

Clinical Teaching Skills

For Community-Based Preceptors





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DMU Faculty Development Office
3200 Grand Avenue, Des Moines, IA 50312

Printed February 2013

Table of Contents

Preface	2
A. What is an effective clinical teacher?	3
B. How do we learn?	
1. The Learning Cycle	5
2. Using the learning cycle to your advantage	6
C. Preparing to teach	
1. Prepare your office	8
2. Prepare your patients	9
3. Prepare yourself	10
4. Prepare an educational plan.....	10
D. Teaching with patients	
1. Provide a variety of active learning opportunities	14
2. Focus on clinical reasoning	14
3. Use a variety of teaching techniques	
a. Ask questions.....	16
b. Try the “One Minute Preceptor”	18
c. Teach procedural skills	19
E. Observation, feedback & assessment	
1. Observation and providing feedback.....	21
2. Assessment	24
F. What to do with challenging learners?.....	26
G. Acknowledgements and more information	28
Clinical teaching survival guide	29
Competency Teaching Checklist for Clinicians	30

Preface


As members of a profession, we are entrusted with a responsibility to continuously renew our ranks by educating our future clinical colleagues. Despite the many challenges, we have a professional duty to teach young physicians.

If you are a practicing physician you may have the opportunity to accept a medical student or a post-graduate resident into your busy practice. Naturally, this request may raise a number of questions such as:

- *Why me?*
- *What can I teach?*
- *How do I teach it?*
- *How can I learn to teach it?*

Relax. You have not been asked to stand before a classroom or grade exams. You have been asked to share what you do every day in your clinical practice with a learner – to serve as a preceptor. A preceptor is a role model who can supervise, guide and facilitate the learning of a student. Whether you have been working as a preceptor for many years, or just contemplating trying it out, you may have some questions about your role as a clinical teacher.

This modified booklet was developed by physicians in the Office for Faculty Development and Educational Support in the Faculty of Medicine at the University of British Columbia to help clinical educators teach more effectively in the clinical setting. The terms *students*, *learners* and *residents* are inclusive terms and can be used interchangeably, depending on the individual circumstances.



While this booklet has been written primarily for teaching physicians, it is recognized that other health care professionals deal with the same clinical teaching and learning issues. Feel free to adapt the suggestions to your own profession and working environment. The booklet will introduce you to key concepts in teaching and learning and help you prepare for your role as a clinical teacher. If you are pressed for time, try flipping through the **Quick Tips** that are highlighted throughout the booklet for a brief overview of important teaching points and practices.

Good luck and enjoy!

A. What is an effective clinical teacher?

Can you recall someone who had a significant impact on your clinical training? How would you describe that person and why do they stand out in your memory? Effective clinical teachers have well identified roles and characteristics. Let's start by looking at the roles and the characteristics of excellent teachers.

1. Physician

Great clinical teachers are role models as physicians. They are knowledgeable and competent in their fields, demonstrate strong interpersonal communication skills, work effectively in a team and serve as role models. Such a teacher demonstrates a positive attitude to patients and to their own career.

2. Teacher

Excellent clinical teachers are those who are interested in teaching and learning. They spend time with learners, explain things and answer questions. They are well organized and prepared to have learners in their clinical setting. They facilitate the students' learning and focus on the students' clinical reasoning skills.

3. Supervisor

As a supervisor, an excellent clinical teacher provides direction and timely feedback as responsibility is delegated and learners are involved in management. The learners feel like they are part of the health care team.

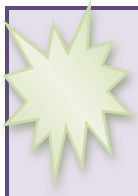
4. Person

Finally, outstanding clinical teachers are accessible, enthusiastic, supportive and positive individuals. Learners look forward to working with these teachers because they value and respect learners as individuals and they create an enjoyable and positive work environment.

What makes these types of teachers effective is that they motivate learners to learn and to improve their clinical performance.

Effective teachers inspire rather than inform!

“Who” they are and “how” they teach is often more important than “what” they teach.



Effective Clinical Teachers...

- ...provide opportunities for learners to participate in patient care;
- ...teach specific content and skills;
- ...delegate specific tasks to the learner;
- ...are available to answer questions;
- ...observe the learner;
- ...provide timely, constructive feedback;
- ...provide a friendly, supportive learning environment;
- ...influence and inspire.

References:

Wright S, Carrese J. Excellence in role modeling: insight and perspectives from the pros. CMAJ 2002; 167:638-643.

Paukert JL, Richards BF. How medical students and residents describe the roles and characteristics of their influential clinical teachers. Acad Med 2000; 75:843-5.

