MENTORING VS. COACHING VS. PRECEPTING: WHAT’S THE DIFFERENCE?

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DISCLOSURE

The speaker has no actual or potential conflicts of interest
OBJECTIVES

1. Compare and contrast the purpose and responsibilities associated with precepting, coaching, and mentoring.

2. Describe methods used to facilitate conversations as a preceptor, coach, and mentor.

3. Identify communication strategies that can be employed in challenging situations.
FAMOUS TEACHING RELATIONSHIPS

What do these mentors have in common?

http://wandervogeldiary.files.wordpress.com/2014/05/mr-miyagi-the-karate-kid-630-75.jpg?w=655
PRECEPTING
What are attributes of a “good” preceptor?
A PRECEPTOR…

- Sets Expectations
- Provides Feedback
- Displays Passion
- Is Confident, yet Humble
- Challenges the Learner
- Seeks Learning Activities

FOUR FACETS OF PRECEPTING

• Set expectations
• Create structured & informal learning activities
  • Topic discussions
  • Journal clubs
• Provide the learner autonomy
• Evaluate performance & deliver feedback

THE LEARNING PYRAMID

- Foundational Skills and Knowledge
- Practical Application
- Culminating Integration
- Direct Instruction
- Facilitating
- Coaching
- Modeling

APPRENTICESHIP MODEL

I do it
I do it and you watch
You do it and I watch
You do it

Maxwell JC. Mentoring 101.
THE ONE MINUTE PRECEPTOR

Have the student commit to an assessment/plan

Require evidence

Teach concepts that can be applied elsewhere

Provide positive feedback

Give constructive feedback

COACHING
A COACH IS...

• “Someone who helps another person reach higher effectiveness by creating a dialogue that leads to awareness and action.”

• An individual who helps another come to their own decision

• An observer, a guide
COACHING

• Assists an individual in reaching goals faster

• Several types of coaching:
  • Peer
  • Career
  • Performance
  • Life
  • Health

Whitworth L, et al.. Co-Active Coaching, New Skills for Coaching People Toward Success in Work and Life
CO-ACTIVE COACHING MODEL

- Develop a connection
- Listen/communicate effectively
- Keep the end goal in sight
- Ask powerful questions
- Build self-awareness and self-esteem
- Recognize their whole life

Whitworth L, et al. Co-Active Coaching, New Skills for Coaching People Toward Success in Work and Life
CO-ACTIVE COACHING MODEL

- Acknowledge efforts
- Identify limits
- Hold the individual accountable
- Debrief learning
- Celebrate accomplishments

Whitworth L, et al. Co-Active Coaching, New Skills for Coaching People Toward Success in Work and Life
A MENTOR IS...

• “A trusted counselor guiding the professional development of an individual”

• “Knowledgeable and competent professionals who are one or more steps ahead of a trainee”
THE ORIGINS OF THE MENTOR

• The Odyssey
• Athena appeared as Mentor to Telemachus
• Provided encouragement
What are desirable qualities in a mentor?

What actions should a mentor take to ensure a successful relationship with the mentee?
SUCCESSFUL ACTIONS OF A MENTOR

- Listens
- Provides constructive feedback
- Supports and challenges the mentee
- Develops a personal relationship
- Designates time for the mentee

PRINCIPLES OF MENTORING

Focus on the needs of the mentee

Demonstrate perseverance

Mentors must give of themselves

Align passion and work

Model character
WHAT NOT TO DO

• Attempt to solve the mentee’s problems
• Violate confidentiality
• Force opinions on a mentee
• Share “war stories”
• Attempt to create a “clone”

COLLABORATION

Mentor

Mentee

Zachy LJ. The Mentor’s Guide.
How do you ensure success in a mentoring relationship?
The Mentoring Equation

Successful Mentoring Relationship is Bounded By...

\[(\text{Drive} \times \text{Distance}) \geq (\text{Gap} \times \text{Relevance} \times \text{Effort})\]
CREATING A POSITIVE EXPERIENCE

• Set expectations
  • Frequency of meetings
  • Responsibilities of mentor and mentee

• Evaluate, evaluate, evaluate
How do you incorporate direct instruction, modeling, coaching, and facilitation into your precepting?
MENTORING, COACHING, PRECEPTING: SIMILARITIES AND DIFFERENCES

**Mentoring**
- Involves sharing of knowledge
- Longer time investment
- Facilitates decisions
- Focused on the mentee

**Coaching**
- Involves questioning and assessing
- Limited investment
- Reflective listening
- Focused on tasks

**Precepting**
- Involves teaching and evaluation
- Limited time investment
- Focused on the learner and tasks

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Atul G. The New Yorker. 2011 (October 3). Available at: http://www.newyorker.com/reporting/2011/10/03/111003fa_fact_gawande
COMMUNICATION
COMMUNICATING AS A PRECEPTOR/MENTOR/COACH

