NATIONAL PHARMACY PRECEPTORS CONFERENCE

Purposeful Preceptor Development Moving From Surviving to Thriving

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Disclosure

In accordance with the ACPE's and ACCME's Standards for Commercial Support, anyone in a position to control the content of an educational activity is required to disclose their relevant financial relationships. In accordance with these Standards, ASHP is required to resolve potential conflicts of interest and disclose relevant financial relationships of presenters.

- In this session:

   All planners, presenters, reviewers, and ASHP staff report no financial relationships relevant to this activity.

Objectives

1. Describe how CPD improves personal satisfaction and professional growth (move from surviving to thriving!)
2. Develop individual precepting goals based on self-assessment.
3. Construct an implementation plan for Continuing Professional Development.

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CPD Success Story

- The story of Ed

My Personal Story

Paradigm Shift: Major Principles

#1: Keeping the right balance (P/PC balance)

- *Aesop's Fable of the goose and the golden egg*
  - P = Production (desired results: the golden eggs)
  - PC = Production Capability (ability/asset that produces the golden eggs: the goose)

Covey S. *7 Habits of Highly Effective People.* New York, NY: Simon & Schuster, Inc.; 1989.

AACP Core Entrustable Professional Activities for New Pharmacy Graduates[a,b]
Appendix 1

Core Entrustable Professional Activities (EPA) Domains

1. Patient Care Provider
2. Collaborative Team Member
3. Population Health Promoter
4. Information Master
5. Practice Manager
6. **Developer**

American Association of Colleges of Pharmacy. Entrustable Professional Activities (EPAs) - Appendix 1.
https://www.aacp.org/sites/default/files/2017-10/Appendix1CoreEntrustableProfessionalActivities%20%281%29.pdf.
Accessed August 27, 2018.

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Paradigm Shift: Major Principles

#2: Begin with the end in mind[1]

- *Value-based motivations*

Know your life purpose in 5 min[2]:

- *What you do*
- *Who you do it for*
- *What they need*
- *How they are changed*

"If the ladder is not leaning against the right wall, every step we take just gets us to the wrong place faster." ~Stephen R. Covey

1. Covey S. *7 Habits of Highly Effective People*. New York, NY: Simon & Schuster, Inc.; 1989.
2. How to know your life purpose in 5 minutes. Adam Leipzig, TEDxMalibu

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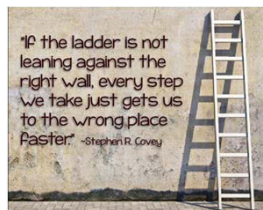
<u>WHY</u> We Teach
Focus on Intrinsic Motivators & Meaning of Teaching

☑ **IDENTITY**
'Teaching is who I am.'

☑ **GIVING BACK**
'I was lucky enough to benefit from excellent teachers...it's a way of repaying them'

☑ **DEVELOP NEXT GENERATION**
'It's a question of passing things on, a bit of a legacy...'

☑ **TEACHING AS LEARNING**
'If you have students and residents with you, you'll never be obsolete...'

☑ **TEACHING AS ENERGIZING AND GRATIFYING**
'Teaching renews my interest and my focus.'

Steinert Y and MacDonald E. Why physicians teach...give back by paying it forward. Medical Education. 2015; 49: 773-782.
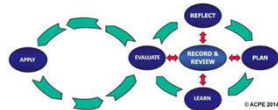
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HOW do I continue to push myself to grow?
The Need for a General Framework

- **Continuing Professional Development (CPD)** Approach to learning that supports:
  - ✓ Continuous learning
  - ✓ Practice-based growth
  - ✓ Self-directed development

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WHAT areas should I focus on for my development?
Understand we have different learning needs

- Same goal = self development
- Different personal and professional needs

Preceptors have different needs

2016 UW School of Pharmacy Preceptor Self-Assessment Survey Results:

- # of preceptors that **listed their strengths** as a preceptor: 283 (75.5%)
- # of preceptors that provided **reflections regarding improving** as a preceptor: 263 (70.1%)

Improvement Area (n=375)	%
Time Management	22
Personal Development and Training	20
Rotation Experience	20
Teaching	15
Feedback	11
Communication	6
Role Model	3
Other	3

Chung J, Kha E and O'Sullivan T. Preceptor Self-Assessment: Jump Start Continuing Professional Development (CPD). 2017 AACP Education and Research poster.

POLLING SLIDE

How many Preceptor Development CEs have you attended in last 2 year?

A 0-2
B 3-5
C 6-8
D Too many to count

Why are you here?

POLLING SLIDE

Do you know about the CPD approach?

A Yes
B No

Continuing Pharmacy Education ≠ CPD

Continuing Pharmacy Education (CPE)

- A <u>structured educational activity</u> designed or intended to support the continuing development of pharmacists to maintain and enhance their competence.

Continuing Professional Development (CPD)

- A <u>self-directed</u>, <u>ongoing</u>, <u>systematic</u> and <u>outcomes-focused</u> approach to lifelong learning that is applied into practice. It involves the process of active participation in formal and informal learning activities that …support achievement of career goals.

Accreditation Council for Pharmacy Education. Continuing Professional Development.
https://www.acpe-accredit.org/continuing-professional-development/. Accessed June 15, 2018.

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Traditional CE Model

PROS

- Structured
- Easy to measure
- Defined endpoint
- Convenient
- Traditional teaching methodology
- Current model

CONS

- Accumulation of credits (Quantity vs. quality)
- No requirement to link to practice
- Difficult to customize to individual needs
- Outcomes of learning poorly defined and assessed

Accreditation Council for Pharmacy Education. Continuing Professional Development.
https://www.acpe-accredit.org/continuing-professional-development/. Accessed June 15, 2018.

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The Elements of CPD

I consider my current and future practice, and self-assess my professional development needs and goals.

REFLECT

I consider the outcomes and effectiveness of each learning activity and my overall plan, and what (if anything) I want or need to do next.
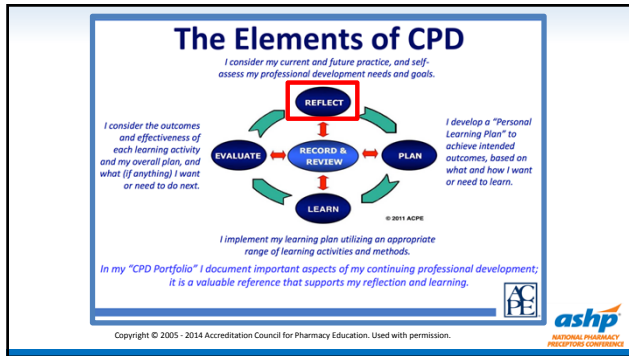
EVALUATE — RECORD & REVIEW — PLAN

I develop a "Personal Learning Plan" to achieve intended outcomes, based on what and how I want or need to learn.

