achievement (i.e., developing, proficient, accomplished, master). The progression through the habit levels (i.e., from developing to master) should be based on the quality with which the preceptor displays each habit. This does not require or imply that experience alone connotes higher-level behaviors/abilities. Furthermore, for each individual preceptor habit, progression implies achievement of all descriptions in preceding levels. Within some of the habits, the level achieved is based upon the amount of time that preceptor displays a given behavior/ability. Occasionally (0 – 25%) Frequently (25 – 50%) Usually (50 – 75%) Always (75 – 100%)			
	1.2 Establishes and maintains professional relationships				
	1.3 Demonstrates self- and social- awareness in communication				
	1.4 Displays an outcomes-oriented approach to their professional work				
	1.5 Engages in continuous professional development (CPD)				
	1.6 Advocates for positive change in the pharmacy profession				
2. Preceptor is an effective educator	2.1 Creates a positive learning environment				
	2.2 Uses established precepting principles				
	2.3 Adapts teaching methods to meet the needs of individual learners				
3. Preceptor provides high-quality assessment of learners	3.1 Provides accurate, quality feedback to learner				
	3.2 Evaluates learner performance appropriately				

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HOP Website activities can be used as part of the continuing professional development credits for BPS recertification



For full rubric: <https://www.habitsofpreceptors.org/>

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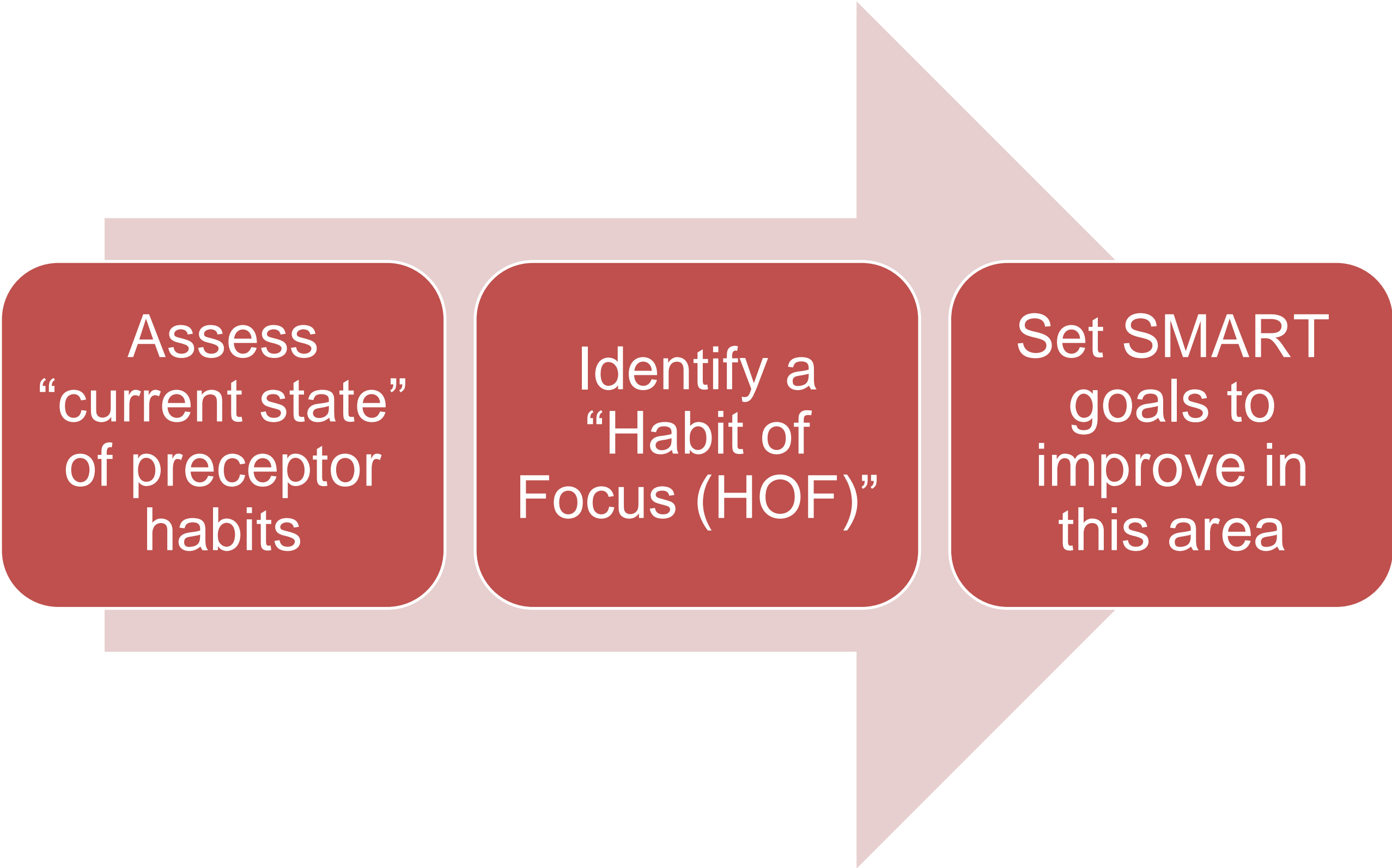
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Setting Preceptor Development Goals... the SMART way ^{13,14}