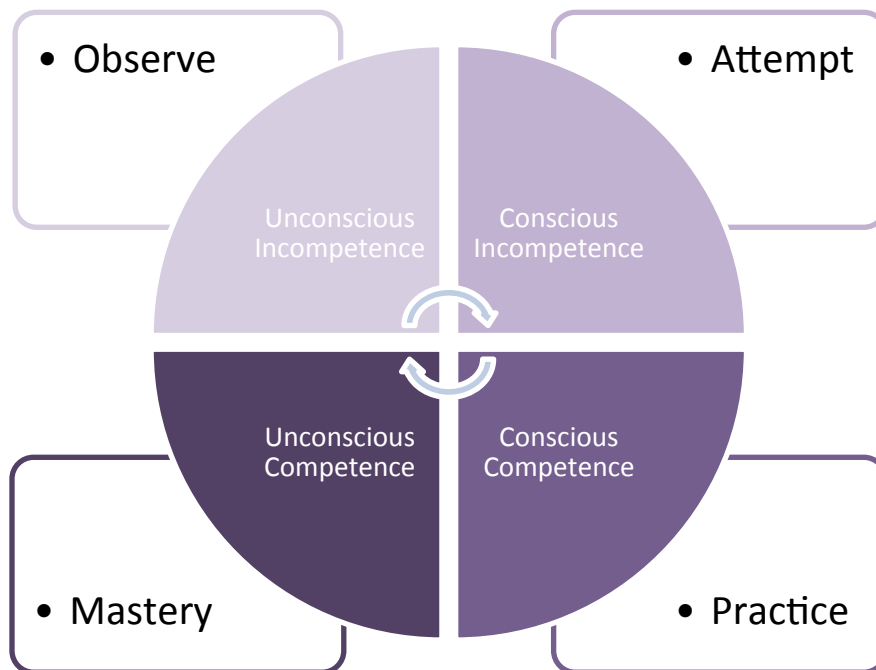
B. How do we learn?

[Adapted from *Teaching and Learning in Medical Practice*. Peyton, J.W. 1998.]

It may help to understand why “how” we teach is more important than “what” we teach if we explore a model on how adults learn in the clinical setting. In the same way that clinicians apply knowledge of basic sciences to solve clinical problems, understanding the basic principles of adult learning is helpful to clinical teachers.

1. The learning cycle

The following is a competency based model of learning that has been applied to many learning situations. It helps to outline the different stages adults move through as they gain mastery in a subject or a skill.



Let's take a clinical example to demonstrate how this can be used in clinical teaching – [learning to intubate](#):

1. Learners *observe* the physician performing a procedure – in this case, intubating patients – and begin to feel they could easily do the procedure themselves. At this point, learners are **unconsciously incompetent**.

2. Given the opportunity to *attempt* to do the procedure, they realize that it may not be as easy as it initially seemed. Where exactly is the larynx? The learners are now **consciously incompetent** – they have perceived the learning need and are now motivated to learn so that they can properly perform the procedure.
3. With *practice*, learners refine their technique until they are competent. At this stage learners are still focused on every step of the procedure. Mentally rehearsing the procedure before performing it is often helpful to learners. They may engage in background reading, such as reviewing the anatomy of the neck, to help improve their performance. Learners are now **consciously competent**. Observation of learners by a teacher with timely and appropriate feedback will help learners to reach this stage more easily than if learners are left to learn on their own.
4. Finally, learners stop thinking about every step of the procedure and perform the procedure based primarily on their practical experience rather than by their textbook knowledge. Learners are now **unconsciously competent** – literally they can do it without thinking. All independent physicians should reach this stage of *mastery*!

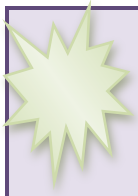
Over time, physicians tend to forget the theoretical principles and steps behind each procedure – they just do it. At this point, they may find it difficult to explain to someone at the early stages of the learning cycle how to do the procedure. Learners who are consciously competent are often very good teachers because they are able to explain the steps involved in a procedure or in clinical reasoning to learners who are still struggling with the skill.

2. Using the learning cycle to your advantage

Learners need to do things! Mistakes will and should occur. Learners must feel empowered to acknowledge their lack of knowledge or skill.

Learners must feel comfortable making and discussing their mistakes. If mistakes occur in a supportive learning environment, the learners will be able to acknowledge their limitations and will likely be receptive to constructive feedback which will ultimately improve their performance. In an unsupportive learning environment, learners are likely to keep mistakes to themselves and avoid situations in which they feel incompetent. Unsupportive learning environments hinder further learning.

Teachers need to observe all learners and provide critical, yet constructive, feedback so that learners can continue to improve their clinical performance.



Adult Learning Should Be...

- ...Active, where adult learners need to be actively involved in their learning in order for them to develop their learning needs.
- ...In context, where adults are motivated to obtain the necessary knowledge and skills to solve specific problems.
- ...Reflective, where adults learn from prior experience and generalize these experiences to new situations.
- ...Practical, where adults learn by doing.

