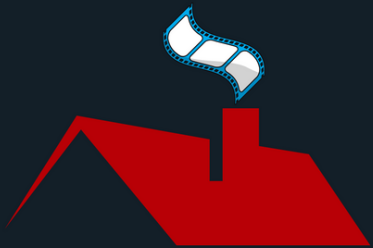




# CHANGE *of heart:* AN INTERPROFESSIONAL PRECEPTOR MINI-SERIES

## FACILITATOR GUIDE



HOME OF THE MINI - SERIES

INNOVATIVE PRECEPTOR & STUDENT TRAINING

**Directed by:** Craig D. Cox, PharmD, FCCP, BCPS and Renée J. Bogschutz, Ph.D., CCC-SLP

**Produced by:** Studio 84 Productions

**Target Audience:** Preceptors and Students

**Health Professions Represented:** Medicine, Nursing, Occupational Therapy, Pharmacy, Physical Therapy, and Speech-Language Pathology

**Released:** 2015

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**Facilitator Guide Copyright:** Facilitator Guide © 2017 Texas Tech University Health Sciences Center

**Interprofessional Education Competencies:** Roles and responsibilities, teams and teamwork, interprofessional communication, and values/ethics

**Preceptor Competencies:** Curriculum design, rotation preparation, communication, facilitating learning, learning environment, assessing learning, educational management, leadership, commitment to teaching, and continuing professional preceptor development.

# WELCOME

## FROM THE AUTHORS

Thank you for your purchase of one of our *Mini-Series* products. We are excited to provide you with this innovative product based on a new approach to both preceptor and student training for experiential rotations. Your purchase includes one or more professionally produced video episodes and a facilitator guide. The facilitator's guide contains a wealth of information including helpful tips for facilitating an interactive and engaging experience for your students and/or preceptors, as well as reflection questions to facilitate discussion among participants. In addition, each reflection question comes with a collection of expert advice to further enrich the learning experience. The expert advice was generated from a panel of health care professional preceptors and/or students who watched the *Mini-Series* videos and provided responses to each of the reflection questions.

We hope you find this product to meet your individual and/or institution needs and thank you again for your interest in enhancing the training of our preceptors and students. We value your input and look forward to the opportunity to hear from you in the future! For more information and to see the latest *Mini-Series* products visit us at [www.mini-series.org](http://www.mini-series.org).

Sincerely,



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## HOME OF THE MINI - SERIES

INNOVATIVE PRECEPTOR & STUDENT TRAINING

# FACILITATOR GUIDE

## OVERVIEW

This facilitator guide is a companion to the *Mini-Series*. It is intended to assist facilitators in guiding preceptors and/or students through a series of reflection activities that will impart important concepts concerning experiential rotations and interprofessional education. Included in this guide are learning objectives, targeted competencies, reflection questions, discussion guides, and teaching/learning pearls for each episode of the *Mini-Series*. The materials can be effective for both new and experienced preceptors and students. Reflection activities are appropriate for use in either small or large groups of preceptors and/or students. Groups could consist of one profession (i.e., Pharmacy) or an interprofessional combination of professions (i.e., Nursing, Medicine, Pharmacy, etc.).

## HISTORY OF MINI-SERIES CONCEPT

Conceptualized in 2009, the *Mini-Series* concept is the culmination of an extensive review of the different types of educational and training programs available. Innovations and evidence-based teaching and learning pedagogies were also incorporated into the concept development. To help break the cycle of education monotony and foster life-long learning, a design strategy for the *Mini-Series* was identified and put into action in 2012. Pursuing the desire for unique and engaging educational content, the *Mini-Series* concept takes the form of a professionally produced movie. In considering the busy schedules of today's preceptors and students, as well as the time associated with watching a full-length movie, each *Mini-Series* is divided into 6 to 12 video episodes with a central overarching plot and range from 5 to 14 minutes in length. Each episode is designed to include entertainment, preceptor-student scenarios in authentic environments, expert commentary, and teaching pearls.

## PRINCIPLES OF INSTRUCTIONAL DESIGN

The development of each *Mini-Series* is guided by three research based instructional design principles: (a) engaging and maintaining attention, (b) providing an authentic context, and (c) offering a diversity of content. Below, a brief description of each principle and an explanation concerning how it is applied to the *Mini-Series* concept has been provided.

