If you are viewing this course as a recorded course after the live webinar, you can use the scroll bar at the bottom of the player window to pause and navigate the course.

This handout is for reference only. It may not include content identical to the powerpoint. Any links included in the handout are current at the time of the live webinar, but are subject to change and may not be current at a later date.
Clinical Precepting: Shaping Future Colleagues

Jennifer Phelan, AuD
Lecturer/ Clinical Preceptor
Northwestern University Center for Audiology, Speech, Language, and Learning

Objectives

As a result of this course, participants will be able to:

• Describe the purpose and function of precepting and the role of the preceptor.
• Explain how to best help prepare for the precepting role while considering their own attributes.
• Explain how to implement techniques and strategies to ensure quality clinical and professional experiences for graduate clinicians, including giving effective feedback.
“No one was ever able to teach who was not able to learn.”
- Florence Nightingale

Background

• The concept of precepting is common in healthcare fields
• Most of the literature regarding precepting comes out of nursing
• Audiology preceptors can take advantage of the information from other fields and adapt it to our profession

WE DON’T HAVE TO RE-INVENT THE WHEEL! 😊
Stakeholders

• In the clinical education of audiology graduate students there are several stakeholders, including:
  • Graduate clinician
  • Clinical site
  • Clinician
  • Patient

What is a Preceptor?

• Simplest definition- Teacher, Tutor
• In reality, all preceptors have several roles
  • Facilitator- help student meet personal and course objectives
  • Teacher- provides instruction needed for student to grow as a clinician; able to provide answers to questions/ correct errors
  • Role Model- provide leadership and professional approach to practice
  • Nurturer- provides support and guidance
What is a Preceptor?

• Evaluator- provides valuable formative and summative feedback
• Resource- guides student to appropriate materials
• Monitor- sensitive to how student spends time without actually “patrolling”
• Socializer- assists with the student’s integration into the culture, politics and rules of the organization/agency

Preparing for Precepting: Consider your Facility

• What is the typical caseload/pace/complexity of your clinical setting- Can you support a student who is earlier in their education or is your setting better suited for a student later in their program?
• Do you work in a setting that has other precepting programs? (Do they have resources you can utilize?)
• What are your clinical demands work environment? Do they lend themselves to being able to effectively AND efficiently precept?
• What are the logistical issues you need to consider?
Preparing for Precepting:
Questions to consider

- Are you prepared to be an effective clinical educator?
- If you are actively precepting, are you maximizing your effectiveness?

“Successful teaching is a complex process that requires not only expertise in clinical content but also positive personal attributes.” (Burns, 2006)

Characteristics of Effective Preceptors
Self-Assessment

**Instructions:** First, read and rate yourself on each characteristic listed below (place an “x” in one of the four rating boxes). Then, for each characteristic rated at sometimes or never, develop an action plan for how you will practice in these areas.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Always</th>
<th>Usually</th>
<th>Sometimes</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is Organized and Focused</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I pre-plan precepting learning activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am prepared for precepting activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am on time for precepting activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I take the time to explain concepts fully and clearly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am careful and precise in answering questions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I summarize major learning points</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I focus on the identified learning objectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I identify what I consider most important</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Values Student-Preceptor Interactions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I encourage discussion</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I invite students to share knowledge, experiences, and opinions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I welcome and encourage questions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I use eye-contact with my students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I clarify thinking by identifying my reasons for questions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can tell if the student understands me or not</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have interest and concern in the quality of my precepting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I encourage active learning, that is, the students are involved and engaged rather than simply observing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Is Dynamic and Enthusiastic</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am enthusiastic about my professional responsibilities, including precepting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I vary the speed and tone of my voice</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I use humor appropriately with students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have an interesting style of presentation / teaching</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Characteristics of Effective Preceptors Self-Assessment