References:

Peyton JWR, ed. Teaching & Learning in Medical Practice. Rickmansworth, UK: Manticore Europe, Ltd. 1998.

Kaufman DM. ABC of learning and teaching in medicine: Applying educational theory in practice. BMJ 2003; 326:213-216.

C. Preparing to teach

1. Preparing your office

Your colleagues and office staff will need to be aware that you will have a learner in your office. Notify staff well in advance and ask for their active participation in orienting and teaching the student. Explain why it is important for you to have a learner and ask for their support. The learner’s first day in your office should not begin with surprise or confusion from the office staff.

Some physicians find it helpful to alter their schedule when learners are present in the office. The ‘wave’ schedule allows you to continue to see patients while the learner takes somewhat longer to undertake their assessment. *The following is adapted from Lesky & Hershmann (1995):*

The WAVE Office Schedule			
Time	Appointments	Preceptor	Student
0900	Patient A Patient B	Patient A	Patient B
0915	Patient C	Patient C	
0930		Patient B <i>Together</i>	
0945	Patient D Patient E	Patient D	Patient E
1000	Patient F	Patient F	
1015		Patient E <i>Together</i>	
1030	Patient G Patient H	Patient G	Patient H

It will be much easier if there is a spare examination room for the learner to see patients alone. If you don’t have an extra examination room, the learner could initiate the visit with one or two patients in each hour. You can plan to use this waiting time for paperwork, phone calls, etc.

2. Prepare your patients

Notify your patients beforehand, if at all possible, that a learner will be in your office. Ask your staff to inform patients when they make their appointments or when they arrive in the office. Have a sign in the office announcing the presence of a learner (example below). Ask patients for permission to involve a student in their care and thank patients at the end of their visit.

Sample office signage



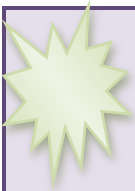
This practice serves as a teaching site for medical students from
Des Moines University – College of Osteopathic Medicine
As a patient of this practice, you are helping educate future doctors
in the skills necessary to be competent and caring physicians.

Thank you!

Mary A. Smith, D.O.
Practice Medical Director/Physician

If a learner will be in your practice setting for several weeks or months, consider preparing a brief letter of introduction for your patients, with a sketch of the learner's prior training and current program. This letter can be handed to patients prior to their visit with the learner, or posted in the examining room.

Most patients are quite happy to be involved when medical students or residents are present in the office. Some patients appreciate the extra attention or fresh approach to their medical concerns.



Involve Your Patients...

- ...Don't surprise a patient with a learner.
- ...Introduce learners to your patients formally.
- ...Select patients that are appropriate and receptive to involving a learner. Appropriate patients for new learners are those with straightforward and/or common problems, and friendly patients who are good communicators.
- ...Involve the patient in teaching by encouraging the patient to provide feedback to the student. For example, a patient can tell better than anyone if the student is using the same technique as the preceptor to palpate a joint or prostatic nodule.
- ...Thank patients for involving learners in their care.

Patients need to be reassured that you are still in charge of their care, aware of their health concerns and available to them directly, if they request time with you. If you have an advanced learner or resident in your practice, it is important to stay in touch with the patient, even though the resident is conducting most of the visit(s).

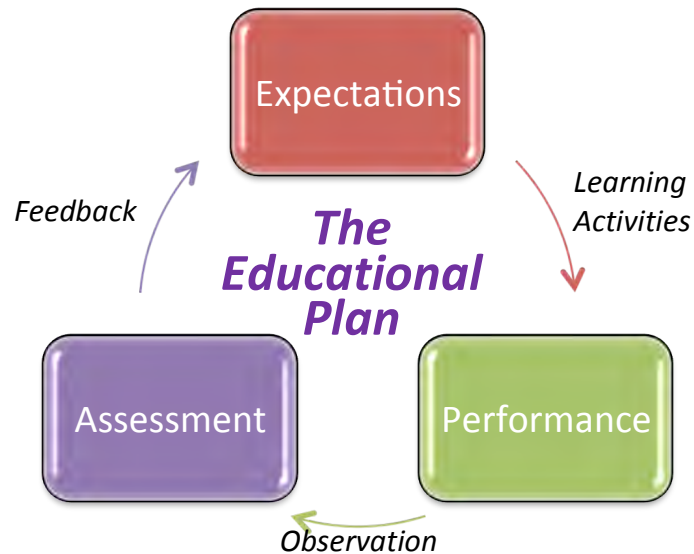
3. Prepare yourself

What is the reason you have been asked to have a learner in your clinical setting? Specific knowledge and skills are expected to be obtained through working with you and the learner will provide you with the specific educational objectives for their clinical rotation.

4. Prepare an educational plan

Take a few minutes to meet with the learner and together develop an educational plan. An educational plan will outline aims and expectations, identify learning opportunities and establish the basis for ongoing review.

