

PRECEPTOR SERIES:

Great Expectations: Making Sure You and Your Learner are on the Same Page

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Case 1: A Questionable Drug Question

It is the third week of your learner Ben's rotation and the drug information question you assigned during week one is due. You sit down to grade the question and notice that the response is not professionally written, there is insufficient evidence to provide support to the response provided, and the document is missing in-text references. You start to wonder if Ben used any drug information resources to formulate the response! When you reach the end of the document, you find that Wikipedia and drugs.com have been listed as two of the references. Sitting in awe and wonder at the poor quality of this drug information question, you wonder what could have been done to prevent this?

Case 2: Lost Learner

It's 3:30 pm and after a busy day in the pharmacy, you're finally caught up on all of your pending patient issues and have time to do a clinical topic discussion with your learner, Kayla. You ask around, but none of the technicians or other pharmacists have seen Kayla since just after lunch time. Thinking that perhaps she went to the

conference room for some uninterrupted time to work on her patient case presentation, you head back there but find the conference room empty. In frustration, you text Kayla's cell phone and discover that she left the pharmacy a few hours ago and is running some errands before heading home to finish her case presentation from there. You are shocked that Kayla would have just taken off from the pharmacy without notifying anyone or handing off her patient care responsibilities. You wonder what gave Kayla the impression that this behavior was acceptable and how she could have acted so unprofessionally.

Benefits of Setting Expectations

The cases above illustrate some of the potential issues and frustrations that can arise when precepting learners. Fortunately, these difficult situations can be avoided by setting clear and appropriate expectations for the rotation. Learners often feel expectations are not clearly set for their experiences and preceptors have also identified this as an area for improvement.^{1,2} One study identified that students and preceptors felt rotation goals and expectations were well explained less than 50% of the time.¹

Developing a list of clear and concise expectations can be a great way to jump start a rotation. It helps the learner transition smoothly into your practice environment and provides them with an opportunity to clarify any preconceived notions about your rotation. Learners are moving frequently from rotation to rotation and preceptor to preceptor; therefore, expectations are changing for them constantly. Providing clear expectations initially can help to minimize learner anxiety or apprehension and aid in acclimating to your rotation.

Taking the time to outline your expectations at the start of a rotation can save time for you in the long run. Ensuring learners have a full understanding of your expectations decreases the chance for misinterpretation or confusion later. Also, when learners understand the preceptor's expectations of them, they can be empowered to work independently and become more productive members of the team.

Finally, setting clear expectations upfront can create a framework for effective feedback and evaluation later in the rotation. When learners know what is expected of them, it makes it easier to

provide feedback on whether or not they are meeting rotation expectations. This helps to prevent surprises on rotation evaluations and feedback sessions. For example, when learners know that they are expected to independently develop a comprehensive treatment plan for a patient by the midpoint of the rotation, the preceptor can more easily assess the learner's progress at that point in the rotation.

How to Set Expectations

When setting expectations for a learning experience, it is best to be as specific as possible. Telling a learner that you expect them to arrive early to rotation leaves room for interpretation. However, setting the expectation that they are at the pharmacy with their lab coat on and ready to jump into patient care tasks at 7:00 AM provides clear direction and minimizes misinterpretation. Including

your expectations on a written rotation overview or syllabus is a great way to ensure clarity. This document can be reviewed with learners at the start of your rotation, can help you stay organized throughout the rotation, and ensure that all major orientation points are covered. In addition, this provides the learner with a hard copy of your expectations to refer to, as needed, throughout the rotation. If your syllabus clearly states that learners are expected to turn in a project draft at the end of week three of the rotation, a learner cannot later claim that they were unaware of the deadline.

What Expectations to Set and When

Expectations cannot just be set on the first day of rotation and forgotten.

You may need to review expectations throughout the rotation and set specific expectations for different rotation activities. Table 1 provides various time points throughout a rotation experience and things to consider when drafting expectations.

