

# Objectives:

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## **By the end of this presentation, participants will:**

1. Explain at least two principles related to adult learning
2. Compare and contrast the clinicians and patients' explanatory models
3. Outline the key steps for designing a patient education intervention

## **By the end of this Workshop, participants will:**

4. Identify a GOAL for their Patient Education Intervention
5. Identify learning OBJECTIVES (using Bloom's taxonomy & SMART) that are coherent with the Patient Education Intervention (PEI) they are seeking to produce
6. Create their own PEI Plan

# True or False?

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More Canadian households subscribe exclusively to mobile wireless services (20.4%) than to wireline (i.e., landline) telephone services (14.4%).

**TRUE**



While the majority of Canadians still own and use landlines, the data attests to a slow and steady shift away from this technology in favour of wireless services. Indeed, more Canadian households have **mobile phones (84.9%)** than landlines (78.9%) – a big change from only ten years ago, when just over half of Canadian households subscribed to mobile phones (**53.9%**) and almost all owned landlines (96.3%).

# True or False?

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Younger Canadians are watching significantly less traditional television than older cohorts.

**TRUE, but they use iPad!**

Between 2010 and 2014, the number of hours older Canadians (65+) spent watching traditional television each week increased by 3.5%, **whereas for Canadians 18 to 34 years of age, it declined by 12.3%.**



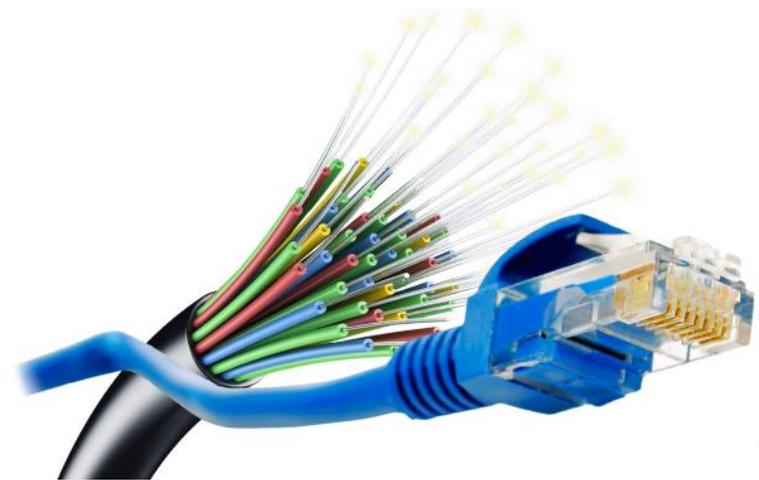
# True or False?

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Nearly all Canadians have access to broadband download speeds of at least 5 Mbps.

**TRUE**

Over the past five years, the percentage of Canadians with access to the 5 Mbps downstream speed has grown from **86% to 96%**, with **77%** of households actually subscribing to services offering this speed.



# Principles of Learning - Educational Theories

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## **Behavioural learning theory**

- Learning is acquisition of observable behaviors.
- Teacher driven; E.g.: gait lab

## **Constructivist (experiential)**

- Learner builds knowledge by integrating experiences
- Teacher facilitates mental task of reflection to create meaning. E.g.: practicing skills in a lab

## **Social learning theory**

- Learning through observation, imitation, modeling
- Teacher is a role model. E.g.: clinical teaching

## **Humanism**

- Learning through self-actualization, self-fulfillment
- Teacher is a facilitator. E.g.: IPE Sessions

## **Cognitivist**

- Learning results from making connections with prior knowledge; symbolic mental structures E.g.: concept map, professional complementary courses.