Preparing a plan, either formally or informally, can be incorporated into the learners' orientation to your practice.



Orientation...

Introduce Yourself, Students/Residents, Hospital/Community

- Your practice and usual weekly schedule
- Specific schedule issues during the rotation (on call, remote clinics, days off, weekends, etc.)
- Knowledge and skill level of individuals or the team
- Experience of individuals or the team
- Professional and personal interests
- What is available or not; e.g., OB, labs and X-ray

Expectations

- Learning objectives from the physician and the learner
- Potential learning activities for the objectives
- Responsibilities in the clinical office and other clinical settings
- Attendance, dress, conduct, other professional requirements

Practical issues

- Weekly time table
- Transportation and housing
- Hospital, office and/or agency orientation

What are the expectations?

The first step is to clarify what the learner, the preceptor and the medical school expect from the community based clinical experience.

You will need to find out about the learners – their background knowledge and clinical experience in your area. Ask specifically about their clinical skills – what have they had the opportunity to do and how comfortable do they feel with their skill level? Inquire about their specific wants and needs in their upcoming experience with you. Ask learners if they have specific learning objectives that they would like to focus on, for example, well-baby examinations.

Then describe your practice and outline your professional expectations with regard to office and hospital conduct, time commitment and learner participation. Review the educational objectives provided by the Office of Clinical Affairs. Most of the time, these objectives are described in terms of **Knowledge, Skills** and **Professional Behavior**. The assessment criteria for these objectives, usually an assessment form, can also be reviewed by both preceptor and learner at this time.

How will these expectations be met?

These learning objectives can be met through a number of formal and informal activities available to the learner. In the clinical setting many of these objectives will be met by participating in patient care. Other learning opportunities may include lectures, directed reading and research, chart reviews and participation in small group learning or seminars. Some community based preceptors have found it helpful to develop a list of other potential learning experiences as a guide.

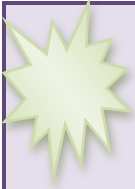
Based on your educational plan, you can outline who the learners will see, what they will do, and what they should focus on with each patient encounter. Be specific, for example:

“Today we have several pregnant patients so I would like you to learn how to assess maternal well-being. You will interview each patient, fill in their prenatal form and measure their fundal height.”

Residents may be more autonomous or self-directed than medical students. However it is still important to observe and monitor residents as well, especially in the early part of their rotation, and delegate an increasing level of responsibility when appropriate.

How will we know when these expectations are met?

The educational plan will evolve over time, as expectations are met and new goals established. See Part E – Observation, Feedback and Assessment, starting on page 28.



Give the Learner (& Yourself) a Break...

1. You do not need to be the only clinical teacher.
2. A learner at different stages in her/his training can learn from other health care professionals.
3. These activities can present general and specific learning opportunities:
 - Learners can spend time with a public health nurse to gain general exposure in health promotion and disease prevention and specific experience in well-baby checks.
 - Another opportunity for a learner is to work with an optometrist for general experience in ocular health and specific opportunities to see a range of normal and abnormal fundi.

References:

Gordon J. ABC of learning and teaching in medicine: one to one teaching and feedback. *BMJ* 2003; 326:543-5.

Hays R. *Practice-based teaching: a guide for general practitioners*. Emerald, Australia: Eruditions Publishing, 1999.

Lesky LG, Hershman WY. Practical approaches to a major educational challenge. Training students in the ambulatory setting. *Arch Intern Med* 1995; 155:897-904

Rourke J, Rourke LL. Practical tips for rural family physicians teaching residents. *Canadian Journal of Rural Medicine* 1996; 1:63-9.

D. Teaching with patients

As stated before, most of the learning activities in the community setting will involve teaching with patients. What can you do to optimize these patient encounters?

1. Provide a variety of active learning opportunities

Learners will want to see and interact with patients and feel like they are a legitimate part of the health care team. There are different ways to involve students and you should strive towards giving the student more responsibility as their experience increases. Try any of the following techniques:

Shadowing or Sitting-in

Limit the use of this as the learner progresses, unless there is something very specific you wish to demonstrate.

“This baby is here with diaper rash. I’d like you to see how I like to incorporate a brief developmental screen into the consultation.”

Joint consultation

“This man is here with a new back injury. Why don’t I start the history and we will examine his back and extremities together?”

Independent consultation with joint review

“Mrs. Jones has brought her eight year-old in today with a fever. Take the next 10 to 15 minutes to do a focused history and examination. We can review your diagnosis and management plan and then see the child together.”

Observed consultation – all or part

“Mr. Smith is here with back pain. I would like to observe how you take his history.”

2. Focus on clinical reasoning

Medical knowledge and clinical reasoning are two interdependent essentials in the development of clinical judgment. Clinical preceptors have the unparalleled opportunity to guide students through the thinking process of medical decision-making. A framework for decision-making can be built around the basic steps involved in the clinical (diagnostic and therapeutic) reasoning process.

