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# Individualized Learning Plan Program

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"The learning contract is without question the single most potent tool I have come across in my more than half century of experience with adult education."

Malcolm Knowles,  
*The Adult Learner: A Neglected Species.*

## Goals of the Individualized Learning Plan Program

- Encourage the habit of identifying learning needs and strategies to meet them
- Provide opportunities to practice reflection and self-assessment
- Enhance students' self-esteem and motivation by increasing awareness of learning and progress
- Create a foundation for goal-based feedback and evaluation
- Facilitate feedback by establishing a concrete schedule
- Foster collaborative relationships between students and preceptors

## Procedures

1. Meet with student at the beginning of the clerkship to establish an Individualized Learning Plan
  1. Identify goals, strategies and evidence of accomplishment
  2. Arrange a schedule for progress review and feedback
  3. Sign the Plan; make sure both student and preceptor have a copy
2. Meet according to schedule, *at least* every 6-8 weeks, to review and revise learning goals, discuss progress, and exchange feedback.
  1. Create a written Progress Report to record each meeting
  2. Sign the Report; make sure both student and preceptor have a copy
3. Progress Reports may be useful as a basis for completing written student evaluations on the web site.

## Guidelines for Developing Individualized Learning Plans

The primary goals of the Individualized Learning Plan program are 1) to provide practice in identifying learning needs and developing goals, 2) to develop a basis for regularly scheduled, goal-centered feedback, and, 3) to encourage awareness, discussion, and documentation of learning. *There is no one, correct way to use the plan.* Students and preceptors should work together to determine what works best. The following suggestions may be helpful in developing an initial plan.

- Identifying learning goals may be an unfamiliar task. Start gradually: put together a list of four or five. easy goals to begin with, then adjust the list as needed.

- The list of Learning Objectives for the clerkship may be helpful as a guide. (Students may opt to simply select goals from the list.) Note that the learning plan is not intended to reflect everything the student will learn in continuity clinic. It should serve as a point of focus.
- Ask students to consider the question, "What do you want to get out of continuity clinic...this week, this month, this year?" Students will likely need some time to contemplate. Establishing an initial plan might take a few clinic sessions. We recommend having at least a couple goals to start working on by the end of the first four weeks.
- To help students identify learning needs, consider their future career plans, their experiences working with individual patients, and your own observations of their clinical performance.
- Encourage students to assess their own clinical skills. Areas that seem weaker or more difficult can serve as a focus for learning.
- Try to include both short-term (easy-to-master) and long-term goals in the plan. In general, goals will involve acquisition of knowledge, skills, and/or attitudes. A balance among the different types of goals is ideal, but in the beginning, knowledge and skill-based goals may be easiest to manage.
- Goals may come in many forms. Some students will want to work on complex goals with multiple sub-components. Others will prefer simple goals that take the form of specific questions.
- The distinction between strategies, resources and evidence of achievement is somewhat semantic and artificial. Don't worry about *where* you enter your ideas on the form. What's important is going through the process of reflecting, discussing, and planning.
- One of the most powerful strategies for enhancing learning is direct observation by the preceptor with immediate, specific feedback on performance. As much as possible, incorporate direct observation into the learning plan as both a strategy for achieving goals and as evidence of accomplishment.
- Be creative. Choose goals and strategies that fit with the time and resources available in your setting, but err on the side of active, experiential learning and observation.
- Remember, learning plans are not set in stone. Students and preceptors should arrange to meet periodically (at least every 6-8 weeks) to review the plan, discuss the student's progress, and exchange feedback. Students should feel free to add, delete, or modify goals as necessary, based on interests, patient experiences, or other factors.
- Consider working with your student to develop a teaching and learning plan for yourself.

## Examples of Goals, Strategies, and Evidence for Individualized Learning Plans

### I. General Examples:

GOALS	STRATEGIES	EVIDENCE
Knowledge "Learn about..."	<ul style="list-style-type: none"> <li>· Experiences with patients</li> <li>· Discussion with preceptor or other clinic personnel*</li> <li>· Reading/Internet</li> </ul>	<ul style="list-style-type: none"> <li>· Didactic presentation</li> <li>· Discussion with preceptor</li> <li>· Self-quiz</li> </ul>
Skills "Learn how to..."	<ul style="list-style-type: none"> <li>· Experiences with patients</li> <li>· Modeling by preceptor or other clinic personnel*</li> <li>· Observation and feedback by preceptor or other clinic personnel</li> </ul>	<ul style="list-style-type: none"> <li>· Observation and feedback by preceptor or other clinic personnel* (actual patient or role play)</li> </ul>
Attitudes "Remember to..." "Pay attention to..." "Feel more confident about..."	<ul style="list-style-type: none"> <li>· Experiences with patients</li> <li>· Modeling</li> <li>· Observation</li> <li>· Reflection and discussion</li> <li>· Reading...</li> </ul>	<ul style="list-style-type: none"> <li>· Self-assessment</li> <li>· Preceptor's assessment</li> <li>· Patient logs/journals</li> <li>· Chart review</li> </ul>

\* Other clinic personnel that can assist students in their learning:

- Interpreters
- Nutritionists
- Social workers
- Office managers
- Financial counselors
- Nurses

## II. Case-based Examples

**CASE 1:** A fourth year medical student in your internal medicine clinic is planning to pursue an internal medicine residency. She is confused and overwhelmed with the preventative care guidelines that you apply to your patients. "I'll never get them straight!"