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Always</th>
<th>Usually</th>
<th>Sometimes</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relates Well to Students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have a genuine interest in students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I respect students as persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I attempt to relate to students as individuals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I adapt to the differences in individual students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am valued for advice beyond that directly related to the supervised practice experience</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am accessible to students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am approachable and friendly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uses an Analytical Approach</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I discuss recent developments in the field</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I discuss points of view other than my own</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I share the origins of my ideas and concepts</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I provide references for interesting and involved points</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I explain why the student’s work is correct or incorrect</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have students apply concepts to demonstrate understanding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I provide constructive and timely feedback</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Competent and Confident</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I demonstrate mastery in the area in which I am precepting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I keep up-to-date in the area in which I am precepting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am confident in my expertise in the area in which I am precepting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am confident in my skill as preceptor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Models Professional Behavior</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I show respect for others</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I demonstrate empathy for others</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I take responsibility for my actions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I recognize my own limitations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Preparing for Precepting: Know your strengths

- It is important to know your strengths so you can capitalize on them
  - Preceptors have many roles- Which ones are you already naturally strong in?

- Strength- Consistent, near perfect performance in an activity
  - =Talent + Knowledge + Skills
Preparing for Precepting: Emotional Intelligence

• Emotional Intelligence (EI): ability to recognize and understand emotions in yourself and others and your ability to use this awareness to manage your behavior and relationships
• EI skills outlined by Bradberry and Greaves (Emotional Intelligence 2.0)
  • Self-awareness
  • Self-management
  • Social awareness
  • Relationship management
• Why is this important in precepting?

Preparing for Precepting: Managing expectations

• We all have inherent expectations of the preceptor process (student, program, preceptor) the sooner we can identify our expectations the more effective we can be as preceptors
• One thing to consider is implicit bias
  • Our own implicit bias
  • Implicit bias of the student
Preparing for Precepting: Managing Expectations

Communal Traits
- Friendly
- Gentle
- Pleasant
- Cooperative
- Caregiving
- Sympathetic/Compassion
- Sensitive

Agentic Traits
- Strong
- Assertive
- Leadership
- Self-Confident
- Competent
- Competitive/Ambitious
- Independent

Clinical Considerations: Approaches to Precepting

- The goal of precepting is assist the student grow as a critical thinker with strong reasoning skills
- It is important to have an idea of how you approaches to precepting.
  - This helps in setting expectations for both yourself and the student

- Remember clinical education is very different from their traditional classroom coursework
  - Based on theories of adult education, the experiences graduate students are getting in the clinical setting is more aligned with principles of adult learning
Clinical Considerations: Adult learners

6 principles of adult learning

- Adults are internally motivated and self-directed
- Adults bring life experiences and knowledge to learning experiences
- Adults are goal oriented
- Adults are relevancy oriented
- Adults are practical
- Adult learners like to be respected

Clinical Considerations: Adult learners

<table>
<thead>
<tr>
<th>Pedagogy vs. Andragogy</th>
<th>Pedagogical</th>
<th>Andragogical</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Learner</td>
<td>The learner is dependent upon the instructor for all learning</td>
<td>The learner is self-directed</td>
</tr>
<tr>
<td></td>
<td>The teacher/instructor assumes full responsibility for what is taught and how it is learned</td>
<td>The learner is responsible for his/her own learning</td>
</tr>
<tr>
<td></td>
<td>The teacher/instructor evaluates learning</td>
<td>Self-evaluation is characteristic of this approach</td>
</tr>
<tr>
<td>Role of the Learner's Experience</td>
<td>The learner looks to the activity with little experience that could be tapped as a resource for learning</td>
<td>The learner brings a greater volume and quality of experience</td>
</tr>
<tr>
<td></td>
<td>The experience of the instructor is most influential</td>
<td>Adults are a rich resource for one another</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Different experiences assure diversity in groups of adults</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Experience becomes the source of self-identify</td>
</tr>
<tr>
<td>Readiness to Learn</td>
<td>Students are told what they have to learn in order to advance to the next level of mastery</td>
<td>Any change is likely to trigger a readiness to learn</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The need to know in order to perform more effectively in some aspect of one's life is important</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ability to assess gaps between where one is now and where one wants and needs to be</td>
</tr>
<tr>
<td>Orientation to Learning</td>
<td>Learning is a process of acquiring prescribed subject matter</td>
<td>Learners want to perform a task, solve a problem, live in a more satisfying way</td>
</tr>
<tr>
<td></td>
<td>Content units are sequenced according to the logic of the subject matter</td>
<td>Learning must have relevance to real-life tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Learning is organized around life/work situations rather than subject matter units</td>
</tr>
<tr>
<td>Motivation for Learning</td>
<td>Primarily motivated by external pressures, competition for grades, and the consequences of failure</td>
<td>Internal motivators: self-esteem, recognition, better quality of life, self-confidence, self-actualization</td>
</tr>
</tbody>
</table>
Clinical Considerations: Precepting Strategies