First, the learner systematically gathers information, the clinical history and physical examination, and then analyzes this information in a logical manner. The teacher can use questions to guide the student through **The Diagnostic Reasoning** process.

For example, if a patient reports having blurred vision the guiding questions may look like the following:

Steps in Diagnostic Reasoning	Guiding Questions
First, the student attempts to define the anatomical and/or physiological process at work	“What causes blurred vision? Think about how visual images are processed starting with the eye...”
Secondly, the student should construct a differential diagnosis.	“Now that we have gone through the normal physiology, can you think of where things might go wrong?”
Thirdly, the student needs to consider what investigations may be needed to support clinical diagnosis.	“What specific investigations (blood, urine, radiological studies, etc.) may be helpful to narrow the diagnosis?”
Finally, all of the factors from history, physical examination and investigations are considered in order to arrive at a provisional or working diagnosis.	“What factors from the history support your diagnosis?” “Given all of your information what is your working diagnosis?”

Therapeutic reasoning is also an important part of decision making. The steps involved are the same ones that we as physicians use when we are obtaining informed consent for a medical course of action and/or procedure. When we ask a learner to recommend a course of management for a patient they should be able to discuss:

Steps in Therapeutic Reasoning	Guiding Questions
The student attempts to define the natural history of the condition.	“What is likely to happen without any treatment?”
The student should be able to come up with a range of interventions.	“What are the options for treatment?”
Now the student needs to weigh the risks, benefits and likelihood of success for each option.	“How will that benefit the patient?” “What are the possible risks?” “Do you need to take anything else into consideration?”
The student recommends a management plan.	“Considering all these factors, what is your recommendation for this patient?”

Clinical reasoning is the fundamental skill of clinical practice and clinical teaching.

3. Use a variety of teaching techniques

There are many different teaching techniques and styles. Effective teachers use techniques that engage the learner in the thinking and reasoning process. You may already do some of these unconsciously. By familiarizing yourself with several other techniques, you can apply the most appropriate method to the learning situation.

a. Ask Questions

Effective use of questions is a requisite skill of teaching and provides many opportunities for learning. The structure (open vs. closed) and type of question employed can stimulate different levels of understanding by the student.

Types of questions:

1. What does the learner know?

Knowledge-based questions determine the level of knowledge and stimulate recall and activation of previous information. They can usually be answered with a single word, a phrase or lists:

“What are the most common organisms causing acute otitis media?”

“What is the role of Vitamin B12 in erythropoiesis?”

2. How does the learner use their knowledge?

Application/integration questions stimulate application of knowledge:

“What kind of anemia do you see in Vitamin B12 deficiency? Why?”

“What are the signs that may indicate heart failure as a possible cause for his shortness of breath?”

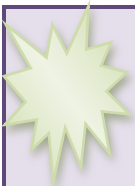
3. How does the learner solve a problem?

Reasoning/problem-solving questions stimulate thinking and reasoning. Questions are asked as a case scenario and are often introduced by the prefix “what if”. The preceptor can use clinical experience to bring in practical issues:

“What are your options for management if Mrs. Brown has megaloblasts in her peripheral blood smear?”

“What if Mr. Lim has both this skin rash and arthralgia?”

Clinical teachers are the experts at integration and reasoning, so use these questions to your advantage. The clinical setting is the perfect environment to demonstrate how clinical knowledge is used to solve clinical problems. It may not be the best place to teach clinical knowledge in itself.



Asking Questions...

- Ask the right type of question for the learning objective – basic knowledge, application and/or clinical reasoning.
- Application and reasoning questions facilitate a deeper level of understanding in the learner.
- Take advantage of the clinical setting by encouraging use of knowledge rather than testing knowledge itself.

b. Try the “One Minute Preceptor” *[Adapted from Neher et al, see references]*

The One Minute Preceptor is a model for clinical teaching developed by family practice preceptors. It is designed to promote clinical reasoning and decision making skills. It also reminds the teacher to teach around patients and provide feedback to learners. Following the presentation of a patient’s case by the learner, the preceptor guides the learner through these five steps:

1. Engage and get a commitment

Ask the learner to give her/his opinion of the case. This requires the preceptor to ensure a safe, trusting learning climate:

“What is your diagnosis?”

“What is your recommended treatment?”

2. Probe for reasoning and supporting evidence

The learner should be able to give reasons for her/his opinion:

“What factors in the history and examination led you to that opinion?”

“What do you expect the result of that treatment to be?”

3. Teach general rules

Avoid lengthy discussions about atypical or individual cases. Try to pull out the key message from each case and avoid trying to teach an entire topic. For example, if you have just seen a patient with GERD, you may choose to limit your discussion to the diagnostic work-up. Teach around any knowledge gaps and allow the learner to extrapolate to other situations:

“In general, a diagnosis of hypertension requires several elevated BP readings.”