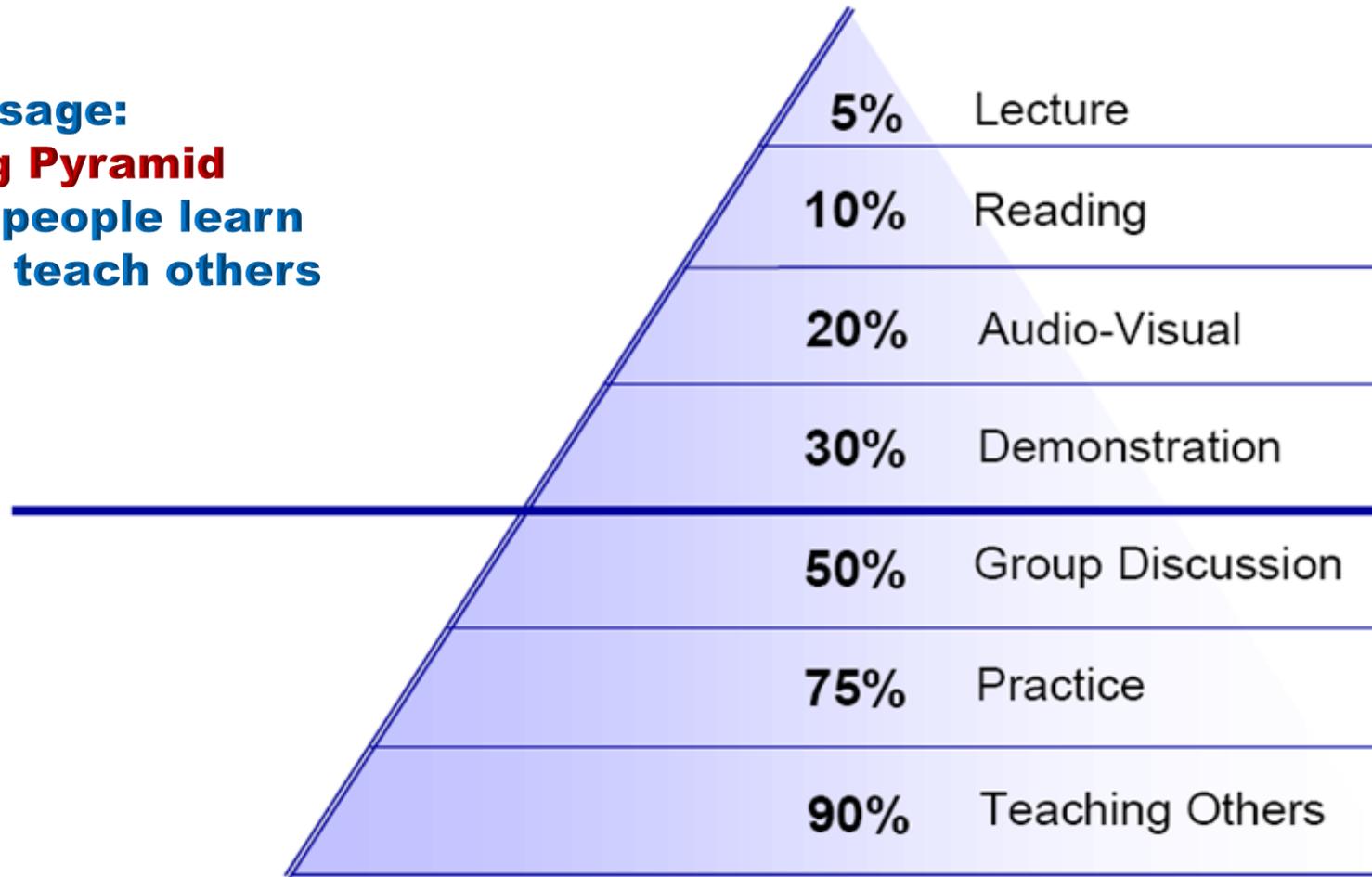
# Interaction in a Learning Setting

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- ❖ Increased learning if there is active learner involvement (Butler 1992, Kraft 1985, Murray 1997)
- ❖ Increased attention, motivation, & retention (Gage 1991, Mannison et al. 1994, Meyers et al. 1993)
- ❖ Increased learner and teacher satisfaction (Butler 1992, Ochsendorf 2006)
- ❖ Active learning tips (Silberman, 1996)
  - brain needs to link what is being taught to what is already known
  - brain needs to test, recap or explain the information to someone in order to store it.

## Average Retention Rates

**Key message:**  
**The Learning Pyramid**  
**Remember that people learn**  
**best when they teach others**  
...



\*Adapted from National Training Laboratories. Bethel, Maine

# Review of Adult Learning Principles: Why Learn About These?

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- ❖ The purpose of understanding adult learning is that the patient, and when appropriate the family, are provided with education that will enhance knowledge, skills and behavior change for improved health and well-being or prevention of disease and disability.

# The One Minute Paper...

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**What are the Characteristics of Adult Learners?**