LEARN

© 2011 ACPE

I implement my learning plan utilizing an appropriate range of learning activities and methods.

In my "CPD Portfolio" I document important aspects of my continuing professional development; it is a valuable reference that supports my reflection and learning.

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REFLECT

- First step to self-directed learning
- Making the unconscious conscious
- Components:
  - ✓ Linking past, present and future
  - ✓ Consider experience from multiple perspectives
  - ✓ Stating the lessons learned
  - ✓ Identify personal strengths and opportunities for improvement

ACPE CPD Program - CPD Resources: Components of the CPD cycle
https://www.acpe-accredit.org/pdf/CPDConceptsACPEWebsiteFeb2015.pdf. Accessed June 15, 2018.
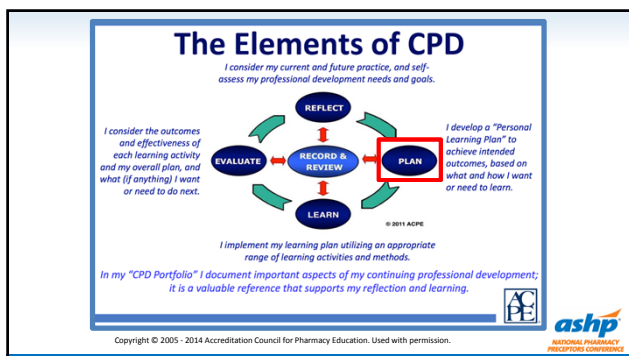
PLAN

Based on the identified opportunities of improvement, what broad goals do you have?

- **Develop an action plan**
  - ✓ Identify resources and challenges
  - ✓ Identify learning activities
  - ✓ Establish timeline

- **Develop SMART learning objectives**
  - ✓ Specific
  - ✓ Measurable
  - ✓ Achievable
  - ✓ Relevant
  - ✓ Timed

ACPE CPD Program - CPD Resources: Components of the CPD cycle
https://www.acpe-accredit.org/pdf/CPDConceptsACPEWebsiteFeb2015.pdf. Accessed June 15, 2018.

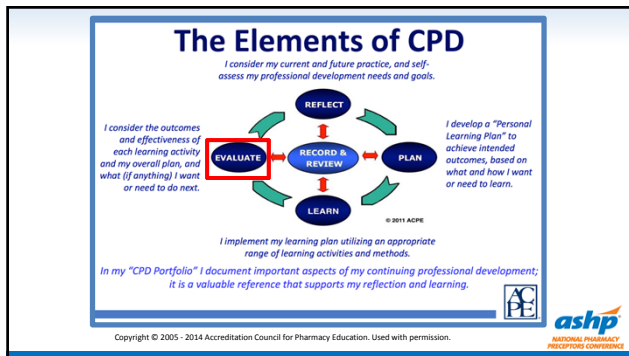

The Elements of CPD

LEARN (IMPLEMENT)

- **Use different learning activities and methods**
  - ✓ Formal/structured/accredited activities
  - ✓ Informal/unstructured activities
  - ✓ Work-based learning

- **Activities chosen should be <u>outcomes-driven</u> to meet stated learning objectives**

ACPE CPD Program - CPD Resources: Components of the CPD cycle
https://www.acpe-accredit.org/pdf/CPDConceptsACPEWebsiteFeb2015.pdf. Accessed June 15, 2018.

The Elements of CPD

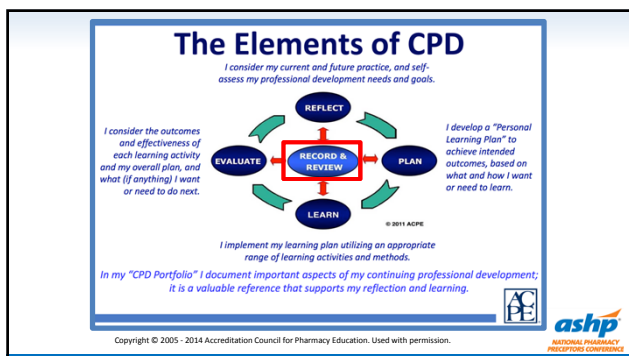_____

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EVALUATE

- **Review personal learning plan at least annually**
  - ✓ Evaluate your progress toward achieving objectives
  - ✓ Evaluate educational activities to ensure adequate content and learning (alignment with your goal)
  - ✓ Ensure you are following action plan & timeline
  - ✓ Consider adjustments in your objectives and plan

ACPE CPD Program - CPD Resources: Components of the CPD cycle
https://www.acpe-accredit.org/pdf/CPDConceptsACPEWebsiteFeb2015.pdf. Accessed June 15, 2018.

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The Elements of CPD

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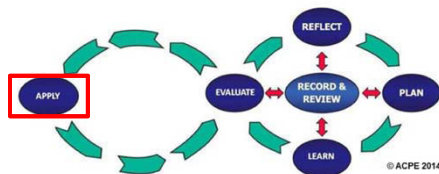
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RECORD and REVIEW (PORTFOLIO)

- Documentation is integral to each component of the learning cycle
- Serves as a record for all your CPD activities
- Is a tool to facilitate achievement of your learning objectives and personal learning plan

- Needs to be:
  - ✓ User-friendly (accessible and simple)
  - ✓ Dynamic & comprehensive (1 stop shop)
  - ✓ Facilitates achievement of learning plan
  - ✓ Standardized format: Electronic or paper-based (for you to use)

ACPE CPD Program - CPD Resources: Components of the CPD cycle
https://www.acpe-accredit.org/pdf/CPDConceptsACPEWebsiteFeb2015.pdf, Accessed June 15, 2018.

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CPD Cycle: Closing the Loop

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APPLY

- Link what was learned into practice
- Did the learning impact practice?