- Modeling with Focused Observation
- Student/Patient Matching
- Case Discussions/Presentations
- Assigned readings
- Direct Questioning
- Coaching

Clinical Considerations: Effective Questioning

- Bloom’s Taxonomy (1956)-classification system used to define and distinguish different levels of human cognition
- “Revised Bloom’s Taxonomy” (2001)- thought to better describe the cognitive processes by which thinkers encounter and work with knowledge
  - Remember- Recognizing, Recalling
  - Understand- Interpreting, Exemplifying, Classifying, Summarizing, Inferring, Comparing, Explaining
  - Apply- Executing, Implementing
  - Analyze- Differentiating, Organizing, Attributing
  - Evaluate- Checking, Critiquing
  - Create- Generating, Planning, Producing
Clinical Considerations: Effective Questioning

• “One Minute Preceptor” Method
  • Get a commitment
    • “What do you think is going on?”/ “What do you want to do.”
  • Probe for supporting evidence
    • “What led you to that conclusion?”
  • Teach general rules
    • “It is well established that...”/ “Many times when...”
  • Reinforce what was done right
    • “You did really well...”
  • Correct mistakes
    • “Next time that happens, try...”/ “A more efficient way...”

• “Think Aloud” Method
  • Student provides rationale to specific questions that are asked
  • Provide rationale for techniques used to explain how their conclusions were reached
  • Fosters critical thinking and reasoning skills
Clinical Considerations: Effective Questioning

• “Patient Witnessed Precepting”
• Components
  • Set expectations
  • Focus and respond to the student presentation
  • Mindfulness of the patient
  • Provide feedback and teaching to the student and patient
  • Wrap-up and summarize expectations

Professional Considerations: Impact of Precepting

• It is necessary to ensure that the demands on your practice are not hindered by precepting AND that you have the ability to meet the students needs
  • Prior planning is necessary to preceptorship success
  • Patient review time/ Discussion time will increase effectiveness of the experience
Professional Considerations: Impact of Precepting

• Precepting is a great opportunity to be connecting to an AuD program
  • Often they will offer CEU courses to preceptors
  • Students bring a level of excitement and enthusiasm
  • It can be easier to keep up with new developments in the field through precepting

Professional Considerations: Exposure for Graduate Clinicians

• Preceptor as “Socializer”
  • Precepting is a great time to consider an organizations on-boarding process
• It is important to consider the professional aspects of a preceptorship
  • What can the student learn about the dynamics of a clinical setting at your facility?
  • Each rotation gives students a unique opportunity to focus on their professional interactions as well as their clinical skills
  • Include professionalism topics in feedback sessions
    • Soliciting feedback from others in the office can provide important feedback
  • Encourage students not only to reflect on their clinical skills and growth, but to also consider professional topics such as interpersonal communication with others in the office
Professional Considerations:
Exposure for Graduate Clinicians

• Tips for incorporating professional growth in precepting:
  • Make students a part of your facility when they are there not just patient appointments
    • Include them in meetings if appropriate
    • Give them a sense of the clinic’s culture
      • What do people do over lunch
      • Is there a time during the day that people have small talk, etc.
  • Ensure students know clinic policies
  • Incorporate professionalism topics into feedback
  • Understand the developmental level of students
  • Don’t be afraid to engage in discussions on professional topics

Feedback:
Importance

• Feedback- specific information about the comparison between a student’s observed performance and a standard, given with the intent to improve their performance
  • Considered critical component to the precepting process— that backbone of the whole preceptorship
  • Important for a graduate clinician prior to their self-reflection

• Important to recognize the difference between feedback and evaluation
Feedback versus Evaluation

<table>
<thead>
<tr>
<th>Feedback</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Information</td>
<td>• Judgment</td>
</tr>
<tr>
<td>• Formative</td>
<td>• Summative</td>
</tr>
<tr>
<td>• Neutral</td>
<td>• Normative</td>
</tr>
<tr>
<td>• Focuses on specific instance/event</td>
<td>• Reflective of overall performance</td>
</tr>
<tr>
<td>• Frequent</td>
<td>• Given at a designated time (Intermittent)</td>
</tr>
</tbody>
</table>