### ENGAGING AND MAINTAINING ATTENTION

The principle of attention is applied to the *Mini-Series* by including professionally produced video episodes that consisted of the following characteristics designed to promote learner attention:

#### Brevity

Each video episode is relatively brief, ranging from 5 to 14 minutes in length, and well within the attention spans of the target population of adult learners.

#### Humor

Each video episode begins with a brief, 30 to 60-second, humorous scenario specifically designed to focus learner attention on the episode objectives.

#### Variability

Each video episode is designed to include entertainment, preceptor-student scenarios, expert commentary, and teaching/learning pearls.

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## PROVIDING AN AUTHENTIC CONTEXT

Learning environments that involve authentic tasks will be more likely to support transfer of learning to real-life situations. Recognizing the importance of this learning principle, the *Mini-Series* design considers the following elements:

### Scenarios

The core element of each video episode is an authentic scenario involving a situation frequently encountered on experiential rotations. Each scenario provides a rich, authentic context for learner reflection.

### Characters

Each episode maintains authenticity by including a full cast of characters with whom preceptors and students would typically interact within the context of an experiential rotation. Using video as a medium for instruction adds further contextual authenticity by depicting characters in ways and in places not possible through text or audio alone.

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## OFFERING A DIVERSITY OF CONTENT

This helps learners to learn at a general level to enable transfer of knowledge and skills to new situations, explore a diversity of perspectives, and see interrelationships between content domains. This principle is accomplished through:

### Scenario Diversity

Each *Mini-Series* includes 6 to 12 episodes covering a variety of realistic situations often encountered on experiential rotations. Continuity between episodes helps reduce cognitive load, as familiar characters work through challenges encountered on clinical rotations.

### Perspective Diversity

Each *Mini-Series* include diverse perspectives including those of patients, students, preceptors, healthcare professionals, and experts.

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## SUGGESTIONS FOR GUIDING ADULT LEARNERS

The information provided within this facilitator guide will prepare you to lead a session where learners will develop collaborative practice skills and enhance health care knowledge by assessing, explaining, discussing and applying information and experience. Your preparation and knowledge will help to create an environment that encourages critical thinking, evaluation, teaching, exploration and teamwork.

When approaching a learning session as a facilitator, it is helpful to have a basic understanding of how adults learn. Imagine that participants are asking you each of these questions as soon as they sit down in the room, and structure how you introduce the activity accordingly. Addressing these common questions will resonate with adult learners, and set your activity up for increased participation and success.

## Purpose

Why are we here?

- Adult learners prefer to understand the purpose of the activity before engaging. Introduce why this session is taking place, what are the objectives, and how will it connect to their role in health care.

## Relevance

How is this relevant to me?

- Each adult learner brings a unique set of experiences and knowledge to the lesson. Facilitating discussions that allow learners to relate and build on their personal experiences will make the topic more meaningful and relevant.

## Motivation

How will this help me?

- Intrinsic motivation is often the most powerful determinant in level of engagement from adult learners. Explicitly note how this activity relates to their role competence, interpersonal relationships, or other key motivators covered by the session objectives.

## Participation

What do I have to do?

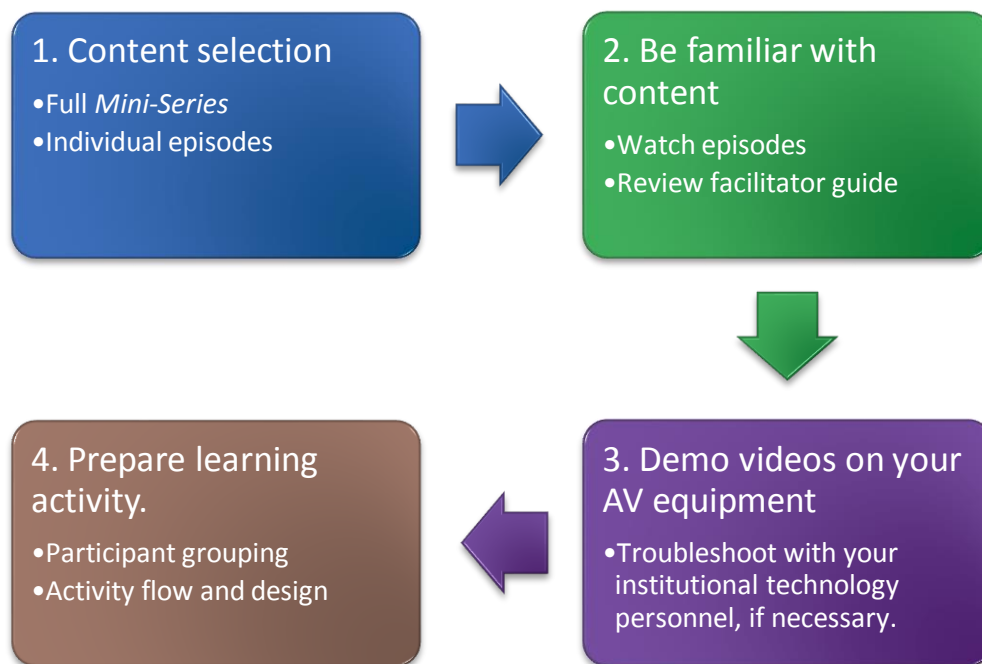
- The *Mini-Series* was created to allow active, rather than passive, engagement in the learning process. Explain to the learners that they will be participating in group discussions that challenge use of higher order thinking and emphasize exploration of one's own values and attitudes.