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Key Takeaways

- Personal Development helps move us towards meaningful end goals *(move from surviving to thriving!)*
- CPD is a <u>systematic</u> framework that supports <u>ongoing</u> and <u>self-directed</u> learning to meet individual needs

POLLING SLIDE

CPD is an approach to lifelong learning and includes the following:

A Reflect, Conceptualize, Apply, Act
B Reflect, Plan, Learn, Evaluate
C Plan, Do, Study, Act
**D** Instruct, Model, Coach, Facilitate

Setting the stage

- New Pharmacy System Director
- Residency program expansion
- Staff competency serving as primary method of staff development
- Practice changes emerging
- PPMI Task Force

Scattered approach

- Endless surveys
- Pushing out assignments to preceptors
- Unclear reporting structure
- Residency accreditation standards
- "Check the box" mentality
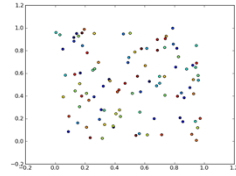
CPD in ACTION

- 11 Page Packet
- Background
- Learning Styles
- Suggestions
- Examples

PLAN: Personal Learning Plan

Goal: SMART Learning Objective	Planned Activities and Resources To Be Used	Dates
		Goal start date
		Goal finish date
		Actual finish date
		Goal start date
		Goal finish date
		Actual finish date
		Goal start date
		Goal finish date
		Actual finish date
		Goal start date
		Goal finish date
		Actual finish date
		Goal start date
		Goal finish date
		Actual finish date

S=Specific   M=Measurable   A=Achievable   R=Relevant   T=Timed

Putting it all together = CPD

- CPD was specific to each person
  - Ownership instead of assigned
- CPD has clear defined expectations
  - Three goals with one focused on preceptor development
- CPD pulled in all the ongoing initiatives

POLLING SLIDE

Do you have a formal or informal CPD program?

A Yes formal
B Yes informal
C In progress or tried with little success
D New concept

Your CPD Toolkit

Training Tools

Resources

Documentation

Your Personal CPD Plan

1. REFLECT: Complete your self-assessment

UNIVERSITY OF WASHINGTON PRECEPTOR SELF-ASSESSMENT FORM

- Please take the opportunity to indicate how consistently you demonstrate these valued behaviors to your student pharmacists on a scale of 5 = Always to 1 = Never.
- You will use the results to help identify your strengths and opportunities for improvement.

Role-Model Behaviors

Acts in a positive manner during interpersonal interactions with others	5	4	3	2	1
Demonstrates expertise in practice area	5	4	3	2	1
Displays compassion for patients	5	4	3	2	1
Contributes to decisions of the health care team	5	4	3	2	1
Advocates for patients and the profession	5	4	3	2	1

Teaching/Coaching Behaviors

Displays a genuine interest in student learning	5	4	3	2	1
Consistently available for student questions and guidance	5	4	3	2	1
Stimulates dialogue that encouraged discussion, critical thinking and aided in problem resolution	5	4	3	2	1
Arranges time and resources to aid student learning	5	4	3	2	1
Provides useful feedback and clear expectations	5	4	3	2	1
Seeks and is receptive to student input into learning Experience	5	4	3	2	1

Facilitating Behaviors

Tailors learning opportunities to meet student needs and interests	5	4	3	2	1
Effectively organizes appropriate learning activities and revises where needed	5	4	3	2	1
Allows and encourages students to build independent practice skills	5	4	3	2	1
Creates and maintains a welcoming environment	5	4	3	2	1

Your Personal CPD Plan

1. REFELCT: Complete your self-assessment
2. PLAN: Create your personal learning plan

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SMART* Learning Goal	Planned Activities and Resources To Be Used	DATES
		Goal Start Date:
		Goal Finish Date:
		Actual Finish Date:

•SMART
Specific – Does the objective tell you precisely what you are going to do differently as a result of the activity?
Measurable – Can you measure a change?
Achievable – Is the objective challenging, and yet not totally unachievable?
Relevant – Does the objective relate to the specific role/job you are currently undertaking?
Timed – Can specific dates for completion and reflection be attached to the objective?

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Examples of CPD Goals

SMART* Learning Goals	Planned Activities and Resources To Be Used	DATES
(PRECEPTOR) Demonstrate improvement in coaching skills by providing weekly feedback using effective feedback strategies with next APPE student (scheduled for Feb 2019)	Learn and practice 3 effective feedback strategies	Goal Start Date:
		Goal Finish Date:
(PROFESSIONAL/PERSONAL) Describe 3 best practices for safety and quality improvement and develop a plan to integrate these best practices into PharmD curriculum by spring of 2019 to help students be more practice ready	Complete the Patient Safety and Quality Certificate program and participate in a practice-based project	Actual Finish Date:

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Your Personal CPD Plan

1. REFELCT: Complete your self-assessment
2. PLAN: Design your personal learning plan
3. IMPLEMENT: ???

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Making CPD a Reality

- Discuss ways to integrate CPD framework and utilize the CPD Toolkit into preceptor development

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Achieve End Goals With the Right Support

Goal

- Individual benefits for each preceptor

Supporting Tools

- ✓ **Toolkit: CPD Training Tools**
- ○ Self assessment to identify personal needs and interests
- ○ Repository of preceptor development goal ideas

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Staff Training and Support

Staff Training Needed

- General CPD approach

- Setting SMART goals

Supporting Tools

- ✓ **Toolkit: CPD Resources**

- ✓ **Toolkit: CPD Training Tools**

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Preceptor Development

Accreditation requirements
- **PharmD programs: ACPE Standards 2016**

  20.3. Preceptor education and development – Preceptors are oriented to the program's mission, the specific learning expectations for the experience outlined in the syllabus, and effective performance evaluation techniques before accepting students. The college or school fosters the professional development of its preceptors commensurate with their educational responsibilities to the program.

- **Residencies: ASHP Accreditation Services**
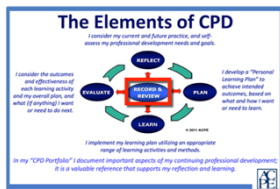 Standard 4: Requirements of the RPD and Preceptors
  4.4.e RPD has the responsibility for creating and implementing a preceptor development plan for the residency program
  4.8 Preceptors must demonstrate the ability to precept residents' learning experiences by meeting one or more qualifying characteristics in all of the following six areas

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Systems Support and Accountability = KEY

- Integrate preceptor development into your current advancement or recognition program
  - Clinical ladders
  - Credentialing or privileging
  - Part of job performance evaluation
- Create a new program such as CPD that will complement your current practice model and encourage preceptors to take an active role in their own development
- See **Toolkit: Documentation**

The Elements of CPD

I consider my current and future practice, and self-assess my professional development needs and goals.

I consider the outcomes and effectiveness of each learning activity and my overall plan, and what (if anything) I want or need to do next.