Feedback:
Dimensions of Feedback

• Organization
• Interaction
• Impact
• Depth
Feedback: Principles of Good Feedback

- Aligns the goals of teacher and learner
- Is well-timed and expected
- Is based on first hand observation
- Is regulated in quantity and limited to remediable behavior
- Is phrased in descriptive, non-evaluative language
- Deals with specific performance
- Deals with decisions and actions rather than assumed intentions or interpretations

Feedback: Approaches

- Approaches to feedback that focus on self-assessment reflection foster trust
- Elaborative approach
  - Engages graduate clinician
  - Encourages reflection on their skills and performance
  - Using a set of standard questions helps the student acclimate to the process and can lead to deeper reflection
  - This is more effective than the directive approach where information about the encounter and observations are relayed to the graduate clinician without involving them in the feedback discussion
Feedback:
Strategies

• Providing timely and regular feedback
• Providing clear and focused feedback
• Emphasizing performance and progress
• Starting with positive and ending with areas of focus
• Respecting graduate clinician’s feelings and privacy
• Listen during feedback

Feedback:

<table>
<thead>
<tr>
<th>Table 2. Strategies and factors that affect the quality of feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment (setting)</td>
</tr>
<tr>
<td>• Neutral, private, setting</td>
</tr>
<tr>
<td>• Face-to-face</td>
</tr>
<tr>
<td>• Away from patient care; minimize interruptions</td>
</tr>
<tr>
<td>Timing</td>
</tr>
<tr>
<td>• Soon after observed behaviors</td>
</tr>
<tr>
<td>• Ongoing</td>
</tr>
<tr>
<td>• Easy digestible bites (limit to 20 minutes)</td>
</tr>
<tr>
<td>Individualization</td>
</tr>
<tr>
<td>• Establish preceptor–resident rapport and relationship</td>
</tr>
<tr>
<td>• Encourage self-assessment</td>
</tr>
<tr>
<td>• Brainstorm feasible solutions and suggestions for improvement</td>
</tr>
<tr>
<td>• Consider resident personality and strengths</td>
</tr>
<tr>
<td>Content</td>
</tr>
<tr>
<td>• Relevant observed behaviors</td>
</tr>
<tr>
<td>• Emphasize desirable behaviors</td>
</tr>
<tr>
<td>Specificity</td>
</tr>
<tr>
<td>• Specific examples</td>
</tr>
<tr>
<td>Preparation</td>
</tr>
<tr>
<td>• Pre-rotation meeting to review goals, objectives, performance expectations</td>
</tr>
<tr>
<td>• Establish routine feedback sessions</td>
</tr>
</tbody>
</table>
Feedback: Self-Reflection

• Self reflection is important for students to be engaged in their own learning and the feedback process
• Questions to encourage self-assessment and reflection
  • How do you think the recommendations went overall?
  • Do you agree with the feedback?
  • What do you think went well?
  • What are your areas of improvement?
  • How did I supported you?
  • What could I have done differently to improve or enhance your learning experience

Feedback: Self-Reflection

• Encourage students to have a formal way of self-reflection and assessment.
  • Having a process of writing about their clinical experiences allows for greater engagement
  • Often the process elicits more questions from the graduate clinician and adds to the preceptorship
  • Helps students continue to move towards andragogy
    • Instills concept of continual learning that is important in our profession
**Feedback:**

**Difficult Conversations**

- If a student is not progressing or meeting expectations they need to be made aware of your concerns
  - If you are uncomfortable with difficult conversations PRACTICE IS KEY!
- While feedback may not always take a formal approach it is especially important to rely on feedback strategies
  - Using strategies for progressing students is good practice for challenging situations
- Allow graduate clinicians an opportunity to show progress, but do not wait too long to inform their academic program about your concerns
  - Programs have the opportunity to discuss with students and determine what, if any, barriers are keeping them from their expected level of performance

**Anecdotes**

- Patient interactions
- Professionalism
- Difficult conversations
- Supporting different learning styles
Questions?

Thank you for joining me today!