“A lateral C-Spine x-ray is mandatory for everyone who is intoxicated and has mild or moderate trauma.”

4. Reinforce what was done right

Focus on specific skills or behavior, not just general praise:

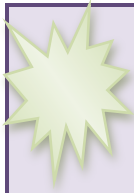
“Your presentation to the patient was well organized. You described both the expectations and risks of treatment.”

“You have a very good grasp of the steps of that procedure.”

5. Correct mistakes

Ask the learner to evaluate their performance and then provide specific, constructive feedback:

“I agree that you rushed into treatment options before carefully considering other potential diagnoses. It may be helpful to take a minute to review your history before focusing on one specific clinical sign.”



Teachable Moment...

- Each patient's case discussion is a stepping stone for sharing practical tips and advice about clinical care.

c. Teach Procedural Skills

Teaching students and residents procedural skills can be enjoyable. Teaching procedures requires some planning, even for straightforward tasks. All procedures are made up of a series of sequential steps that have a start and an end point. The instructor can identify these steps before starting to teach the procedure. Effective teaching can follow three basic steps:

1. Cognitive

- EXPLAIN to the learner why and when (indication) the procedure is done
- DEMONSTRATE with a step-by-step, talk-aloud description
- Learner ARTICULATES a cognitive rehearsal of the steps of the procedure

2. Guided practice (supervision)

- REVIEW the procedure beforehand
- OBSERVE the procedure
- Provide GUIDANCE and feedback
- Allow the learner to PRACTICE the procedure

3. Independent practice

- Provide opportunities for the learner to PRACTICE the procedure
- ENCOURAGE self-assessment
- Be available for SUPPORT



Supervise progress, but avoid 'taking over' when the learner is still comfortable completing a task unless you feel patient safety is in jeopardy.

Educational circumstances vary widely from a formal teaching laboratory to the opportunistic, patient-based, one-time incident in the office or clinic. Wherever necessary, both learner and instructor can adapt these key principles to ensure that procedures are efficiently learned and practiced to minimize patient risk.

References:

McLeod PJ, Steinert Y, Trudel J, Gottesman R. Seven Principles for Teaching Procedural and Technical Skills. *Academic Medicine* 2001; 76:1080.

Neher JO, Gordon KC, Meyer B, Stevens N. A five-step “microskills” model of clinical teaching. *J Am Board Fam Pract* 1992; 5:419-24.

Spencer J. ABC of learning and teaching in medicine: Learning and teaching in the clinical environment. *BMJ* 2003; 326:591-594.

E. Observation, feedback and assessment

Preceptors report that they feel ill-prepared and uncomfortable providing feedback and assessing learners. This is particularly so when a close working relationship has developed with the student or resident, and/or when learning problems have arisen that should be addressed. Nevertheless, assessment of student performance by faculty members as future practicing physicians and potential colleagues is an important professional responsibility. Identification of students who require improvement in any aspect of their clinical performance often initiates a positive and constructive process of assistance and remediation.



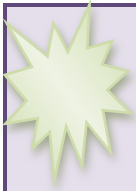
Avoid collusion. This is a special risk with advanced learners who share your practice for longer periods of time. Honest and thoughtful evaluation of the learner will engender more respect than avoidance of difficult but necessary feedback.

1. Observation and providing effective feedback

One of the most important things you can do as an effective teacher is to observe your student or resident with your patients. Observing what the learner does right and wrong and providing immediate feedback will help the learner to increase their confidence and improve more quickly.

Natural opportunities to observe students or residents occur most often in the hospital setting, such as observing the learner interacting with patients and staff while on rounds. In the office setting observation needs to be more deliberate but is no less important. Allot some additional time in the day to observe one learner activity, for example, taking the history of the presenting complaint or performing a procedural skill. Explain to both the patient and learner that you are there to observe that specific activity.

Keep observations short. Observing different parts of the clinical encounter (introduction, history, examination) at different times and with different patients is more time-efficient and provides more focused feedback than observing a learner perform one complete history and physical exam on one patient. Skills such as history taking, physical examination, procedures and patient counseling can all be observed.



Observation...

- Allow the learner to complete their task uninterrupted.
- Keep observations short and focused.
- Try and spread out your observations over different times and different patients.

