



# Preparing Interprofessional Coaches to Facilitate Transformational Learning

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# Session Objectives

- Explain how coaching differs from traditional teaching in the interprofessional team setting
- Describe how coaches are prepared to lead interprofessional teams to foster knowledge sharing and collaboration while working towards a common patient centered goal
- Observe and appreciate how coaches engage students to promote interprofessional collaboration in a primary care setting
- Assess interprofessional student interactions to evaluate team dynamics.

# How does coaching differ from teaching?

## COACHING

- Students set goals
- Utilizes open ended questions to direct learning
- Enables self-discovery
- Collaborative inquiry
- Transformational learning
- Focuses on changing perspectives, attitude and beliefs
- Empowers students to be change agents
- Emphasizes relationships

## TEACHING

- Provides knowledge or information
- Asks direct questions
- Teacher sets agenda and goals
- Provides answers
- Structured content delivery
- Measurable objectives
- Evaluation based on knowledge gained by student

# Transformational Learning

- “.....creating dynamic relationships between teachers, students, and a shared body of knowledge to promote student learning and personal growth.” (Slavich & Zimbardo, 2012, pg 569)
- Coaching promotes transformational learning
- Actively engage students to reflect on their beliefs and behaviors
- Fosters knowledge sharing and collaboration among students
- Propels students to work independently towards a common goal.

# Coaching Behaviors

- Set the tone and create a safe environment
- Lay the groundwork
  - What are the goals?
    - Break this into tasks initially
    - Let students decide who is best to complete tasks
    - Set a time to assess and provide feedback
- Encourages students to rely on team
  - “Who else on your team would be a good resource to help answer this question?”

# Coaching Behaviors

- Challenges students' current beliefs
  - Ask questions that make students explore other options or ideas they may not have initially considered
- Assesses student interactions
  - Intervene or redirect as needed
- Ask students to assess their teams interactions and progress towards meeting shared goals

# Coach Orientation

- Coaches were deliberately prepared with a “workshop” to identify key interactions that encourage desired student behaviors.
  - TeamSTEPPS was introduced as the theoretical framework
  - Discussed how the coaching role in the IPE clinical setting differed from being a clinical faculty with one healthcare profession focus
  - Coaches were involved in a simulation depicting patient interactions they will encounter in the primary care clinics.



# Huddle Worksheet

- Gives coaches a consistent method for directing students
- Students can start to work more independently when there is a set routine
- Good tool to orient new coaches to the role and improves their comfort level

Set up	
Meet in designated room	
All team present at designated time	
Team Check In	
Any students who have to alter schedule (leave early)	
Student concerns	
Team dynamics <ul style="list-style-type: none"> <li>• What do we need to work on today to improve collaboration</li> </ul>	
Prep - Huddle	
Patient list available (printed or electronically)	
All students aware of schedule	
Any specific patient issues or concerns identified	
Patients that should not be included, previously seen patients, etc.)	
Plan for Day	
Select which patients are to be seen	
Make a schedule and disseminate to the team	
Identify team members who will see each patient	
Develop work plan for the day: <ul style="list-style-type: none"> <li>• Today's patients</li> <li>• Patient follow-ups (phone calls, home visits, clinic visits, telehealth)</li> <li>• Review next scheduled day's schedule and call patients</li> </ul>	
Debriefing	
Care plans for today's patient completed <ul style="list-style-type: none"> <li>• Discuss the priorities/goals related to today's patient visits</li> </ul>	
Care plans for call backs updated <ul style="list-style-type: none"> <li>• Discuss the priorities/goals related to today's follow-ups</li> </ul>	
Next scheduled day <ul style="list-style-type: none"> <li>• Current patient load</li> <li>• Any repeat patients or specific concerns for the next scheduled day</li> </ul>	
Team Dynamics <ul style="list-style-type: none"> <li>• What worked well</li> <li>• What could we do better</li> </ul>	

# IPE Simulation

- Assign each coach an interprofessional student team
- Coaches and the team review their patient case study
- Coach– prepare team for patient interaction using the Huddle Worksheet, complete TPOT (after the interview)
- Student IPE team – develop a plan for interviewing patient and completing demographic form and PROMIS survey