## FACILITATOR PREPARATION AND BEST PRACTICES

As the facilitator, you are key to the success of the learning activity. Your preparation and actions during the activity will impact how participants respond and how much they will take away.

### PRIOR TO THE LEARNING SESSION

Prior to the learning activity, prepare by selecting appropriate content, becoming familiar with the content, testing the videos on your equipment, and preparing for activity logistics.



## TIPS FOR LEADING A LEARNING ACTIVITY

The following tips for leading a learning activity are provided for your consideration.

- **Arrive on time and prepared.** Timeliness demonstrates you value the time of participants. Establish an environment of mutual respect and establish yourself as a competent facilitator.
- **Ensure that audio and visual equipment is setup and working as expected.** Know who to contact if needed. Have a plan for what you will do if learning activity time is lost due to technical issues
- **Share planned agenda and timeline for activity – be specific.** In professional relationships and hierarchies, knowledge is power. Share the knowledge, empower the participants. Adult learners feel more at ease and less resistive to participation when tasks and timing are clearly established.
- **Identify general and specific characteristics of participants and adjust your facilitation style, if needed.** Some common small group problems and suggestions are listed below.

Unfocused	Slow to Engage	Timid	Dominant
<ul style="list-style-type: none"><li>• Re-emphasize the goals from initial group discussion.</li><li>• Refocus those who stray from the topic or problem, using phrases such as “In this situation,” “According to our objectives,” “In the context of today’s discussion.”</li></ul>	<ul style="list-style-type: none"><li>• At first, be patient. Give the individual or group a chance to pick up the pace.</li><li>• If the pace does not naturally begin to quicken, ask focused questions.</li></ul>	<ul style="list-style-type: none"><li>• Don’t quickly press the issue, but look for an opportunity to direct a question to that person directly, allowing him/her a dedicated time to share thoughts.</li></ul>	<ul style="list-style-type: none"><li>• Work to involve others in the discussion, emphasizing the desire for all to contribute their point of view.</li><li>• If needed, talk to the dominant person during a break.</li></ul>

- **Remember, your goal as a facilitator is NOT to serve as content expert.** You are creating the environment in which participants can problem-solve and share information. Here are some open-ended questions you could use rather than resorting to “telling” the answer:
  - Does everyone agree with that statement?
  - Is there another view we haven’t considered?
  - How could we approach this from a different angle?
  - What information would be helpful to know at this point?
  - What would come next?
  - Could someone summarize where the group discussion is right now?
  - How would (someone of a different profession / status) react to your group’s response?

## THE EPISODE GUIDES

For each episode of the *Mini-Series*, detailed guides are provided. Guides are divided by audience (e.g., preceptor or student) and theme (e.g., IPE, sex and gender specific health). Episode guides are intended for facilitator use, rather than as worksheet handouts for participants. Each detailed episode guide includes:



### Episode Description

- A brief introduction to the content of the episode.

### Professions Represented

- List of professions featured in the episode.

### Competencies

- List of competency areas featured in the episode.

### Learning Objectives

- Each episode includes 1-3 learning objectives. The learning objectives use Bloom's Taxonomy of Learning Domains to note the level of higher thinking involved. The hierarchy is: know, understand, apply, analyze, evaluate, and create.