Feedback and Assessment are ways to convey your observations back to the learner. The difference between feedback and assessment is outlined in the following table:

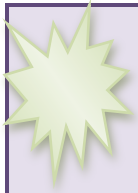
	Feedback	Assessment
Timing	Timely	Scheduled
Setting	Informal	Formal
Basis	Observation	Observation
Content	Objective	Objective
Scope	Specific Behavior	Overall Performance
Purpose	Improvement	Certifying Competence

[Adapted from: Mountain Area Health Evaluation Centre. Evaluation: Making it Work. http://www.mtn.ncahec.org/pdp/e-Learning_Tools.asp]

We are always providing feedback to learners about their clinical performance. We can choose to verbalize this feedback in an effective manner or let the learner collect unspoken feedback by observing our body language and tone of voice. Verbal feedback is needed by the learners in order to reinforce or improve their clinical performance. All learners can improve something!

Feedback is needed by everyone – not only by learners who are struggling. It is important to make “giving feedback” a habit balance the number of positive and constructive comments over time.

For independent learners it may be essential to schedule regular feedback or review sessions, avoiding the assumption that “all is well” until actually seeing evidence that the learner is doing well.



Feedback to the Learner Should Be...

- ...Timely – ideally immediate, but briefly postponed when the situation warrants (as in emergency or potentially embarrassing situations)
- ...Constructive – as part of a supportive learning environment where students are encouraged to learn from their mistakes
- ...Objective and accurate
- ...Specific and relevant to the task or situation. A useful way to provide feedback is to include:
 - What was done right
 - What needs improving
 - What to do next time

Effective feedback is timely, informal, based on observation, focused on a specific action and meant to improve performance. It is not a judgment statement. It is accepted by the learner if it is part of a supportive learning environment, from a credible source and felt to be valid. The purpose of feedback is to help learners to change their behaviors. Learners can be overwhelmed by a long list of things that need to be changed so try to prioritize and focus on only 2-3 key points at time. Providing helpful feedback can be broken down into three essential steps.

Step one - Listen to the learners' perspective

The learners start first! Learners need to be encouraged to reflect on what they did well, what needs improving and how they will make these improvements:

“Let’s talk about that well-baby exam. What specific aspects of the exam went well? Were there other parts that need improving?”

“How thorough was your history taking? Did you feel that you asked about all of the important characteristics of her pain? Was there anything you missed?”

Step two - Share your perspective

Next, share your perspective with the learners about what they did right and what needs improving. Most of the time the learners will have already identified

many of the same strengths and weaknesses that you want to discuss. Provide specific, objective observations and focus on a limited number of key issues only.

First, validate what was done well:

“I agree with you; I also thought you asked all the important questions to assess her nutritional status.”

“The patient seemed comfortable with your technique in obtaining a pap smear.”

Next, identify specific actions that could be improved:

“The child seemed quite irritable towards the end of the exam. Newborns can get cold.”

“Although you didn’t want to embarrass her, you cannot assess breath sounds adequately through her sweater.”

Step three - Always develop a plan for next time

Ask the learners to come up with strategies for improving their performance and provide guidance if they are unsure as to how to improve their performance:

“I know it is difficult to listen for murmurs in a restless baby. Next time, try listening for heart murmurs at the beginning of the appointment while the baby is lying quietly with the mother.”

“There are lots of risk factors for heart disease. Review your textbook tonight and we can discuss them tomorrow.”

2. Assessment

At some point you will be asked to reflect on your observations and feedback in order to make a judgment of the learner’s clinical performance and competency.

- Has the learner met your expectations?
- Has the learner met the expectations for their clinical experience with you?

It is helpful to review the assessment form with the learners at the beginning of their time with you so that you are both aware what criteria are being used to judge their performance. Specific examples and comments are very helpful to the learner and the University. If you have been engaging in regular observation and feedback you should not have any problems completing the forms and the information that you put down on the form will be no surprise to the learners.

Assessment of student performance by faculty members as future practicing physicians and potential colleagues is an important professional responsibility. A

constructive process of assistance and remediation is available to students who require improvement in any aspect of their learning. At Des Moines University, medical students in need of assistance are referred to the Associate Deans for Clinical Affairs and the Student Performance and Evaluation Committee.

References:

Langlois JP on behalf of the Mountain Area Health Education Centre. Giving Feedback. An educational monograph for community based teachers. <http://www.mahec.net/celt/acroread/Feedback.pdf> Accessed July 29, 2010.

Langlois JP on behalf of the Mountain Area Health Education Centre. Evaluation: Making it work. An educational monograph for community-based teachers. <http://www.mahec.net/celt/acroread/Evaluation.pdf> Accessed July 29, 2010.

F. What to do with challenging learners?

(Adapted from "Handling Problems." PEP2 Workbook, Society of Teachers of Family Medicine, 1999)

Learning problems exist whenever performance does not meet expectations. They can take a variety of forms and may be brought to your attention by a specific incident, a series of incidents or sometimes just a feeling that something isn't quite right. A simple and practical approach to learning problems can help to diagnose their cause and suggest some possible solutions.

