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Getting Started as a New Preceptor

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Requests for Information

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Background

Clinical experience in the healthcare field plays a crucial role in shaping future professionals into competent and well-rounded providers. Equally important is the ability to facilitate the learning process of learners to promote self-directed, lifelong learning and critical thinking.¹⁻³ Preceptorship can vary in approach depending on the design of the learning experience: direct instruction, modeling, coaching, mentoring, and facilitation.⁴⁻⁶ In addition, there are many teaching tools available such as One-Minute Preceptor, layered teaching, providing reflections, and thinking out loud.⁷⁻⁹ To be an effective preceptor, developing skills through self-reflection and seeking out professional development to strengthen areas of weakness are important. However, despite all the precepting methods, tools, and resources available, how does one truly know they are effective and accomplishing their goals as a preceptor? Many individuals can think of what they want to achieve and how they want to be perceived as a preceptor, but few develop a plan of how to accomplish it.

Developing a Precepting Philosophy

Many novice preceptors may overlook formally developing a precepting philosophy, and some experienced preceptors may not realize their precepting philosophy changes over time. A precepting philosophy can provide a framework that can guide and structure learning experiences. A precepting philosophy can help you narrow down your precepting-related goals and inform the choices made about the type of precepting style you want to incorporate. Subsequently this can lead to directing the types of preceptor development to be most effective.

Questions to Consider as a Guide to Building your Framework

- What goals do you have for yourself to better align with your philosophy?
- What beliefs, theories, and methods will help you align better with your philosophy as a preceptor?
- How do you know you are being effective as a preceptor?
- How do you develop positive relationships with your students/residents?
- How do you create a supportive learning environment?
- What are you doing or not doing that you can change to better align with your framework?

Example of a Precepting Philosophy

To begin, reflect on some aspirational words or statements that drive you as a preceptor. Once you have the words, start building out your words into goals with objectives you can measure. This will become the skeleton for your philosophy of precepting. Once you have established your general philosophy, consider how your philosophy can be built into a framework that can guide you as a preceptor. This framework can then be used to evaluate all aspects of how you precept – how you develop your learning experiences, how you orient residents/students, and what preceptor development is required to reach your personal goals. This framework is your roadmap to fully embracing the preceptor you envision for yourself.

Let us explore a precepting philosophy of positivity, intention, and continuous growth. The aspirational words of positivity, intention, and growth are used to build a framework. The words reflect a personal desire to be a preceptor who establishes a positive environment, approaches each situation with intention, and strives to better oneself. In addition, these words capture what the goals are for the learners: to develop within themselves the skills needed to face situations with positivity, be self-directed, and to be life-long learners. We will break down each part of this philosophy by answering these two questions:

1. How do we implement this/ What does this look like in practice?

2. How do we evaluate the effectiveness of our precepting philosophy?

Positivity:

- One approach to implementing a positive environment is by having an optimistic attitude. We can display optimism by believing in ourselves, students, and patients. By having a “can-do” attitude, students can witness

their preceptor manage difficult situations and overcome challenging tasks. We can further create a positive environment by encouraging students and providing positive reinforcement with constructive feedback when necessary. This will enhance the student’s confidence and skills. We can evaluate our positive environment by witnessing our students’ progress, our students’ ability to take on new responsibilities, and our students’ evolving confidence when speaking with patients and making appropriate clinical recommendations.

Intention:

- Structuring all learning experiences with intention allows us to take into consideration the resident’s/student’s and the program’s goals so that no meaningless task consumes your learner’s time and efforts if a valuable outcome is not associated with it. We can implement this by creating activities and assignments that align with one or more of the following: 1) a goal for the learning experience, 2) part of the personal development plan of the learner, or 3) a need for the institution. We can assess our intention by evaluating the achievement of the end goal by the learner. If the intended goal was not met, then the activity may need to be restructured to accomplish the desired outcome.

Growth:

- Continuous improvement of oneself can be achieved by enhancing self-awareness through reflection. Utilizing self-awareness tools, discussing evaluations through self-reflection, and using monthly self-reflection journals can help strengthen our self-awareness. By taking the time to self-reflect, we can actively improve our skills and teaching strategies. We can also promote the growth of our learners by implementing reflections after presentations or activities

to encourage learners to identify their areas of improvement and better themselves. We can assess the learner’s improvement through self-reflection by witnessing their ability to evaluate their own progress without confirmation from others. Commonly utilized tools to develop self-awareness include *Strength Finders 2.0* by Tom Rath, the Myers-Briggs Type Indicator, and *Emotional Intelligence 2.0* by Travis Bradberry and Jean Greaves.¹⁰⁻¹²

This is an example of how a philosophy can be used as a guide to assess whether activities, teaching methods, and learning experiences are aligning with what you envisioned for yourself as a preceptor and the outcomes you want from your learner. A philosophy allows you to also assess for gaps in your precepting and areas needed for development.