I develop a "Personal Learning Plan" to achieve intended outcomes, based on what and how I want or need to learn.

REFLECT
EVALUATE — RECORD & REVIEW — PLAN
LEARN

I implement my learning plan utilizing an appropriate range of learning activities and methods.

In my "CPD Portfolio" I document important aspects of my continuing professional development; it is a valuable reference that supports my reflection and learning.

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Systems Support

- Use systems you already have
  - Preceptor portal
  - PharmAcademic
  - Institutional Performance Evaluation

Preceptor Portal (SAMPLE)

REFLECT

1. Academic Year
2. Review Preceptor and and site evaluations with student comments *(see links to evaluations)*
3. Satisfied with student evaluation
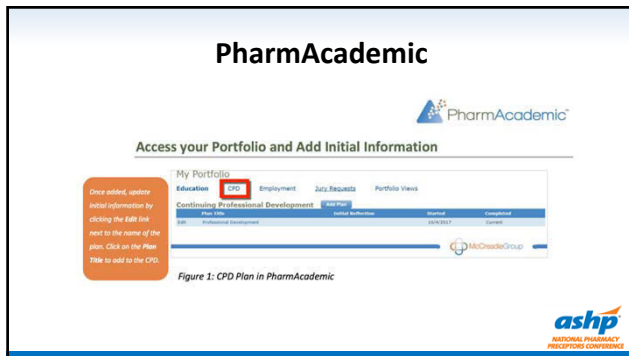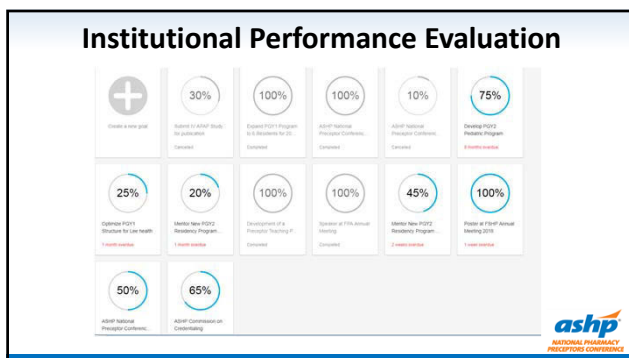4. Self-Reflection on preceptor behaviors

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Preceptor Portal (SAMPLE)

CPD PLAN includes:

- Goal and Objectives
- Resources/activities
- Success Measures
- Goal start date & finish date

PharmAcademic

Figure 1: CPD Plan in PharmAcademic

Institutional Performance Evaluation

Goal Tracking and Reflection

Additional Benefits of CPD

CPD approach/platform can contribute to:
- Improved employee competence, confidence
- Recruitment, engagement, and retention
- Alignment of employee educational needs with organizational needs/goals
- Creation of learning culture vs. training culture
- Meeting accreditation expectations (e.g. TJC)
- Benchmarking for performance appraisals
- Credentialing/privileging review and verification
- Recognition

Your Personal CPD Plan

1. REFELCT: Complete your self-assessment
2. PLAN: Design your personal learning plan
3. IMPLEMENT: Construct your implementation plan

POLLING SLIDE

Where is the biggest opportunity for the CPD approach?

A Preceptor Development
B Professional Development
C Self Development
D All of the above

CPD Success Story

- The story of Ed

Key Points

- Reflection is essential to CPD and gets easier over time
- People need a lot of support, especially early on
- Go through the process yourself at least once to help you coach others
- Use peers as a learning support group
- It is a continuous learning process

Additional CPD Resources

- ACPE: Continuing Professional Development
- CPD Scholarship in Pharmacy
- The Benefit of CPD for Continuing Pharmacy Education

I. **Preceptor Behaviors:** On a scale of *5 = Always to 1 = Never*, please indicate how consistently you demonstrate the following behaviors to your student pharmacists:

Role-Model Behaviors

Acts in a positive manner during interpersonal interactions with others	5	4	3	2	1
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Creates and maintains a welcoming environment	5	4	3	2	1

NOTE: Preceptor Self-Assessment Tool developed by University of Washington School of Pharmacy based on student-valued teaching behaviors. O'Sullivan et al. *Student-Valued Measurable Teaching Behaviors of Award-Winning Pharmacy Preceptors*. Am J Pharm Educ 2015; 79(10).

1

UNIVERSITY OF WASHINGTON PRECEPTOR SELF-ASSESSMENT AND CPD PLAN

II. List 2 strengths you have as a preceptor

1. _____

2. _____

III. Reflection regarding improving as a preceptor:

IV. Preceptor CPD Plan and Implementation

Based on your self-assessment and the identified opportunities of improvement, describe one precepting goal for this coming year.

From your precepting goal, develop a CPD plan that includes the following

SMART* Learning Goal	Planned Activities and Resources To Be Used	DATES
		Goal Start Date:
		Goal Finish Date:
		Actual Finish Date:

*SMART
Specific – Does the objective tell you precisely what you are going to do differently as a result of the activity?
Measurable – Can you measure a change?
Achievable – Is the objective challenging, and yet not totally unachievable?
Relevant – Does the objective relate to the specific role/job you are currently undertaking?
Timed – Can specific dates for completion and reflection be attached to the objective?

V. Preceptor CPD Evaluation

Preceptor should evaluate the effectiveness and impact of their CPD.

A sample evaluation tool is provided for your reference.

LEVELS	QUESTIONS	RESPONSES
Satisfaction	Were your learning objectives met?	Fully, partially or not at all
Learning	What did you learn from this experience?	OPEN response
Outcome	How will your students be affected by your learning?	OPEN response

2

Creating a Continuing Professional Development Plan (CPD) in PharmAcademic

You can create a learning plan in PharmAcademic using the Continuing Professional Development model. PharmAcademic allows you to create goals and add activities, evidence and reflections to demonstrate progress toward each goal.

Contents

Access your Portfolio and Add Initial Information

Figure 1: CPD Plan in PharmAcademic

> *Once added, update initial information by clicking the **Edit** link next to the name of the plan. Click on the **Plan Title** to add to the CPD.*

1. Log in to PharmAcademic, select **My Portfolio**, and click the **CPD** link.

2. Click the **Add Plan** button.

3. In the **Linked To** drop-down box, select the program to which you would like to associate the CPD plan.

4. Enter a **Title**, **Description**, and **Start Date**. *Note: Consider how often you should/will review the CPD plan and include date/time of year in the Title, i.e. 2018 Q1 CPD Plan. The description can be used to describe the overall theme of the CPD plan, i.e. CPD Plan focusing on preparation for Board Certification examination.*

5. Click the **Completed** box once you have finished adding the plan. While drafting the plan, leave this box unchecked.