• Regular contact is essential
• Set *clear* expectations early
• Ask open-ended questions
• Maintain open lines of communication
• Utilize active listening
• Be vigilant of body language

APhA and NACDS. Available at: http://www.therapeuticresearch.com/ce/documents/custom/apha_nacds.pdf
University of Pittsburgh Institute for Clinical Research Education. Available at: http://www.lcre.pitt.edu/mentoring/effective.html
THE IMPORTANCE OF FEEDBACK

• Vital to the learning experience
• Preceptors may not meet learner needs
• Meant to improve a targeted skill or behavior of the recipient
• It is not an evaluation
• Novices vs. experts respond differently

PURPOSE OF FEEDBACK

- Actual performance
- Desired performance

FEEDBACK TECHNIQUES

- Feedback Sandwich
- Pendleton Model
- Reflective Feedback Conversation

Feedback Sandwich

- Reinforcing statement
- Corrective statement
- Reinforcing statement

FEEDBACK TECHNIQUES

Pendleton Model

- Learner states what was good
- Teacher agrees and elaborates
- Learner states areas for improvement
- Teacher states areas for improvement


Pendleton D, et al. The consultation: an approach to learning and teaching...
Reflective Feedback Conversation

- Teacher asks about concerns
- Learner shares concerns and what could have been improved
- Teacher provides opinion and support
- Teacher asks learner what may improve the situation
- Learner responds
- Teacher elaborates on learner’s response

EFFECTIVE FEEDBACK

- Timely
- Scheduled
- Specific
- Straightforward
- Collaborative

PROVIDING EFFECTIVE FEEDBACK

1. Prepare learner prior to the activity

2. Provide descriptive, relevant, and objective feedback frequently

3. Avoid overloading the learner with feedback

4. Follow-up on action plans

PROVIDING POSITIVE VS. NEGATIVE FEEDBACK

Positive
- Focus on what was done well
- Encouraging

Negative
- Focus on areas of improvement
- Discuss methods for correction
- Complete in private
- “And” and “what if” vs. “but”

COMMON PITFALLS TO AVOID

• Judgmental feedback
• Insufficient “wait time”
• Lecturing inappropriately
• Close-ended questions
• Challenging learner beyond abilities
• “Sugar-coating”
• Not focusing on the learner

Quilligan S., Clin Teach 2007;4:100-105.
GROW MODEL

• Goal
• Reality
• Options
• Way Forward

PERSONAL DEVELOPMENT PLANS (PDPS)

• Plan and tracks progress against goals
  • SMART goals
• Professional and personal goals
• Important to update and assess progress with goals at regular time intervals

UW Institute for Clinical and Translational Research. Available at: https://ictr.wisc.edu/mentoring/individual-development-plan/
PDP EXAMPLE

- Name:

- Short Term Goal(s) (completion in 1-2 years):

<table>
<thead>
<tr>
<th>Skills</th>
<th>Assessment</th>
<th>Activities to improve</th>
<th>Goal Date</th>
<th>Mentor signature and date</th>
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<tbody>
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# Structural Tension Chart

<table>
<thead>
<tr>
<th>Goal/Future</th>
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<tr>
<td><strong>Action Steps</strong></td>
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**Current Reality**

*Fritz R. The Path of Least Resistance for Managers.*
QUESTIONS TO FACILITATE MEETINGS

1. What do you really want to do?
2. What do you do well that allows you to reach your goal?
3. What is preventing you from reaching your goals?
4. What will you do differently tomorrow?
5. How can I help?

COMPONENTS OF SUCCESSFUL MEETINGS

• Scheduled time at intervals determined by the mentor or mentee

• Assist the mentee in developing SMART goals
LEARNER SCENARIOS
SCENARIO #1

- TR is a learner on his clinical rotation at your site.
- He was 10-15 minutes late on the first week of his rotation.
- He was on time during the second week.
- TR is now late again on the 1st day of the third week of his rotation and is unprepared for his topic discussion today.
SCENARIO #2

• DE and GL are two students on their clinical rotation together

• Throughout the first week, you notice that DE appears to take more initiative and is more prepared for the rotation than GL
What other challenging precepting situations have you encountered?
SUMMARY

• The roles of preceptor, mentor, and coach often overlap

• Clear and open communication is key

• Feedback is essential to the development of a student/resident/mentee

• Various feedback methods exist

• Tailor the approach to the student/resident
RESOURCES


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