### Discussion Questions

- Questions target topics from the episode that relate directly to the current and planned experiences of that audience, related to their role in health professions.

### Discussion Guides

- Gathered from an expert panel of representative viewers, the discussion guide commentary can be used by the facilitator to supplement or redirect discussion, as needed.

### Learning Pearls

- The learning pearls highlight major learning points for each episode.

## EXAMPLE EVENT DESIGN

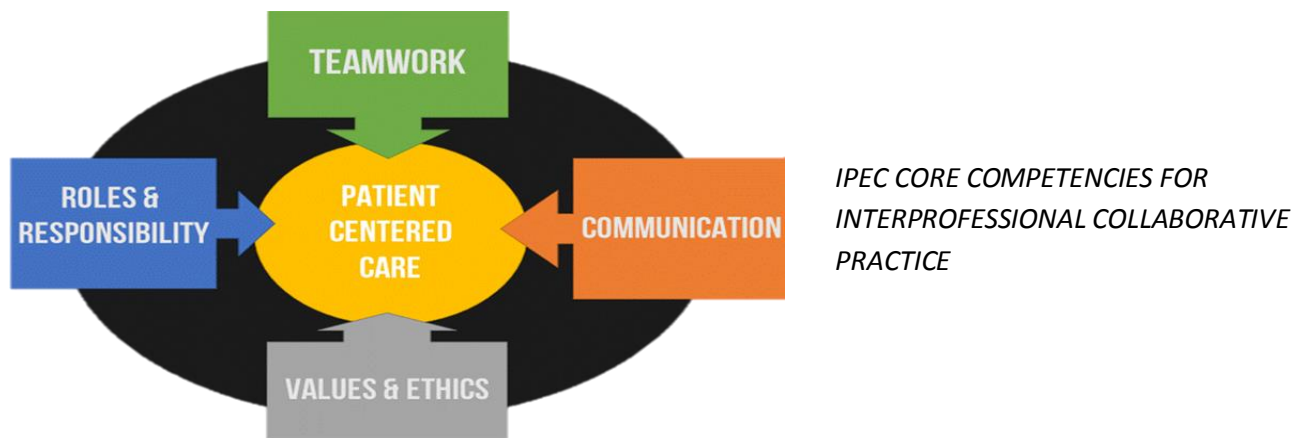
The following example could be used when designing a learning activity with the *Mini-Series*.

1. Participants are provided general instructions about the structure of the learning activity. These instructions would be presenter/site specific.
2. Participants watch video Episode 1 of the *Mini-Series*. *Time allotted: 7 – 12 minutes.*
3. Following the video episode, participants are asked either individually or as groups to consider one or more of the reflection questions provided in this facilitator guide related to intended audience (e.g., preceptor and/or student) or competencies (e.g., preceptor, IPE, etc.). A combination of questions are for integrated student/preceptor activities. *Time allotted: 5 minutes.*
4. Following individual/group reflection, the facilitator asks the audience to share their thoughts. *Time allotted: 5 minutes.*
5. The facilitator can augment the discussion with additional expert advice from the discussion section of guide to provide additional insight into the reflection questions. The expert advice serves to complement audience reflection. *Time allotted: 5 minutes.*
6. Steps # 1- 5 are repeated for all 12 episodes, or selected episodes based on time or content parameters.

## INTERPROFESSIONAL PRACTICE AND EDUCATION (IPE)

Interprofessional practice and education (IPE) is defined as “students from two or more professions learn **about, from and with** each other to enable effective collaboration and improve health outcomes. Interprofessional education is a necessary step in preparing a 'collaborative practice-ready' health workforce that is better prepared to respond to local health needs.” – World Health Organization, 2010

Promoting IPE is a key theme within training for health care professionals, preceptors, and students. Collaboration among health professions is a key mechanism to improve the quality and safety of patient care. Accordingly, increasing emphasis is being placed on IPE in both academic and clinical settings. A guide specific to interprofessional education has been included with this *Mini-Series*. The IPE themes and competencies are woven into each episode, and the corresponding guide provides a brief introduction to the main competencies. The four IPEC Core Competencies for Interprofessional Collaborative Practice, which are reinforced through educational and clinical experiences, are depicted and defined below.