6. Select **Allow in Portfolio Views** once your plan is complete if you would like those with access to your portfolio to be able to view your CPD plan.

Figure 2: Adding a CPD Plan

Add your Initial Reflection

Begin by writing an initial reflection to assess your individual learning needs, current practices, and any successes and challenges that you have faced.

1. Click on the title of the plan.

2. Click the **Add Initial Reflection** button.

3. Add the **Title** of your reflection, i.e. "Initial Reflection" or "2018 Q1 Reflection."

4. Select **Allow in Portfolio Views** if you would like those with access to your portfolio to be able to view your initial reflection.

5. Click the **Save** button.

Figure 3: Adding an Initial Reflection

Enter your Goals

To add your goals:

1. Click the **Add Goal** button to add the first goal. Use this button to add each goal.

2. Enter a **Title**, **Description**, **Start Date** and **Target Completion Date**.

3. Once the goal is achieved, click **Edit** next to the goal to select **Goal Achieved**.

4. Select **All in Portfolio Views** if you would like this goal viewable in your portfolio.

5. Click the **Submit** button.

Figure 3: Adding a Goal

To update your goals:

- Click the **Delete** link to remove the goal.

- Click **Edit** to update the goal, including marking the **Goal Achieved.**

Figure 4: Managing Goals

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April 2018

Add Activities to Reach the Goal

Once your goals are added, you can add activities to reach those goals.

Click the box to select a goal and then click **Add Activity** link.

Figure 5: Adding Activities

To add an activity:

1. Click on the box next to the goal.

2. Click on the **Add Activity** link.

3. Enter a Title, **Description**, **Start Date**, **Target Completion Date**.

4. Select **Activity Completed**, when appropriate.

5. Select **Allow in Porfolio Views** if desired.

6. Click on the **Submit** button.

Figure 6: Adding Activities

To update activities:

- Click the **Delete** link to remove the goal.

- Click **Edit** to update the activity, including marking the **Activity Completed**

Adding Evidence and Reflections

As you build your CPD plan, you can add pieces of evidence and reflections. Click on the box to select the goal or activity, and then select "Add Evidence" or "Add Reflections."

Add Evidence

Select the **Evidence Type** in the drop down box and then enter information about your experience. You can add a supporting file, if you choose. Click the **Save Evidence** button when you are finished.

Note: Once you have added a piece of evidence, you can add a reflection to it.

Add Reflection

Enter a **Reflection Date**, **Title**, and the reflection in the **Description** box. Click the **Save** button.

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April 2018

PharmAcademic™

Manage CPD Plan: Professional Development

Return to Portfolio

Goals

Add Goal

		Begin Date	Target Date	Achieved Date			
☐	Diabetic Patient Skills	10/4/2017	12/1/2018		Add Activity	Edit	Delete

Add Evidence to Selected Goals   **Add Reflection to Selected Goals**

Activities

		Begin Date	Projected Completion	Complete Date		
☐	Participated at Diabetic Screening Clinic	8/15/2017	8/15/2017	10/20/2017	Edit	Delete

Add Evidence to Selected Activities   **Add Reflection to Selected Activities**

Evidence

	Title	Type	Related To	Start	End		
☐	Community Service at Clinic	Community Service	CPD Goals	10/27/2017	11/26/2017	Edit	Delete

Add Reflection to Selected Evidence

Reflections

Title	Related To	Date		
Initial Reflection	CPD Plan (Initial Reflection)	10/20/2017	Edit	Delete
Reflection for Screening Clinic	CPD Activities	10/27/2017	Edit	Delete

MMH-Pharmacy PGY1- Preceptor in Training & Professional Development Plans 2018-2019

Preceptor Name: _____Advisor: _____ Date reviewed: _____Initials:_____

See PGY1 Residency Manual Appendix E: Preceptor Development Plans as related to ASHP Standard 4.4

I.		Continuing Professional Preceptor Development (CPPD) *(Preceptor to insert dates of completion and update document)*	
A. Self-Directed	Date: _____ Initials: _____	☐ Annually update their Professional and Academic Record	Include Documentation of Continuing Professional Development
			Include specific external CEs or programs related to Preceptor Development
			Update with certifications or areas of expertise related to area of practice
		☐ Review MMH PGY1 Specific Items	Review MMH PGY1 Program Manual
		☐ Review ASHP PGY1 Specific Items	Review ASHP website for updates to PGY1 standards, Communique updates, Preceptor Toolkit, etc (https://www.ashp.org/Professional-Development/Residency-Information/Residency-Program-Directors)
B. Active Involvement	Date: _____ Initials: _____ _____(RPD)	☐ Attend 75% or more of MMH Preceptor Meetings and Annual PGY1 Summit	
		☐ Facilitate & Lead at least 1 or more topic discussion during PGY1 Orientation Series Date: _____ Topic: _____ *(1/2 day Project for Lead Facilitator)*	
		☐ Facilitate & Lead 1 topic discussion on a Preceptor Development topic at either a Preceptor Meeting or Annual Summit (10-15 minute discussion)	
		☐ Serve as an Advisor for at least 1 PGY1 Activity (MUE, formulary review, CE presentation, QI project) optimization pertaining to areas of interest/specialty *(Project time: MUE: 2 days, QI project: 4 days, CE: 2 days, Formulary: 1 day per review)*	Describe:
		☐ Attend 75% or more of PGY1 Residents Presentations and provide qualitative feedback to residents on evaluations	
		☐ Provide feedback at Summit for potential revisions for Program Design, Program Manual, TE Grid	
		☐ Develop and present at least 1 presentation to GME or Leadership *(Project time: 2 days for New GME lecture, 1 day if revising previous)*	
		☐ Other: (recruiting, preceptor advisor, present at conference) Describe:	
C. LE Specific	Date: _____ Initials: _____ _____(RPD)	☐ Complete Summative Evaluations Timely as outlined in Program Manual	
		☐ Primary Preceptor: Revise LE description annually, at least 3 months prior to next resident cycle	Review LE Feedback from PGY1 residents Primary Preceptor to coordinate revisions with co-Preceptors Revise in *PharmAcademic*
		☐Revise related APPE student syllabus as needed, evaluating for opportunities of layered learning model	
		☐ Revise/Develop rubrics for learning activities for PGY1 residents to use for feedback	
D. Other	Date: _____ Initials: _____	☐ Maintain active membership in _____(organization)	Describe:
		☐ Obtain/ Maintain/ Renew advanced certification	Describe:

Revised 5/15/2018

MMH-Pharmacy PGY1- Preceptor in Training & Professional Development Plans 2018-2019

Preceptor Name: _____Advisor: _____ Date reviewed: _____Initials:_____

Lee Memorial Health System
Pharmacy Department

Continuous Professional Development (CPD)

CPD is a self-directed, ongoing, systematic and outcomes-focused approach to learning and professional development.