- S** • Specific
- M** • Measurable
- A** • Attainable
- R** • Relevant
- T** • Time-based

How Do I Do It?

(Activities)



- Content:
 - Should go above and beyond clinical topics
 - Precepting and teaching
- Delivery:
 - Virtual vs. in-person
 - Formal vs. informal
 - Visual vs. audio
- Frequency:
 - On demand is preferred
- Integration:
 - Can education be integrated into practice
 - Layered learning

Preceptor Development: Making It Work For You ¹²

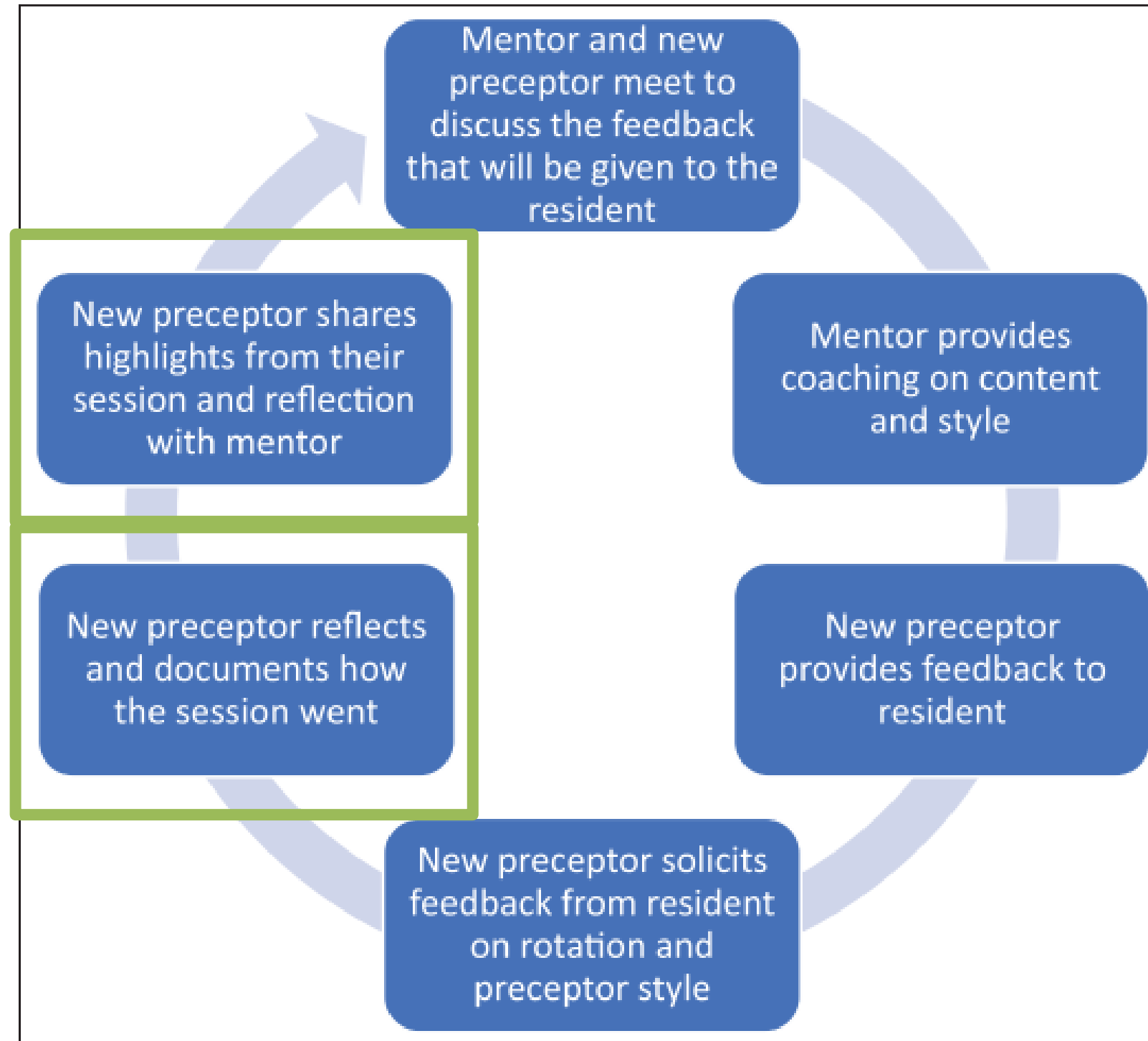
In Emergency Medicine- time is precious and efficiency is key!

