

Setting Expectations –

II. Clarifying Expectations

Introduction

For the community preceptor, teaching is not a full-time job. When there are long periods of time between precepted rotations, it can take a few days to get back into the routine of teaching. Yet those first days of a rotation are critical for helping a learner adapt to a new practice environment and a new preceptor.

Developing a system for orienting and clarifying expectations with a learner can help each rotation get off to a good start. While the first day of a rotation (usually Monday) is almost always hectic, taking the time to orient the learner on that first day saves the preceptor time and energy the rest of the rotation by preventing learner mistakes and unintended transgressions of office norms. A systematic orientation also helps a preceptor tailor the rotation to different learners' particular needs. And it provides a framework for giving learners feedback and evaluating them.

This series of documents will briefly explore the four steps of setting expectations:

- 1) Orienting learners to the logistics of the practice and rotation,
- 2) Setting expectations of the learner's performance,**
- 3) Selecting mutually-agreeable rotation objectives, and
- 4) Providing feedback about whether they are meeting the set expectations.

Example

It is Tuesday evening and you are catching up on paperwork. On your calendar you see that you have a third-year medical student coming Monday for a four-week rotation, Lisa Jones.

Several months ago, the arrival of your last student coincided with a particularly busy morning at the hospital. You were delayed getting into the office and the student spent an hour reading magazines in the waiting room. You were pleased with his clinical skills, but as you filled out his evaluation form at the end of the rotation, you realized you had not observed him in some of the categories listed on the form. When you asked for his feedback about the rotation, you were surprised to hear he had wanted learn more about managing chronic back pain; this request would have been easy to meet had you known his interest.

II. Clarifying Expectations

Once the learner knows the way around the practice and you have developed a sense of his or her level, it is time to clarify expectations of learner performance.

While many components of the learner orientation can be delegated to other staff in the office, it is important that the learner discuss expectations directly with the primary preceptor. You are responsible for guiding his or her clinical education and for completing the evaluation.

There are three parties whose expectations are relevant for your learner's rotation: those of the school or residency, the learner, and you.

The clearer you can be in discussing expectations of learners, the more likely they are to meet them -- and the easier it is to hold them accountable if they fall short of the expectations.

The School or Residency

The school or residency's expectations are laid out in its course curriculum objectives, which the course director usually sends preceptors before the rotation starts.

School or Residency Expectations:

- Course objectives
- Evaluation criteria

The Learner

It helps you to know what knowledge, skills, or attitudes the learner wants to develop or further hone during this rotation. To the extent that learners take an active part in defining their learning objectives, they may be more likely to recognize the rotation's relevance to their needs, and be more motivated. At the same time if the learner has an unrealistic expectation for the rotation, such as performing advanced procedures on his or her first rotation, now is the time to recognize it and help the learner identify more realistic objectives.

Learner Objectives

- Specific knowledge, skills, attitudes sought
- Grade expectations

Preceptor Expectations

You have many expectations about how learners will act. Spend some time thinking about the unique learning opportunities available at your practice and what your expectations are of the learner. Below are some guidelines for topics to cover.

Learners need to know when they are expected in the office, whether they will have evening and weekend call, and what sorts of activities are expected beyond seeing patients in the practice. Let learners know if they are expected to round with you at the hospital before going to the practice each morning, and who they should spend time with on your days off or when you are out of the office. They also need to know how much responsibility they will have in seeing patients. Furthermore, learners need instruction on your office policies, such as whether they should dictate chart notes or write them, and how long they are expected to spend with each patient.

Perhaps less readily identified are the expectations you have regarding the values and attitudes a learner will demonstrate. For example, you might tell a learner that it is important to you that he or she addresses patients' perceived needs as well as identified clinical needs. Or you might tell learners they are expected to try to get to know the patients beyond their clinical problems. In what ways do you expect learners to show patients and staff respect?

Included in this discussion should be your expectations of the preceptor/ learner interaction. When presenting cases, you may prefer that learners go through all of the history and physical exam findings, or that they skip negative findings (depending on their skill level).

Explain when you plan to give learners feedback about their performance: during case presentations, at the end of the day, and/or in weekly reviews. Describe your mid-term evaluation process.

Preceptor Expectations

- Daily routine: hours, call
- Office policies: dictation, which patients seen
- Values: interaction with patients, staff
- Preceptor and learner interaction: how to present cases
- If a problem arises: absentee policy, emergency contact
- Rotation objectives based on practice's unique learning opportunities

References

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