Pharmacists who adopt a CPD approach accept the responsibility to fully engage in and document their learning through reflecting on their practice, assessing and identifying professional learning needs and opportunities, developing and implementing a personal learning plan, and evaluating their learning outcomes with the goal of enhancing the knowledge, skills, attitudes and values required for their pharmacy practice.
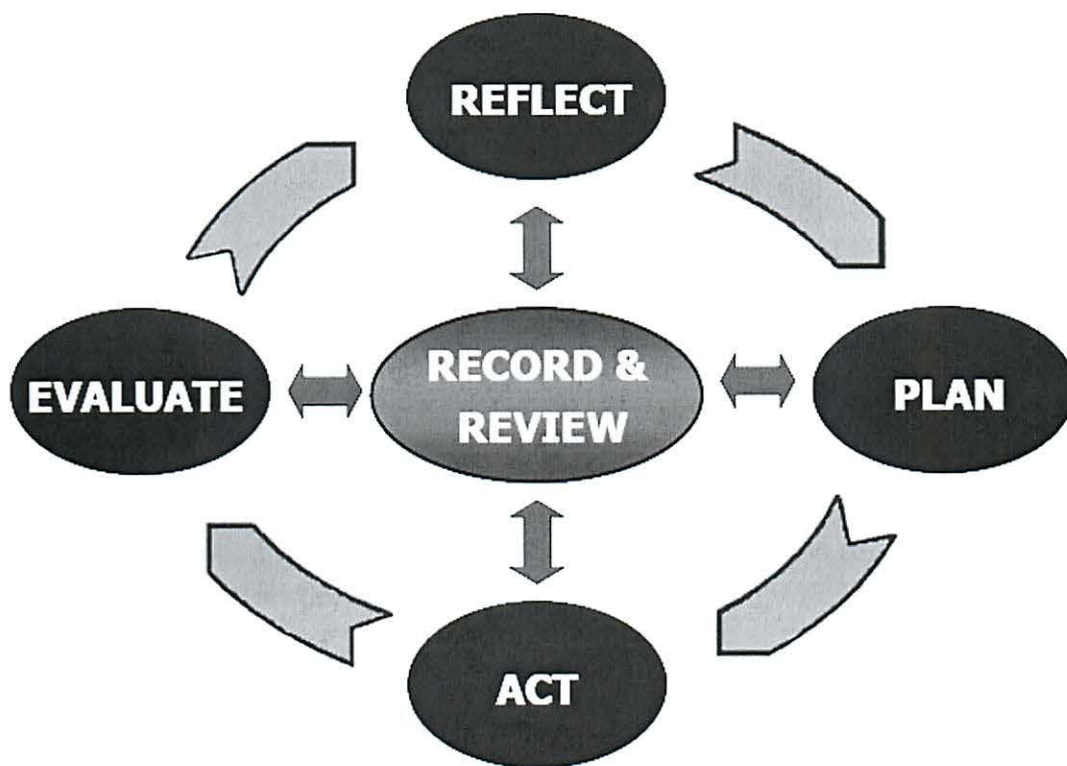
LMHS PHARMACY PLAN FOR CPD
- Pharmacy department education – staff meetings September 2011
- Employee completes H-PILS assessment tool
- Employee completes self reflection tool
- Employee completes initial plan with at least (3) specific goals by date assigned by Director for use during annual performance evaluation process
- Pharmacy Director/Supervisor approves plan as part of evaluation process
- Follow-up education on ACT and EVALUATE steps at January staff meetings

Owner: S Kessinger, S Turner
Sept 1, 2011/updated Oct 1, 2011.

THE HEALTH PROFESSIONALS' INVENTORY OF LEARNING STYLES (H-PILS)

Think about a few recent situations where you had to learn something new to solve a problem. This could be any kind of situation: While you were taking a course at school, learning to use new software, or figuring out how to assemble a barbecue.

Now, circle the letter in the column that best characterizes what works best for you in situations like the ones you've thought about.

When I'm trying to learn something new	Usually	Sometimes	Rarely	Hardly
1. I like to watch others before trying it for myself.	B	D	C	A
2. I like to consult a manual, textbook or instruction guide first.	B	C	D	A
3. I like to work by myself rather than with other people.	A	C	B	D
4. I like to take notes or write things down as I'm going along.	B	C	D	A
5. I'm critical of myself if things don't work out as I hoped.	B	C	D	A
6. I usually compare myself to other people just so I know I'm keeping up.	B	D	C	A
7. I like to examine things closely instead of jumping right in.	B	D	C	A
8. I rise to the occasion if I'm under pressure.	C	A	B	D
9. I like to have plenty of time to think about something new before trying it.	D	B	C	A
10. I pay a lot of attention to the details.	B	C	A	D
11. I concentrate on improving on the things I did wrong in the past.	C	A	D	B
12. I focus on reinforcing the things I got right in the past.	B	D	A	C
13. I like to please the person teaching me.	D	B	A	C
14. I trust my hunches.	D	C	A	B
15. I'm usually the first one in a group to finish whatever we're doing.	A	C	D	B
16. I like to take charge of a situation.	C	A	B	D
17. I'm well-organized.	B	A	C	D

Now, add up the number of times you circled each letter.

A = _____   B = _____   C = _____   D = _____

Your DOMINANT learning style is the letter you circled most frequently.
Your SECONDARY learning style is the next most-frequently circled letter.

Owner: S Kessinger, S Turner
Sept 1, 2011/updated Oct 1, 2011.

A= Accommodator

You enjoy dealing directly with people and have little time or patience for indirect or soft-sell jobs. You enjoy looking for, and exploiting, opportunities as they arrive, and you have an entrepreneurial spirit. You learn best in a hands-on, unencumbered manner, not in a traditional lecture-style format. Though you don't take any particular pleasure in leading others, you do so because you sense you are best-suited for the job. You are confident, have strong opinions and value efficiency. You are concerned about time and like to see a job get done. Sometimes, however, your concern with efficiency means that the quality of your work may suffer and you may not be paying as much attention to others' feelings and desires as you ought to.