Even if you are only seeing the learner on a limited number of occasions, you may still make important observations. Your observation could be part of a pattern of behavior. Even if you don't feel capable of dealing with the learning problem yourself, record your observations and bring them to the attention of the Associate Dean of Clinical Affairs. Learners who could benefit from additional assistance may fall between the cracks when supervised by a large number of clinical teachers.

Put the problem in context:

Is it real?

Is it important?

Perhaps this was just a misunderstanding, a rumor or a bad day. Nevertheless, some behaviors are potentially serious, such as learners who assume too much responsibility or fail to recognize their limitations. While you may wish to overlook smaller problems, remember that what you see could be part of a pattern and could indicate a significant problem.

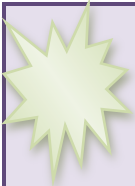
If the problem is both real and important, then you need to pursue the issue further:

1. *Is it a problem of knowledge or skill?*

Learners may not have the requisite knowledge or skills for a particular situation. The situation may be new or the knowledge or skills may have been forgotten. These problems are the easiest to address – the answer is education! Ultimately, the students are responsible for engaging in self-directed learning activities (textbook, journal readings) that will improve their knowledge base but you may be able to provide some suggestions. In addition, you may need to adjust your expectations, for example by reigning in some of

the responsibility the learners have been given until you are again comfortable with their knowledge and skills.

If a learner has the knowledge and skills to perform, but still fails to meet expectations, the teacher should consider other reasons for the problems.



The Learner with Problems

- Learning problems can arise secondarily to personal problems.
- Learners should have an identified family doctor who is NOT the primary preceptor. This person can deal with any personal and health problems so that these do not become an issue for the preceptor.

2. *Is there something that is influencing their behavior?*

Learners can perform poorly due to illness, stress or misunderstanding what was expected of them. Review your expectations with the learner and clarify any differences.

3. *Finally, is the problem primarily one of attitude?*

Does this learner exhibit behavior that is interfering with his or her education? You may find it difficult to deal with problems of behavior or attitude, especially if you have developed a close relationship with the learner. At Des Moines University, medical students in need of assistance are referred to the Associate Deans for Clinical Affairs and the Student Performance and Evaluation Committee.

References:

Garrett EA. Module 8: Handling Problems. From PEP2 Workbook, KJ Sheets, project director on behalf of the Society of Teachers of Family Medicine Preceptor Education Project Committee. 1999. Society of Teachers of Family Medicine.

G. Acknowledgements and more information

There are many sources of additional information for preceptors interested in furthering their knowledge and skills in clinical teaching.

DMU Faculty Development

The contents of this booklet are a modification by the Faculty Development Office in the College of Osteopathic Medicine at Des Moines University from a guide originally developed as an initiative of the **Office for Faculty Development and Educational Support, Faculty of Medicine, University of British Columbia** in 2003 and reprinted in 2005. Instrumental individuals from that organization responsible for developing this resource include:

Dr. Jean Jamieson, Faculty Associate (sections C, D, F, and G)

Dr. Leslie Sadownik, Program Director (Sections A, B, and E)

Dr. David Fairholm, Assistant Dean of Faculty Development (Section D)

The Office of Faculty Development at Des Moines University is grateful to the program at the University of British Columbia for their kind permission and thoughtful guidance in the production of this guide for use by our faculty. The original University of British Columbia guide and other useful information can be found at:

http://www.med.ubc.ca/faculty_staff/faculty_development/educational_material
Accessed July 29, 2010.

Feel free to contact our office or visit our website for information on our programs and links to other useful sites:


Faculty Development Office
Des Moines University
3200 Grand Avenue
Des Moines, IA 50312

www.dmu.edu/faculty/facultydevelopment

Clinical teaching survival guide

- The learner does not need to see every patient.
- The learner does not need to do the history, physical and counseling for each patient.
- The case can be presented in front of the patient.
- The physical exam can be performed together or components can be checked by the physician while the learner writes up the case.
- Have the learner see one patient while you see another.
- Teach *with* patients rather than *in between* patients.
- Take time off from teaching! Allow the learner to participate in other learning opportunities in your community that are suitable for their level of medical training.
- Try different teaching techniques such as the One-Minute Preceptor.
- Save in depth discussions for down time, such as between cases, when there is a cancellation or no-show, or during lunch.

COMPETENCY TEACHING CHECKLIST FOR CLINICIANS

Start Here	Competency
	<ol style="list-style-type: none">1. Obtain a well-organized history from the patient2. Perform a competent patient clinical examination3. Write well organized, clear, concise chart notes4. Generate a differential diagnosis5. Interpreting data (clinical, laboratory, radiological, etc.) correctly6. Identifying the most likely diagnosis7. Therapeutic reasoning
End Here	



DES MOINES UNIVERSITY

Faculty Development Office
Academic Center, Room 110
Des Moines University
3200 Grand Avenue
Des Moines, Iowa 50312