**Goal:** List the preventative guidelines that should be applied to a particular patient the student follows (example: 65-year-old male with diabetes).

**Strategies:** Investigate web resources for guidelines (National Guideline Clearinghouse <http://guideline.gov>), look at the practice guidelines proposed by your clinic, AHRQ Guidebook,

**Evidence:** Student records preventative care interventions in patient chart; student makes a preventative care reference chart to hang in the clinic.

**CASE 2:** Third year student follows a toddler in your pediatrics clinic who has had a fever and has been tugging at her left ear. While presenting the patient the student says, "I think the left tympanic membrane looked a little red, but I didn't really see it very well. I'm not very good at the ear exam."

**Goal:** Improve ear exam techniques in small children.

**Strategies:** Observe preceptor doing focused ear exams in several different age patients; have preceptor observe student doing the ear exam on a patient and give constructive feedback

**Evidence:** Student feels comfortable with the ear exam after six weeks of concerted attention to this part of the physical exam; preceptor observes student when she is feeling confident with the ear exam; student's notes reflect competence and comprehension of ear exams.

**CASE 3:** Fourth-year student in your family medicine clinic has spent the last three clinics finishing up notes until eight or nine pm. The next time you see him he is feeling extremely overwhelmed and stressed about his continuity clinic time commitment.

**Goal:** Learn to write concise focused clinic notes on his patients.

**Strategies:** Have preceptor review progress notes between the student's scheduled clinic days. Meet before clinic to go over constructive criticism about note writing.

**Evidence:** Student gets out of clinic one to one and a half hours earlier.

**CASE 4:** Third year student in your pediatrics clinic spends a lot of time waiting for the Spanish interpreter. Remembers some Spanish grammar from high school.

**Goal:** Learn to do anticipatory guidance for safety in Spanish.

**Strategy:** Look at *Spanish for Pediatric Medicine* (AAP). Listen to the interpreter. Take notes.

**Evidence:** Student asks an interpreter to observe him speaking with patient and give him/her feedback.

## Example Student Learning Plan and Progress Report

Your student is required to fill out a Learning Plan in consultation with you during the first two weeks of the 1<sup>st</sup>, 3<sup>rd</sup>, and 6<sup>th</sup> months. Please help the student set reasonable goals. A sample is given below with the format for a Progress Report.

### EXAMPLE INDIVIDUALIZED LEARNING PLAN FOR CONTINUITY CLINIC

#	Goal	Strategies and Resources	Evidence of Achievement
1	<b>Learn how to examine a child's ears</b>	Watch my preceptor's technique a couple	Confident visualization of the TMs
		of times.	Minimal crying (on the child's part)
		Ask my preceptor to watch me examine a number	Good feedback from my preceptor
		number of ears	
		Read about the importance of insufflation	
2	<b>Do a pap smear in a way that it makes my patients feel relatively comfortable and that is technically proficient (i.e. adequate Sample.)</b>	Ask for feedback from preceptor and	Patients report that they felt comfortable.
		patients.	Preceptor commends my gentle approach.
		Check the pathology reports on my pap	Path reports say "satisfactory sample," not
		Smears.	smear too thick, insufficient sample, or
			lacking endocervical cells.
3	<b>Improve presentation skills</b>	Elicit feedback from my preceptor about	Preceptor says that my presentations are
		my clarity, efficiency, ability to arrive at	clearer, more concise and to the point.
		assessments and plans independently	I am able to formulate an assessment and
		Videotape several presentations over the	plan independently.
		9 month clerkship period	Video proof of my increasingly polished
			presentations.

Dates for progress review meetings:      October 10      January 3      March 7      May 21      \_\_\_\_\_

Student signature \_\_\_\_\_ Date \_\_\_\_\_

Preceptor signature \_\_\_\_\_ Date \_\_\_\_\_

**EXAMPLE PROGRESS REPORT**

Meeting date	Progress toward goals	Feedback (suggestions for improvement; things to work on; new goals)
Oct 10 _____	Goal # <u>  1  </u>  <input type="checkbox"/> Accomplished <input type="checkbox"/> Ongoing	Very good effort to make the child comfortable during the exam. Examining the child while on mom's lap works well. Try to brace your hand more firmly against the child's head so that when s/he moves, you don't poke them. Save the examination of the ears until the end of your exam in case the child starts to scream
	Goal # <u>  2  </u>  <input type="checkbox"/> Accomplished <input type="checkbox"/> Ongoing	Good manual technique, with a minimum of discomfort (as reported by patients.) Try to explain what you are doing, as you are doing it, to the patients to make them more at ease. Remember to wash your hands before examining your patients.
	Goal # <u>  3  </u>  <input type="checkbox"/> Accomplished <input type="checkbox"/> Ongoing	Make eye contact with the patient while presenting in front of them. Remember to use the patient's name in your presentations. When presenting in front of a patient, try to use words that they understand, minimizing medical jargon.
	Goal # <u>      </u>  <input type="checkbox"/> Accomplished <input type="checkbox"/> Ongoing	      

Student signature \_\_\_\_\_ Date \_\_\_\_\_

Preceptor signature \_\_\_\_\_ Date \_\_\_\_\_