B= Assimilator

You generally prefer working by yourself, at your own pace, in your own time, or with a very small group of like-minded people. You tend to avoid situations where you are the center of attention, or you are constantly being watched—you prefer to be the one observing (and learning) from others. You have an ability to learn from your own, and others', mistakes. You place a high priority on getting things done properly, according to the rules but, at times, you can be your own worst critic. You value organization and attentiveness to detail.

C= Converger

You are focused, practical and to the point. You usually find yourself in a leadership role and enjoy this challenge. You have little time or patience for those who dither or are indecisive or who spend too much time on impractical, theoretical matters. You are good at coming to quick, decisive conclusions, but you recognize that at times your speed may result in less than perfect results. You would rather get a good job done on time than get an excellent job delivered late. You like being in a high-performance, high-energy, fast-paced environment.

D = Diverger

You enjoy out-of-the-box environments where time and resources are not particularly constrained. You have a flair for keeping others entertained and engaged, and sincerely believe this is the way to motivate others and get the best out of everyone. You are most concerned—sometimes too concerned—about how others perceive you, and you place a high priority on harmony. You find little difficulty dealing with complex, ambiguous, theoretical situations (provided there is not a lot of pressure to perform), but sometimes you have a hard time dealing with the practical, day-to-day issues.

Owner: S Kessinger, S Turner
Sept 1, 2011/updated Oct 1, 2011.

STEP 1: REFLECT

Find some personal time and "dig deep "for personal reflection on:
- How you perceive yourself as a person
- How you perceive yourself as a professional
- The current and future status of your professional practice/environment
- Your own knowledge and skills

Identify your learning preferences (complete H-PILS assessment)

Identify learning needs and opportunities based on your own situation, personal needs and desires, opportunities and goals
- Address several competency areas, not only knowledge (ex. leadership, communication, teamwork, healthcare issues)

Strengths	Weaknesses
List work-related situations from the past year in which you felt confident or competent.	List work-related situations from the past year that you need to feel more comfortable or competent to perform.
What knowledge/skills contributed to the successes above?	What makes me feel uncomfortable in my daily routine at work?
What tasks do others come to you for help or see you as the expert in?	What makes you feel unsafe in your practice?
What strengths do I see in myself as a pharmacist?	What tasks do you perform that you perceive to be risky or that you wish you could handoff off to another?
	What knowledge or performance gaps do you recognize in yourself?

Opportunities for Development

What knowledge/skills, attitudes or values do you need to work on or acquire for the coming year? **Knowledge Skills Attitudes Values**

What knowledge/skills would you want to develop or improve to better manage uncomfortable practices or tasks in the future?

What drugs, disease therapy management, or clinical skill(s) do you wish you knew more about? Is there something you wish to be an expert at?

What areas of improvement do your colleagues or supervisor recommend for you? Have you recently received feedback on something you do well or something you need to improve upon?

What opportunities do I have to develop myself as a professional or person?

STEP 2: PLAN

- Develop a personal action plan to accomplish your learning needs identified during the REFLECT step
- Develop individual goals: Frame some learning objectives with specific outcomes in mind
- Identify and set priorities
- Develop a timeline with your action plan
    - Short-term: one year plan
    - Long-term: three to five year plan
- Identify activities to help you meet your learning objectives:
    - o Use a variety of learning methodologies and activities
    - o H- PILS
- Identify resources needed to accomplish your individual goals: can include formal CE, CE with other disciplines, readings, short courses, discussions with colleagues who are expert in that area
- Develop at least (3) Goals in the SMART format–review these with your supervisor during your annual performance evaluation and have them approved. (see attachment)
    - **S**pecific - be precise about desired achievement
    - **M**easurable - quantify objectives
    - **A**chievable –Ensure realistic expectations
    - **R**elevant –Align with practice and/or organizational goals
    - **T**imed –State when objective will be achieved

    Tips for writing SMART goals:
    State to yourself…"when I complete this learning activity, I want to be able to….."

    Vague: Know more about monitoring anticoagulation therapy
    SMART: Describe lab tests used to effectively monitor patients on warfarin, heparin and low-molecular weight heparin by April 2012

    Use action words in your objectives
        Knowledge: identify, describe, list, state
        Comprehension: compare, explain, interpret, define
        Application: apply, demonstrate, develop, plan
        Analysis: compare, analyze, recognize
        Synthesis: create, formulate, construct
        Evaluation: evaluate, choose, assess, decide

    Each goal may not fit *exactly* into the SMART format. The purpose of using the SMART format is to assure that you take the time to plan your goals and write the goals in a format that will enable you to be successful.

LMHS Pharmacy Department: PERSONAL CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD) PLAN		
SMART* LEARNING GOAL	**RESOURCES & PLANNED ACTIVITIES**	**DATES**
<u>Goal One:</u> To understand the clinical uses, side effects and appropriate management strategies of dabigatran, rivaroxaban and apixaban by February 2012. Be able to apply the knowledge gained to provide drug information to other healthcare providers and patients.	Attend the LMHS CE program on October 11, 2011: *Changing Course in the Road of Anticoagulation Therapy: An Update on Novel Oral Anticoagulants*	Start Date: Goal Date Actual Finish:
<u>Goal Two:</u> To understand the risk factors, transmission methods, treatment guidelines and complications of C. Difficle (by March 2012). To be able to compare efficacy, side effects and costs of the different treatment options (by June 2012). Use this knowledge to educate healthcare providers on ways to decrease the incidence and to promote the best therapy for treatment of C. Difficle.	• Complete the LMHS Webinar and post-test on C.Difficle. • Review current IDSA guidelines for C.Difficle.	Start Date: Goal Date Actual Finish:
<u>Goal Three:</u> Identify three major causes of medication errors at LMHS (system or specific campus) by March 2012. Make at least one specific recommendation for an improvement to the LMHS medication use process to the Medication Safety Committee by July 2012.	• Participate in the campus specific medication error team meeting • Investigate 10 errors that occur at my campus • Present an article from the literature on medication safety at a staff meeting	Start Date: Goal Date Actual Finish:

* **Specific** - Be precise about desired achievement **Measurable** - Quantify objectives **Achievable** –Ensure realistic expectations **Relevant** – Align with practice and/or organizational goals **Timed** –State when objective will be achieved

EMPLOYEE:_____   Employee ID: _____

Approved by: _____   Date: _____

EXAMPLE

Owner: S Kessinger, S Turner
Sept 1, 2011/updated Oct 1, 2011.