Table 3. Positive and Negative Features of Preceptor Development Programming that Participants Have Previously Attended

Positive Feature	Negative Features
Included resources & support from the school about learner expectations	Programming that does not have explicit strategies for application
Interaction, collaboration, & learning from other preceptors	Short notice or infrequent availability of programming
Choice of delivery formats (ie, virtual or on-site) with education credit	Requiring training that may be misaligned with individual needs
Choice of topics related to level of experience (ie, novice to expert)	Information that is outdated or does not have clear supporting evidence
Integration of experts in the practice or educational topic	Delivery formats that prevent interaction & engagement

Preceptor Development: Mentorship and Reflective Feedback ¹⁵

Figure 2. The recommended process for mentors to provide coaching, including feedback, for new preceptors.



- A mentor is not required, but can be valuable in coaching a new preceptor
- Mentorship also provides a vital opportunity for preceptors to reflect on feedback

Reflection requires time

Preceptor Development: Maintaining Continuous Improvement ^{17,18}

How Do I Do It... Better? (Periodic Review)



Overcome task paralysis

- Actually start, and start early
- Take small steps
- Seek mentorship

Help yourself

- Set aside time for ACTUAL reflection
- Select opportunities that support your long-term career goals

Make improvement easier

- Use your resources (organizations, program)
- Pursue what excites you (unique strengths)

Key Takeaways for the Emergency Medicine Preceptor

Emergency Medicine is an **INCREDIBLE** Specialty to Support New Pharmacist Practitioner Learning

- **Adults learn best when:**
 - The subject immediately matters to them
 - They can practice through experience
 - They understand the “Why” and “How”
- **Effective preceptor communication facilitates learning**
 - Understand and respect your learner
 - Hands-on learning promotes critical thinking
 - Feedback goes both ways
- **Structured preceptor development can improve and promote new preceptor growth**
- **To develop a preceptor development plan, focus on:**
 - What to do
 - Needs assessment
 - How to do it
 - Mentorship
 - Educational activities
 - How to do it... better
 - Feedback

What Preceptor Actions Are Most Important To Foster Clinical Excellence And Professional Growth?



- Setting clear expectations early on
- Regular, honest, timely feedback
- Modeling first and then progressive independence
- Amiable personality to be able to approach preceptor for professional and personal advice