Unmet Expectations

Unclear expectations cause frustration both for the learner and the preceptor.³ Unsatisfactory projects and assignments require that preceptors invest additional time providing feedback and reviewing the revised work. Perhaps more importantly, unclear expectations could result in suboptimal patient care or even pose safety concerns to patients. Preceptors may perceive that their learners exhibit unprofessional behavior, which can result in poor evaluation scores and potentially impact a learner's ability to progress

TABLE 1. Questions to Consider When Setting Expectations for Learners

<i>Rotation Time Point</i>	<i>Questions for Consideration</i>
Initial email from learner	<ul style="list-style-type: none"> • What first day logistics does the learner need to be successful? • Directions to the site and where to park? • When to arrive? • What to wear? • What to bring (e.g. lab coat, name tag, calculator, drug references, lunch)? • What not to bring (e.g. computer, cell phone)? • What pre-rotation paperwork is required by site? • What reading or preparation should be completed before the start of the rotation? • Do they have a copy of the rotation syllabus or overview? • Do you have a learner-specific rotation calendar to provide at this time?
First day of rotation	<ul style="list-style-type: none"> • What is the learner's background? • What are the learner's goals and expectations for the rotation? • What do you hope the learner takes away from the rotation? • What site-specific policies exist? • How should learners contact you? How frequently? • What is the daily rotation schedule? • What rotation activities/projects are expected? • What interactions will they have with other health care professionals? What are your expectations for these interactions? Should they review recommendations or discussion points with you first? • What electronic devices are allowed? • What resources will they have access to?
When assigning daily patient care responsibilities	<ul style="list-style-type: none"> • How many patients is learner responsible for? • How many interventions must they complete? • What interventions must be documented (and where)? • How, when, and whom to report their daily work to?
When assigning longitudinal activities (e.g. topic discussions or required rotation activities)	<ul style="list-style-type: none"> • What reading or preparation should be completed in advance? • What is learner's role in the discussion? An active participant or passive listener? • If desired, when should draft documents be submitted? • What is the penalty for being unprepared? • What is the timeline for receiving feedback?
Midpoint Evaluation	<ul style="list-style-type: none"> • What progress has been made on the rotation goals? Do the initial goals need modification? Can new goals be set for the remainder of the rotation? • Can learner handle more complex patients or manage a larger number of patients in their daily work? • Is learner struggling? Should expectations be scaled back? • What progress has been made on assigned projects? • What deadlines are approaching for draft or final submissions? • Are these timelines still reasonable?

through their program.

It is important that preceptors address unclear or unmet expectations immediately so that the learner has an opportunity to correct their behavior. Identifying problems early in a rotation allows time to address specific clinical deficits, clarify or reset expectations, and establish a plan for the rest of the rotation. The first step is always to address the failed expectation directly with the learner.⁴ This conversation should occur privately between the learner, the preceptor who set the expectation, and the preceptor who observes the failed expectations. Learners must know that their work or performance is subpar and be given an opportunity to improve. During this conversation, the preceptor must reiterate the expectation and provide the learner with a plan for following up on their future work or performance.

Recognizing a failed expectation is also an important opportunity for preceptors to reflect on their own practices. Was the expectation set clearly? Did the learner understand the expectation? What

potential communication gaps exist? Is there an opportunity to make this expectation clearer for future learners? This exercise in self-reflection can help future rotation experiences run more smoothly.

Continued failure to meet expectations may warrant additional discussion with the learner's school of pharmacy or residency program director.⁴ Complete documentation of the learner's experience with you, including concerns about professionalism, examples of daily work or projects, documented performance evaluations, summaries of pertinent conversations, and actions that you took as a preceptor are valuable pieces of information to maintain.

Conclusion

Clear and specific expectations for your learners can help a rotation run smoothly, create a framework for effective feedback, and save you time as a preceptor. Setting expectations at the start of a rotation and evaluating them throughout the learning experience helps prevent miscommunication and provides valuable

structure for learners. It will take practice, and probably a few frustrating moments, but you can transform your rotation into one with great expectations. ●

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