LMHS Pharmacy Department: PERSONAL CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD) PLAN		
SMART* LEARNING GOAL	RESOURCES & PLANNED ACTIVITIES	DATES
		Start Date:
		Goal Date
		Actual Finish:
		Start Date:
		Goal Date
		Actual Finish:
		Start Date:
		Goal Date
		Actual Finish:

* **Specific** - Be precise about desired achievement **Measurable** - Quantify objectives **Achievable** –Ensure realistic expectations **Relevant** – Align with practice and/or organizational goals **Timed** –State when objective will be achieved

EMPLOYEE:_____   Employee ID: _____

Approved by: _____   Date: _____

CPD SMART Goal Ideas for FY12 Pharmacists goals

LEE MEMORIAL
HEALTH SYSTEM

SMART Goal Ideas (not in SMART Goal format):

- Identify major causes of medication errors in the ambulatory setting in order to refine current LMHS medication error reporting system by July 2012.

- Compare and differentiate between the older and newer available oral and injectable anticoagulant agents and how they are to be effectively monitored

- Register as MTM Pharmacist in order to effectively provide MTM services by April 2012

- Review current guidelines for DM, HTN, CHF in order to properly recommend medications and provide MTM services per LMHS Health Plan Formulary by April 2012

- Describe current laws regarding Modified Class II Pharmacy licensure and be able to differentiate between various types of pharmacy licenses in FL by April 2012

- Evaluate current time management skills and develop a plan to use work time in a more productive fashion

- Demonstrate improvement in public speaking skills by giving a formal presentation to a group of at least 5 attendees (peers, coworkers, patients)

- Achieve certification as a certified geriatric pharmacist and apply knowledge of drug therapy principles for older adults (http://www.ccgp.org/)

- Enroll in and participate and/or complete formal study leading to a qualification (BCPS, BCOP, CDE, etc.). Any course of assessed study leading to a qualification that is relevant to your specialty and professional interest.

- Develop confidence in my patient counseling skills by learning to interpret the patient's level of understanding and avoid using medical terminology.

- Learn to effectively communicate with other members of the healthcare team and work collaboratively toward improved patient outcomes.

Owner: S Turner
Date 9/6/11/ edited 9/13/11 jaa: 10/2/11 ST

An example of a SMART Goal with resources and planned activities identified

Describe the process steps included to perform medication reconciliation and a comprehensive medication regimen review by March 2012. Demonstrate application of medication regimen review into the medication reconciliation process and formulating a patient specific care plan to remedy drug related problems that are identified by June 2012.

Sample resources:

a) Medication Therapy Management Training: Designing Your Patient-Centered Practice
14.25 Free CE Hours Expires 3/14/12
https://www.papharmacistcare.com

b) Introduction to the Medication Regimen Review Process – Parts 1-2-3
The Consultant Pharmacist

c) Delivering Medication Therapy Management Services in the Community

http://www.pharmacist.com/AM/Template.cfm?Section=Delivering_Medication_Therapy_Management_in_the_Community

Ideas for activities and resources for consideration to achieve SMART Goals

- Short training courses and workshops. Courses and workshops that are aimed at raising the levels of your skills and competencies.
- Mentoring: mentoring and coaching others/receiving help from a mentor or coach.
- Part-time teaching.
- Training undertaken as part of an LMHS development program (ex. Emerging Leaders)
- Leading in-house training courses and seminars, promotion and appraisal.
- Specific projects which involve new interaction with other departments and functions.
- Private study: learning new and developing existing job-related skills. Reading manuals, books, website material and periodicals.
- Authorship: authorship of articles, periodicals and books on subjects related to the pharmacy practice
- Conferences and exhibitions: attendance at conferences and exhibitions related to pharmacy practice
- Contribution to the pharmacy community: take an active role in SGSHP, FSHP or ASHP. Participation on Councils, Section Advisory Groups or leadership positions.

What would you do if you knew you couldn't fail?
Creating S.M.A.R.T. Goals
From Paul J. Meyer's "Attitude Is Everything."

You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow and expand to match them. When you list your goals you build your self-image. You see yourself as worthy of these goals, and develop the traits and personality that allow you to possess them.

SMART Goals	Goal Needs Work	Goal is Much Better
Goals should be **specific**.	I want to work with people.	I want to plan social and educational programs for children and adolescents.
Goals should be **measurable**. Have a yardstick for measuring outcomes.	I want to do well in my classes.	I want to earn a 3.00 GPA this year with no grade below B.
Goals should be **attainable**. Draft realistic goals that challenge you	I want to earn my law degree within one year of graduation.	I want to earn my law degree within 3 years of graduation.
Goals should be **relevant**. Make sure each goal is consistent with other goals you have established and fits with your immediate and long-range plans.	I wish to thoroughly review each career listed in the *Occupational Outlook Handbook*.	I will spend time in the Career Resource Lab researching careers associated with my Communication major.
Goals should be **time bound**. Give yourself time to achieve your goals.	I will graduate.	I will graduate in four years by taking 15 hours a semester

Specific - A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six "W" questions:

*Who: Who is involved?
*What: What do I want to accomplish?
*Where: Identify a location.
*When: Establish a time frame.
*Which: Identify requirements and constraints.
*Why: Specific reasons, purpose or benefits of accomplishing the goal.

Measurable - Establish concrete criteria for measuring progress toward the attainment of each goal you set. To determine if your goal is measurable, ask questions such as......How much? How many? How will I know when it is accomplished?

Attainable - When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them.

Realistic - To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. Your goal is probably realistic if you truly *believe* that it can be accomplished.

Time Bound - A goal must have a target date. If you desire to make a million dollars, but don't set the timeline for it, it won't be motivating. A deadline too far in the future is too easily put off. A goal that's set too close is not only unrealistic, it's discouraging.

Long Term Goals: long term goals are simply a description of what you want for yourself in the future -- say about 3 to 5 years out. The best way to define them is to give examples: graduate college, get a good job, find a life partner, get rich quick, etc... A goal is not a plan, it's more like a wish list with (hopefully) a basis in reality.

Then set short term goals to reach that plan.

What can I do 6 months from now?
What can I do 6 weeks from now?
What can I do today?