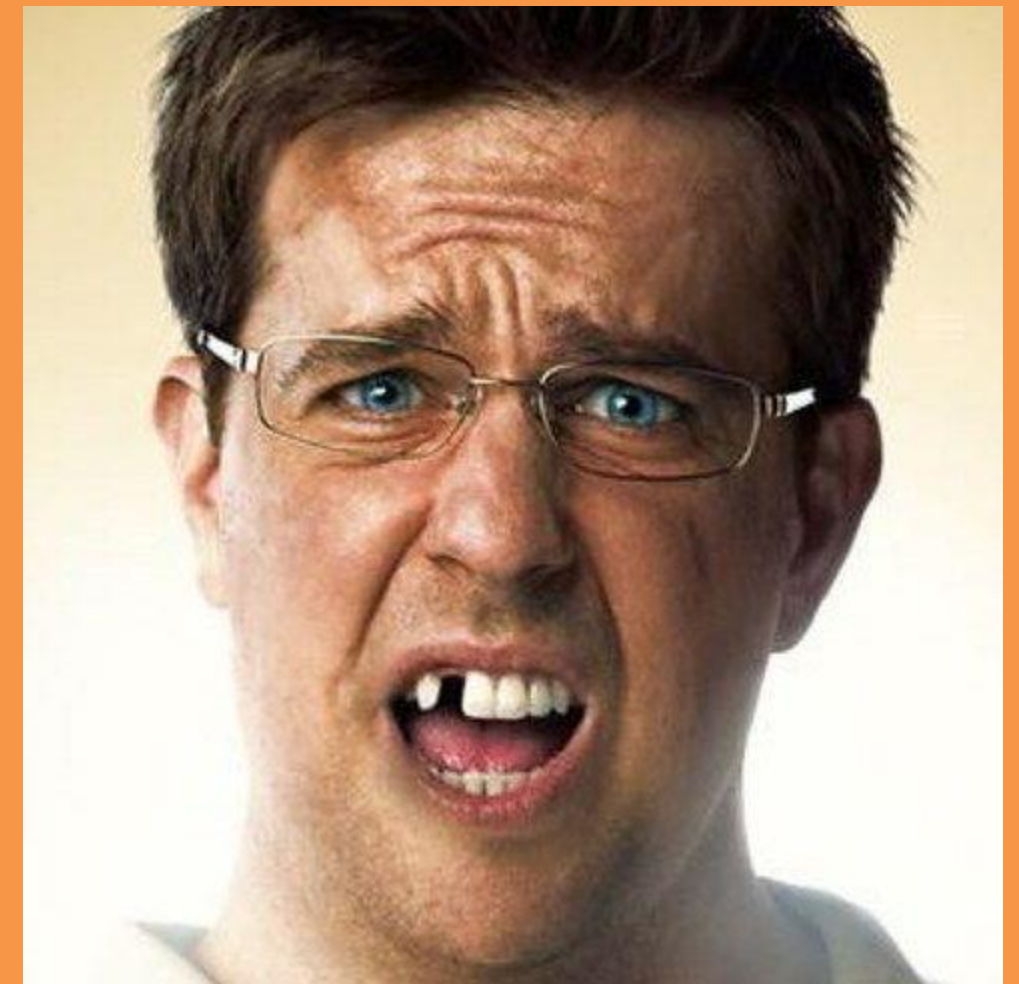
– Neda AbuGharbiyeh, PharmD

PGY2 Emergency Medicine Pharmacy Resident

What Preceptor Actions Are Most Important To Foster Clinical Excellence And Professional Growth?

“For me, the most important aspects were inclusion and encouragement. I was never made to feel that a question was too minor or that my excitement was something to be dimmed. I liked that topic discussions were interactive and normally applicable to patient care, and when something that I was interested in was happening within the department that I was notified and included.”

– **Jessie Lipstreuer, PharmD, BCEMP**
Emergency Medicine Clinical Pharmacist



What Preceptor Actions Are Most Important To Foster Clinical Excellence And Professional Growth?



“The thing that I have appreciated most about my mentors are that they seemed to be willing to be a mentor throughout every stage in my career. I always knew that I could reach out to share a cool patient case from the day, ask for advice on navigating a sticky situation, or to commiserate throughout the pandemic. The most important action my mentor took was sharing their genuine interest in the profession with me as a student. From then on, my goal was to be just like them!”

Cassie Schmitt, PharmD, BCEMP
Emergency Medicine Clinical Pharmacist

What Preceptor Actions Are Most Important To Foster Clinical Excellence And Professional Growth?

“The most important action to foster professional growth is a focus on the soft skills of clinical practice (the part they don't teach you in school). During the first few months as a new pharmacist, I had a hard time choosing which battles to fight. I knew the textbook answers and guideline-directed therapy and it frustrated me that medications could even be “provider preference” (there should be no preferences because there are no feelings in medicine!). My mentor explained that rigidity is not always best practice and showed me how to navigate difficult conversations with providers.”

Angela Lee, PharmD

Emergency Medicine Clinical Pharmacist



What Preceptor Actions Are Most Important To Foster Clinical Excellence And Professional Growth?



“My mentor is well known within the pharmacy world at the local, regional, and national levels. Seeing her vast involvement and commitment to propelling our profession forward really inspired me to pursue national leadership opportunities during my residency training.