### Teams and Teamwork

- Apply relationship-building values and the principles of team dynamics to perform effectively in different team roles to plan, deliver, and evaluate patient/population-centered care and population health programs and policies that are safe, timely, efficient, effective, and equitable.

### Interprofessional Communication

- Communicate with patients, families, communities, and professionals in health and other fields in a responsive and responsible manner that supports a team approach to the promotion and maintenance of health and the prevention and treatment of disease.

### Values and Ethics for Interprofessional Practice

- Work with individuals of other professions to maintain a climate of mutual respect and shared values.

### Roles and Responsibilities

- Use the knowledge of one's own role and those of other professions to appropriately assess and address the health care needs of patients and to promote and advance the health of populations.



## CHANGE OF HEART: AN INTERPROFESSIONAL MINI-SERIES

This is a 12 episode, knowledge-based, video *Mini-Series* developed to educate both preceptors and students regarding their participation in experiential rotations in an interprofessional clinical setting. Each individual video episode is 7-12 minutes in length and builds upon the next. The series follows multiple health professional preceptors including nurses, pharmacists, physicians, occupational therapists, physical therapists, and speech-language pathologists as they precept their students in both a hospital and extended care setting.

Through a combination of inappropriate and quality interprofessional interactions, participants will learn key principles regarding orientation, feedback, teamwork, and dealing with difficult preceptors or students. At moments throughout each episode, two preceptor and two student experts provide humorous interactions and share insights on how they would deal with each learning situation. Each individual episode ends with two important preceptor and two student learning pearls.

Episode	Professions	Competencies	Length
Episode 01: Medicine Orientation	Medicine	Teams and Teamwork Rotation Preparation	8 min
Episode 02: It's All a Blur	Nursing, Medicine, Pharmacy	Communication Facilitating Learning	9 min
Episode 03: Big Mistake!	Nursing, Medicine, Pharmacy	Communication Values and Ethics Learning Environment	7 min
Episode 04: Calm After the Storm	Nursing, Medicine, Pharmacy	Communication Team and Teamwork Leadership	8 min
Episode 05: Working Together	Medicine, Occupational Therapy, Pharmacy, Physical Therapy, Speech- Language Pathology, Social Work	Teams and Teamwork Roles and Responsibilities Educational Management	9 min
Episode 06: Close Call	Occupational Therapy, Speech-Language Pathology	Roles and Responsibilities Facilitating Learning	10 min
Episode 07: Words of Encouragement	Medicine, Physical Therapy	Communication Roles and Responsibilities Facilitating Learning	9 min
Episode 08: Pushing the Limits	Occupational Therapy	Roles and Responsibilities Assessing Learning	10 min
Episode 09: It's Not Easy	Nursing, Medicine, Occupational Therapy, Pharmacy, Physical Therapy, Speech- Language Pathology	Values and Ethics Commitment to Teaching Communication	12 min
Episode 10: Providing Feedback	Nursing, Physical Therapy	Communication Roles and Responsibilities Learning Environment	9 min
Episode 11: (Un)expected Death	Nursing, Medicine, Occupational Therapy, Pharmacy, Physical Therapy, Speech- Language Pathology	Communication Roles and Responsibilities	11 min
Episode 12: Running Reflection	Medicine, Occupational Therapy, Pharmacy, Physical Therapy, Speech- Language Pathology	Values and Ethics Roles and Responsibilities Continuing Professional Preceptor Development	8 min



## EPISODE 02: GUIDE for PRECEPTOR TRAINING

### EPISODE SUMMARY:

In this episode you will see a medicine preceptor and her student discussing a new patient with members of the interprofessional team.

### PROFESSIONS FEATURED:

- Medicine
- Nursing
- Pharmacy

### PRECEPTOR COMPETENCY:

- Facilitating Learning
- Rotation Preparation

### OBJECTIVES

- ✓ Recognize the importance of demonstrating respect to other health care professionals. (*Understand*)
- ✓ Discuss the necessity of proper supervision and communication with students. (*Understand*)

### DISCUSSION QUESTIONS

1. Discuss the potential consequences that may occur due to the student's lack of engagement with their preceptor in this scenario.
2. Describe the positive interactions between different health care professionals you viewed in this scenario.
3. List one thing you learned during the program that you intend on incorporating into your rotation experiences.

### DISCUSSION GUIDE

Positive interactions included seeking each other's input and respectfully listening to all ideas. The team put the patient's care at the center of discussion rather than egos, and reached an agreement through trust of expertise and collaboration.