Preceptor Roles

Once a precepting philosophy is established, preceptors should understand how to utilize four key roles to supplement their philosophy and assist with the development of students. The American Society of Health-System Pharmacists has identified these roles as direct instruction, modeling, coaching, and facilitation.⁶ The first role of direct instruction allows for the student/resident to gather the appropriate resources and gain background education before application of their knowledge. Once the preceptor believes the student/resident has the baseline knowledge of the topic, the preceptor can move onto the role of modeling. Modeling consists of “thinking out loud” and demonstration to allow the student to witness the thought process of completing the responsibility at hand. When you believe the student is ready to perform, the preceptor will progress to the role of coaching. Coaching allows for the preceptee to perform the task with direct feedback from the preceptor to guide them along the way. As soon

as the preceptor feels comfortable with the preceptee's skills, the preceptor will advance to the final role of facilitation, which allows for the student/resident to perform tasks independently with the preceptor available (if necessary). The rate of progression for roles will depend on the preceptee. If the learner struggles with the assigned tasks, they may be in the modeling or coaching phase longer before reaching facilitation. These roles allow the preceptee to improve their skills and progress to becoming independent practitioners.⁶

Providing Effective Feedback

Honest evaluations in experiential education are a part of our duty to the public, our profession, and to developing students.¹³ Our role as preceptors is essential in shaping practice-ready pharmacists who are about to step out into the world on their own. To strengthen

the student's skills, preceptors must be comfortable with providing direct feedback to allow for improvement. Typically, students are not aware of what they do not know and the gaps in their knowledge, which may lead to poor habits, behaviors, and poor clinical decision-making that may continue if the learner is not properly guided. Feedback can be delivered in a variety of ways depending on the situation. This includes positive or constructive feedback, verbal feedback (on the spot or written), and summative or formative feedback.^{13,14} All methods of feedback are necessary and useful for learners of all levels. Regardless of the approach utilized, feedback should be direct, consistent, constructive, timely, specific, and reflective to be most effective.¹³⁻¹⁵

Providing regular feedback starts to come naturally with time and experience as a preceptor. These tips are a brief introduction to the broad topic of feedback

Additional resources include *Getting Started as a Pharmacy Preceptor* and *The Preceptor's Handbook for Pharmacists*.^{12,14}

Pearls to Precepting Scenarios

Experiences from other preceptors can provide valuable insight to dealing with various types of learners. With every set of new students and residents that are being precepted, we learn more about ourselves and become better preceptors. Much of what we learn comes not only from positive experiences, but challenges we face along the way. Many of us may face similar pitfalls throughout our careers as preceptors. Knowing how to navigate common precepting challenges and scenarios may be beneficial to new preceptors.

Precepting is a privilege and opportunity to give back to junior colleagues and developing students. Creating a precepting philosophy is an important step to becoming an effective preceptor. By identifying who we want to be as a preceptor, what outcomes we want for our learners, navigating common challenges, and learning from experiences of our own and others, we can adequately guide our students to success. The preceptor-preceptee relationship may flourish into a mentorship which is rewarding for both individuals involved. ○

Table 1. Characteristics of Effective Feedback

Type of Feedback	Important Clinical Pearl(s)
Direct	Be honest and straightforward with feedback given to students. They should be aware of areas and items they excel in and areas that need improvement.
Consistent	Create a habit to provide consistent feedback throughout the rotation. Providing feedback once or twice during a rotation does not promote continuous growth.
Constructive	The feedback students receive should serve the purpose of building the student up, not breaking them down. When students perform poorly, their actions should be discussed and how it can be improved moving forward. Avoid commenting on personality and other personal factors.
Timely	Feedback given immediately after an activity is most beneficial as they can immediately recall what occurred. If too much time lapses between the event and the feedback, neither you and the student may not remember the details nor is the student given the opportunity to improve.
Specific	Provide concrete details of what the learner did well on and what they need to work on. Vague feedback leaves room for misinterpretation of the situation.
Reflection	Teaching and encouraging self-reflection will lead to a better ability to receive and provide effective feedback. Reflection closes the evaluation loop by providing the opportunity for students to critique themselves and analyze the situation.
Examples of Strong Feedback	<p>Preceptor to student: "How do you think the patient encounter went? What are areas you can continue to work on?"</p> <p>Preceptor to student after response: "I was impressed by your knowledge of the agents used to control diabetes. However, when explaining the importance of adherence with the patient, make sure to stay consistent with using lay language. The patient seemed confused when you mentioned preventing microvascular complications."</p>