*TeamSTEPPS*

**S**ITUATION  
What is the situation?

**B**ACKGROUND  
What is the clinical background?

**A**SSessment  
What is the problem?

**R**EQUEST/  
RECOMMENDATION  
What do I recommend / request to be done?

Structured Communication Tool

AHRQ Agency for Healthcare Research and Quality PATIENT SAFETY CHICAGO

# Interprofessional Plan of Care

**ID Number:**

**Team Name:**

**Overarching Goal:**

Date	Problems/Needs	Impact on Health/Quality of Life	Strengths/Resources	Goals	Interventions	Profession	Re-Evaluation Date

# Group Debrief

- Coach – debrief the team on their experience
  - Ask about things they felt uncomfortable with during the interview or information exchange
  - How did their experience differ than if they would have interviewed the patient alone
- Team Behavior Assessment – TPOT
  - Completed by the coach and students



**Team Performance Observation Tool**

Date: \_\_\_\_\_  
 Unit/Department: \_\_\_\_\_  
 Team: \_\_\_\_\_  
 Shift: \_\_\_\_\_

**Rating Scale**  
 Please comment if  
 1 or 2.

1 - Very Poor  
 2 - Poor  
 3 - Acceptable  
 4 - Good  
 5 - Excellent

# Team Performance Observation Tool (TPOT)

<b>1. Team Structure</b>	<b>Rating</b>
a. Assembles a team	
b. Assigns or identifies team members' roles and responsibilities	
c. Holds team members accountable	
d. Includes patients and families as part of the team	
Comments:	
<b>Overall Rating – Team Structure</b>	
<b>2. Communication</b>	<b>Rating</b>
a. Provides brief, clear, specific, and timely information to team members	
b. Seeks information from all available sources	
c. Uses check-backs to verify information that is communicated	
d. Uses SBAR, call-outs, and handoff techniques to communicate effectively with team members	
Comments:	
<b>Overall Rating – Communication</b>	
<b>3. Leadership</b>	<b>Rating</b>
a. Identifies team goals and vision	
b. Uses resources efficiently to maximize team performance	
c. Balances workload within the team	
d. Delegates tasks or assignments, as appropriate	
e. Conducts briefs, huddles, and debriefs	
f. Role models teamwork behaviors	
Comments:	
<b>Overall Rating – Leadership</b>	
<b>4. Situation Monitoring</b>	<b>Rating</b>
a. Monitors the status of the patient	
b. Monitors fellow team members to ensure safety and prevent errors	
c. Monitors the environment for safety and availability of resources (e.g., equipment)	
d. Monitors progress toward the goal and identifies changes that could alter the plan of care	
e. Fosters communication to ensure that team members have a shared mental model	
Comments:	
<b>Overall Rating – Situation Monitoring</b>	
<b>5. Mutual Support</b>	<b>Rating</b>
a. Provides task-related support and assistance	
b. Provides timely and constructive feedback to team members	
c. Effectively advocates for patient safety using the Assertive Statement, Two-Challenge Rule, or CUS	
d. Uses the Two-Challenge Rule or DESC Script to resolve conflict	
Comments:	
<b>Overall Rating – Mutual Support</b>	
<b>TEAM PERFORMANCE RATING</b>	

# Workshop Debrief

- Discuss any other interactions and what went well and what could be done differently.
- Discuss how workshop can be replicated
- Interprofessional Facilitation Scale  
Evaluation tool

# Resources

- **IPE Facilitation** – Ruiz, M.G., Ezer, H. & Purden, M. (2013). Exploring the nature of facilitating interprofessional learning: Findings from an exploratory study. *J Interprof Care* 27(6). pg 489-495
- **Transformational Learning** – Slavich, G.M. & Zimbardo, P.G. (2012). Transformational teaching: Theoretical underpinnings, basic principles, and core methods. *Educ Psychol Rev* 24(4). pg 569-608
- **TPOT** - <https://www.ahrq.gov/sites/default/files/wysiwyg/professionals/education/curriculum-tools/teamstepps/instructor/reference/tmpot.pdf>
- **IPFS** - Sargeant, J., T. Hill, and L. Breau, Development and testing of a scale to assess interprofessional education (IPE) facilitation skills. *J Contin Educ Health Prof*, 2010. 30(2): pg. 126-31