"Direct" supervision indicates that the preceptor is clearly monitoring the student. Activities are verified for completion and accuracy, and the preceptor has the final say. Examples: new or high stake activities. With "indirect" supervision, review and oversight is still an expectation, but the student has more autonomy. Activities for indirect supervision may include activities in which the student has proven competency, such as interprofessional conferences or reviewing a chart.

*Reflect:* How confident are you at recognizing the importance of showing respect to other health care professionals?

### LEARNING PEARLS

- ◆ Be aware of your student's attention to what is going on when working in teams. If a student becomes disengaged, the learning is diminished and the potential for mistakes increases.
- ◆ Demonstrate how to work with other health care professionals on a team through effective role modeling.



## EPISODE 02: GUIDE for STUDENT TRAINING

### EPISODE SUMMARY:

In this episode you will see a medicine preceptor and her student discussing a new patient with members of the interprofessional team.

### PROFESSIONS FEATURED:

- Medicine
- Nursing
- Pharmacy

### OBJECTIVES

- ✓ Identify the importance of staying engaged with your preceptors when discussing patient care. (*Know*)
- ✓ Observe appropriate interactions between health care professionals. (*Know*)

### DISCUSSION QUESTIONS

1. Discuss the potential consequences that may occur due to the student's lack of engagement with their preceptor in this scenario.
2. Describe the positive interactions between different health care professionals you viewed in this scenario.
3. List one thing you learned during the program that you intend on incorporating into your rotation experiences.

### DISCUSSION GUIDE

The student's distracted and inappropriate behavior could result in harm to the patient. Her lack of engagement could ultimately have a negative impact on the student's progress towards licensure and impact her reputation among hospital staff, decreasing her involvement in learning opportunities.

The pharmacy preceptor modeled a positive interaction by being knowledgeable and clearly communicating with the team.

### LEARNING PEARLS

- ◆ It's easy to become distracted in a busy work setting, but it is critical to remain attentive to the activities of the health care team. You will learn more from your preceptor and other members of the team if you resist distractions.
- ◆ While it's vital to become more independent and take on more responsibility as you progress, know your limitations and run recommendations or interventions by your preceptor to make sure mistakes don't happen.



## EPISODE 02: GUIDE for IPE TRAINING

### EPISODE SUMMARY:

In this episode you will see a medicine preceptor and her student discussing a new patient with members of the interprofessional team.

### PROFESSIONS FEATURED:

- Medicine
- Nursing
- Pharmacy

### IPE COMPETENCY:

- Interprofessional Communication

### IPE COMPETENCY: INTERPROFESSIONAL COMMUNICATION

- Communicate with patients, families, communities and other professionals in a responsive and responsible manner that supports a team approach to the promotion and maintenance of health and prevention and treatment of disease.

### IPE OBJECTIVES

- ✓ Judge each team member's ability to listen actively and encourage the ideas and opinions of other team members. (*Evaluate*)
- ✓ Compile a list of effective communication tools and techniques to enhance team function and optimize patient safety. (*Synthesize*)

### IPE DISCUSSION QUESTIONS

1. Which team members engaged in active listening and encouraged ideas?
2. What communication tools and techniques could the team have used to enhance team function and optimize patient safety?

### IPE DISCUSSION GUIDE

The team members used effective techniques and demonstrated active listening through use of closed loop communication – repeating back what was heard to ensure understanding and successful transmission. This is a technique that can enhance team function and ensure patient safety through increasing accuracy in orders.

### IPE LEARNING PEARLS

- ◆ Demonstrate and train use of effective interprofessional communication tools and techniques to your student in order to facilitate team discussions and interactions that enhance team function and optimize patient safety.
- ◆ Listen carefully to what others on your team say, and then repeat the essence of the message back, to verify your understanding. This increases patient safety and assures that you are accurately interpreting the message.



## ACKNOWLEDGEMENTS

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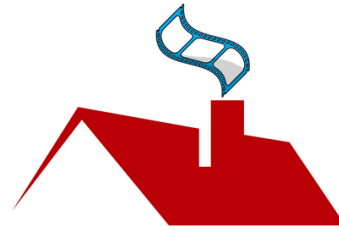
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INNOVATIVE PRECEPTOR & STUDENT TRAINING

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