Table 2. Pearls for Common Precepting Scenarios

Scenario	Pearl	Explanation
Having one high-achieving student and one struggling student during the same rotation	Avoid a similar approach with both students	A high-achieving student can be given more autonomy and additional responsibilities (eg, updating a protocol, presenting an in-service, or being more independent with patient care). The struggling student may benefit from achieving the goals of the rotation with more modeling and coaching. Another strategy to consider is a paired teacher approach between the two students, where one student teaches the other and then vice-versa. However, relying heavily on the stronger student to consistently provide guidance to the struggling student may also cause unnecessary stress to the stronger student. Ensuring all stated objectives of the learning experience are met by both students and creating some individualized learning strategies will make for a more enriching experience. Approaching both students similarly may be a disservice to one of them.
Teaching activities throughout the rotation	Be creative	Experiment with adding variety to teaching activities to make the experience more enjoyable and to expose students to other styles of teaching. For example, try having the students lead a discussion at their own discretion, incorporate games such as Jeopardy!, provide complex cases to stimulate discussion, bring in other preceptors that are an expert in their field to provide real-life examples of their experience, allow students to critique journal articles, show videos, have students role play complicated scenarios, etc. These are various approaches to promote student learning and critical thinking. Creativity allows preceptors to discover a teaching style best suited to their precepting philosophy.
Students not progressing to the preceptor's rotation objectives	Identify the gap(s) in knowledge or skills and help the student progress	Certain expectations of our students can become shaped by our work with previous students. Try not to allow past experiences with students good or bad influence your beliefs to compare students with each other. Learn about your current student and understand how to help them overcome challenges to meet the desired learning objectives. Breaking down the objective into smaller achievable goals and providing more time for the student to work on the tasks may assist with improving their skills in a stepwise manner to meet the overall objective. Understanding the student's gap(s) in knowledge/skill will guide preceptors in choosing the appropriate preceptor role to better help the student progress.
Dealing with an unprofessional student	Be firm and seek additional resources	Be firm with the unprofessional student. Communicate with the school and seek advice and support. Punishing the student or retaliation should be avoided in these situations. Unprofessional conduct should be addressed at the root of the problem to avoid recurrence in the future. Problems with professionalism may stem from lack of awareness, knowledge, or the proper tools on how to deal with a certain situation. The school should be made aware of the situation and they may provide additional guidance to navigating challenges. Other seasoned colleagues may also provide an alternative perspective that may have never been considered on your own. This allows for preceptors to share and problem-solve together, which can strengthen precepting skills. Throughout this process, document what occurred and the feedback provided to the student.
Your student has difficulty with responding to questions during their presentation	Avoid providing little to no direction or feedback when preparing the student	To better prepare the student, listen to the presentation beforehand, provide specific feedback regarding presentation style and content, give examples of questions that may be asked, and have them ask themselves these three questions: 1) what are key takeaways 2) what may be unclear, and 3) what questions may be asked. This will help them get a deeper understanding of the material and better prepare.
Asking the student to participate in a task, meeting or project that does not contribute to an end goal prespecified by your philosophy or syllabus	Avoid assigning tasks that lack authenticity	This goes back to providing opportunities with intention. Ensure the student/resident is investing their time in an activity that will contribute to their development, goals or the institution's needs. If there is value in the task assigned, providing an explanation for the need and the goals of the task may help the student understand the purpose and desired outcome of the duty.
Your relationship with your preceptee	Create a positive environment for learning	All preceptors have a different approach to teaching and precepting. Regardless of the teaching style, it is important to create an environment that encourages growth and critical thinking. As preceptors, we must find a balance to avoid being too controlling, too friendly or too relaxed to allow the student to become independent with enough guidance to be on the right track. For example, we can allow a student to use their creativity when it comes to creating a presentation without telling the student exactly what to say or include. Feedback can be provided after their first draft of their presentation. If we as preceptors tell them how complete every task, it takes away from their experience and they may struggle with navigating issues, managing their time, or problem solving in the future.

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