As a brand-new pharmacist, I found myself asking basic questions at times (and often questioning everything, regardless of how small) during the beginning stages of my residency training- being in the “hot seat” as a newly licensed pharmacist can be intimidating. My mentor/preceptor was always available via text or call for urgent questions I had or if I wanted a second opinion. As a trusted and well experience pharmacist, I appreciated having her as a resource. ”

Kyle Schuchter, PharmD, BCEMP
Emergency Medicine Clinical Pharmacy Specialist

Audience Knowledge Check 2



1. Which choice below represents a key element to designing a structured preceptor development plan?

- A. What Do I Do (Needs Assessment)
- B. How Do I Do it (Activities)
- C. How Do I Do It Better (Feedback)
- D. All of the above

Audience Knowledge Check 2



1. Which choice below represents a key element to designing a structured preceptor development plan?

- A. **What Do I Do** (Needs Assessment)
- B. **How Do I Do It** (Activities)
- C. **How Do I Do It Better** (Feedback)
- D. All of the above

Case Study 2

You have just had your annual performance review. You completed a self-assessment of your preceptor needs, and your manager reviewed prior feedback from learners you have precepted. You recalled feeling like your rotational experience was a bit disorganized and learners indicated they did not feel set up for success during your rotation. You decide on a “Habit of Focus” of creating a positive learning environment for your learners for the upcoming year.

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S

• Specific

M

• Measurable

A

• Attainable

R

• Relevant

T

• Time-based

Create a SMART goal to help you develop this habit of focus.

Case Study 2

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What activities could you complete to help you meet your goal?

Case Study 2¹⁴

Domain	Preceptor Habits	Habit Level				Habit Level Achieved
		Developing Habits	Proficient Habits	Accomplished Habits	Master Habits	
2. Preceptor is an effective educator	2.1 Creates a positive learning environment	<input type="checkbox"/> Displays enthusiasm/passion for teaching and is approachable (e.g., friendly, supportive, willing to help). <input type="checkbox"/> Rotation experience is organized. Provides clear communication for all learning activities and rotation assignments (e.g., calendar of events with due dates, basic syllabus) at the beginning of the rotation. <input type="checkbox"/> <u>Occasionally</u> dedicates protected time for learners to answer questions, provide oversight, and give feedback. <input type="checkbox"/> Preceptor <u>occasionally</u> asks the learner to provide feedback on the learning experience and <u>considers</u> implementation that could better the rotation for future learners.	<input type="checkbox"/> Showcases a genuine interest in learner success (i.e., creates a welcoming environment each day despite personal or professional challenges that are present). <input type="checkbox"/> Facilitates a comprehensive orientation providing role clarity and establishing learner expectations. Ensures rotation is structured to allow learner achievement of program-specified goals & objectives. <input type="checkbox"/> <u>Frequently</u> dedicates protected time for learners to answer questions, provide oversight, and give feedback. <input type="checkbox"/> Preceptor <u>frequently</u> asks the learner to provide feedback on the learning experience and <u>considers</u> implementation that could better the rotation for future learners.	<input type="checkbox"/> Is dedicated to learners and is often viewed as a mentor/coach. <input type="checkbox"/> Provides learners with comprehensive syllabus (e.g., appropriate for level of learner from IPPE to APPE to resident, authentic to the roles & responsibilities of pharmacists practicing at this site) that is reflective of actual learning experience. <input type="checkbox"/> <u>Usually</u> dedicates protected time for learners to answer questions, provide oversight, and give feedback. <input type="checkbox"/> Preceptor <u>usually</u> asks the learner to provide feedback on the learning experience and <u>carefully considers</u> implementation that could better the rotation for future learners.	<input type="checkbox"/> Preceptor advocates for all learners at the site. <input type="checkbox"/> Rotation (including syllabus) has instructional alignment (i.e., learning objectives are congruent with learning activities and assessment methods) that ensures the essential elements of pharmacy practice are taught and assessed. <input type="checkbox"/> <u>Always</u> dedicates protected time for learners to answer questions, provide oversight, and give feedback. <input type="checkbox"/> Preceptor <u>always</u> asks the learner to provide feedback on the learning experience and <u>carefully considers</u> implementation that could better the rotation for future learners.	2.1 <input type="checkbox"/> Developing <input type="checkbox"/> Proficient <input type="checkbox"/> Accomplished <input type="checkbox"/> Master

Case Study 2¹⁴

SMART goal

- By the end of the residency year, evaluate and update my resident rotation structure (organization, activities, assignments, orientation checklist), rotation orientation plan, and preceptor – resident communication expectations to ensure they meet program-specific goals and objectives.

Activities to meet goal

- Confirm program-specific goals and objectives
- Evaluate learning environment at site
- Complete precepting course on aligning rotational objectives to learning criteria and activities
- Test proposed changes during upcoming rotations and seek feedback from learners and colleagues

Target outcome

- Goal date of completion
- Actual date of completion



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Thank You!

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