

# Preceptor as Evaluator

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# Preceptor as evaluator

## Objectives

1. Describe characteristics of evaluation and discuss why it is important
2. Identify parts of the evaluation schema
3. Recognize potential evaluation pitfalls
4. Outline a practical system for effective evaluation

# Definition of evaluation

1. To determine or fix the value of
2. To determine the significance, worth, or condition of usually by careful appraisal and study

(Evaluate. *Merriam-Webster.com*. Merriam-Webster, n.d. Web. 8 Sept. 2015. Retrieved from <http://www.merriamwebster.com/dictionary/evaluate>.)

# Evaluation: why is it important?

- A basic expectation of teaching
- It enhances the quality of the learning experience
- It sets the stage for future professional growth

# Evaluation: what is it?

## Evaluation session

- Scheduled, formal session between the learner and preceptor

## Evaluation process

- The complete educational experience - from program expectations to ongoing observation and behavior-specific feedback

## Assessment

- Ongoing process of collecting information about the learner's current level of knowledge, skills and attitudes

## Feedback

- Providing information for ongoing observations and assessment to the learner

# Evaluation session

- Designed as a formal opportunity to discuss expectations between the learner and preceptor
- This scheduled time is important because often the expectations are quite different
- Encourage the learner to come to the meeting with questions to ask regarding expectations
- As the preceptor, be open and ready to listen to the learner's expectations. Be prepared to provide the learner with listed expectations

# Evaluation process

Explain to the learner that

- She/he will be observed to determine if expectations are being met
- The evaluation process is on-going
- Specific and behavioral feedback will be provided

# Assessment

Explain to the learner that

- Information will be collected throughout the process. Be clear on what types of information will be collected
- This information will include current level of knowledge base, along with associated skills and attitudes

# Feedback

- Designed to be an ongoing process
- May be formative or mid-way through process. Observations and assessments from the beginning to the middle of the process will be made and shared with the learner
- May be summative or provided at the end of the process. Summative may contain total process, including mid-way evaluation

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
TIMING	timely	scheduled
SETTING	informal	formal
BASIS	observation	observation
CONTENT	objective	objective
SCOPE	specific action	global performance
PURPOSE	improvement	“grading” & improvement

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
TIMING	<p>timely</p> <p>Feedback is often informal – fit in at appropriate, brief sessions, into a busy workday</p>	<p>scheduled</p> <p>Evaluation sessions are usually performed in a more formal setting by sitting down for a more official review. Consider conducting evaluations on a set schedule, such as weekly. At a minimum, conduct mid-point and final evaluation conferences</p>

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
SETTING	<p>informal</p> <p>Clinical setting where the learning is taking place</p>	<p>formal</p> <p>Conducted 1:1 in a quiet space away from the potential interruptions of the work place</p>

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
BASIS	observation  Discuss actions that are witnessed “just in time” in the clinical setting	observation  Discuss patterns of behavior as part of the formal evaluation process and is broader in scope

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
CONTENT	<p>objective data example</p> <p>You notice the learner using a water filled syringe to check for NG-tube placement. Discuss the proper method to check for NG-tube placement and implications of incorrect actions to check placement</p>	<p>objective data example</p> <p>You notice the learner gets anxious when calling providers and forgets clinical details. Discuss ways to reduce anxiety and pertinent information to include when talking with providers</p>

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
SCOPE	<p>specific actions</p> <p>Addresses immediate concerns to prevent patient injury or harm or to encourage the learner on job well done</p>	<p>global performance</p> <p>Discussion of cumulative objective data witnessed by the evaluator during the evaluation period. Goal is to provide guidance to improve overall performance</p>

# Comparing feedback and evaluation

	FEEDBACK	EVALUATION
PURPOSE	<p>improvement</p> <p>Formative - takes place during clinical practice with the intention of improving performance on an ongoing basis</p>	<p>“grading” and improvement</p> <p>Assumptive - draws from lessons learned during the clinical practice at a later point in time. Makes a judgement value based on performance set against pre-determined objectives for proficiency</p>

# Evaluation: what can go wrong?

- **Halo effect** - one unrelated but outstanding characteristic has an effect on other aspects of evaluation
- **Oops** - learner's performance is inadequate, but unable to recall specific instances
- **“But you never told me that!”** - Discuss evaluation criteria as early as possible and give ongoing feedback on areas in need of improvement
- **Lake Wobegon Effect** - Some preceptors consider that if they give all learners a high evaluation in spite of their performance then everyone should be happy

# GRADE strategy: G

## Get ready

- Review expectations
- Review evaluation form
- Consider unique opportunities/challenges of your area
- What are the expectations for the learner?

# GRADE strategy: R

**R** Review expectations with learner

- Meet early in the experience
- Determine knowledge/skill level
- Review goals
- Describe the evaluation process

# GRADE Strategy: A

## **A**ssess

- Observe
- Record
- Provide feedback regularly
- Have learner do a self-assessment

# GRADE Strategy: D

**D**iscuss assessment at midpoint

- Formal meeting
- Learner and evaluator fill out form in advance
- Compare evaluations together
- Discuss differences and how expectations are being met

# GRADE Strategy: E

**E**nd with a “Grade”

- Complete evaluation in advance
- Schedule sufficient time
- Support your evaluation with examples
- Highlight items that can be worked on in the future

# The paper work principles

1. Be familiar with the form and review the paperwork before the experience begins
2. Write comments that support the evaluation. Comments should be specific— positive attributes and strengths as well as reviewing areas for improvement
3. Do it sooner rather than later. Gets most of the work out of the way before the learner has left and the experience is still fresh in the mind

# Evaluation: making it work

- Evaluation is an ongoing process that begins before the learning experience starts and continues throughout the experience
- Evaluation process improves quality of educational experience and contributes to satisfaction of learner and preceptor
- Utilizing the GRADE approach helps accomplish this vital integration
- Process for guiding and contributing to the growth and development of future colleagues in the health profession

# References

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