**What are their Learning Preferences?**

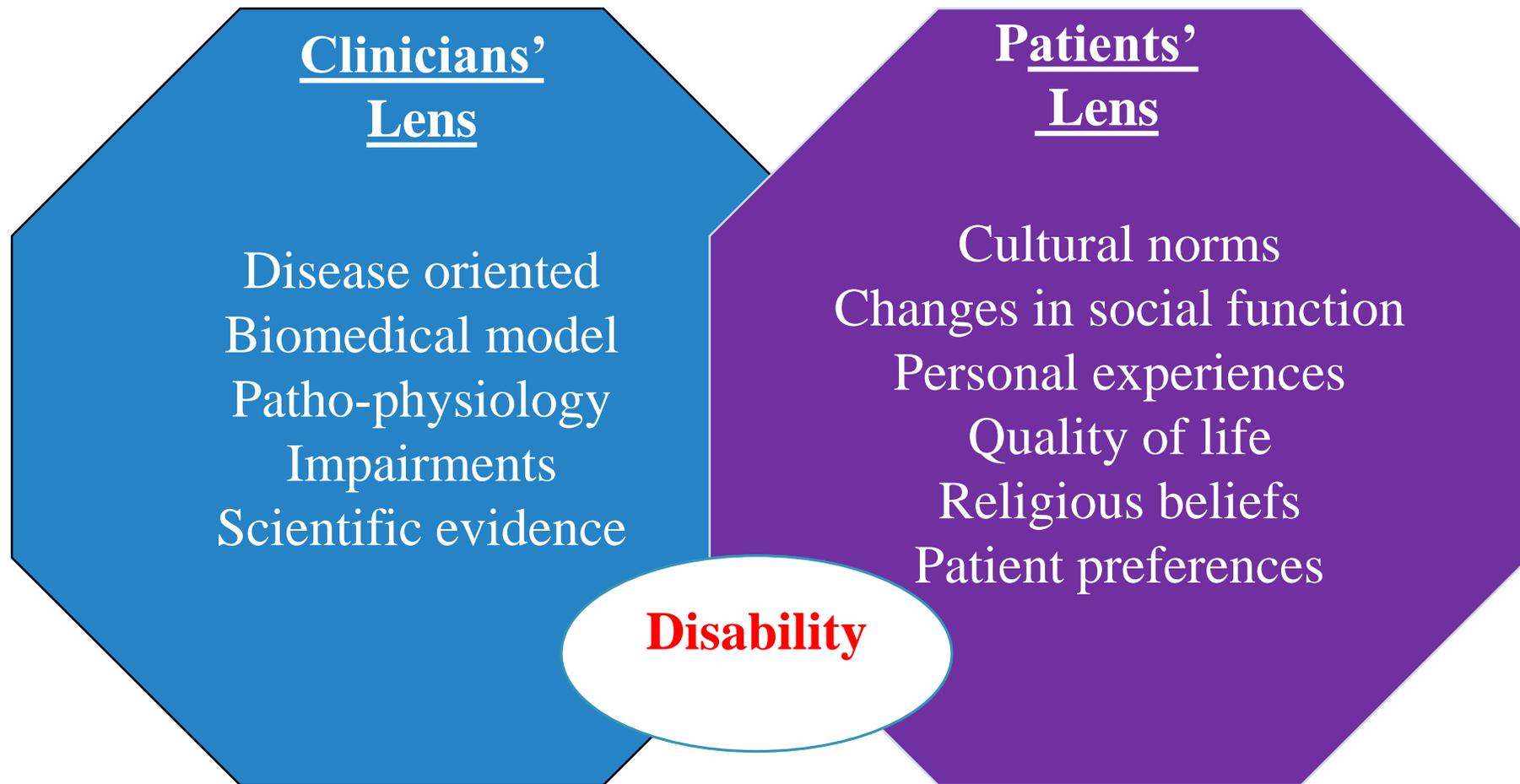
# Characteristics of Adult Learners

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- ❑ Learn continuously;
- ❑ Have a purpose for their learning;
- ❑ Very motivated and often spending own time, money and resources to learn;
- ❑ Like to stay focused and learn materials quickly and completely;
- ❑ View learning as a social process;
- ❑ Have broad base of experiences;
- ❑ Have learning needs generated by real life events;
- ❑ Self-esteem may be fragile if formal learning is distant;
- ❑ Are practical and problem centered;
- ❑ Prefer activities that promote positive self-esteem;
- ❑ Integrate new ideas with existing knowledge;
- ❑ Want to be respected as individuals and as learners;
- ❑ Have the ability to capitalize on their experiences;
- ❑ Want choice and self-direction;
- ❑ Want skills that can be applied immediately;
- ❑ May fear: Inability to “keep up”, Change, learning new concepts, away moving away from their comfort level

The key to success is simplicity & reinforcement

# Importance of Understanding the Clinicians & the Patients' Explanatory Models



# What do we typically teach?

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About disease, impairments, restrictions in activity and participation problems

About rehabilitation process

About restrictions post-surgery

About fall prevention

About home safety

About benefits of exercise and exercise programs

About the use of adaptive and mobility equipment

About staying healthy and preventing disease

About helping a child with play skills

About helping a spouse take care of a sick loved one

Etc...

# Teaching tips...

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- ❖ Make sure your client understands the underlying problem;
- ❖ Start from the known to the unknown, assess what the client already knows;
- ❖ Teach the simpler concepts first and then move to the more complex (e.g.: Hip replacement surgery);
- ❖ Involve the patient, be interactive, ask open ended questions - active not passive;
- ❖ Reinforce by asking client to show you how he's doing right after the teaching, and days after;
- ❖ Select 3 or 4 major concepts you wish to relay to client and focus on those. Repeat as needed;
- ❖ Give immediate feedback and correction (improves their learning);
- ❖ Use materials that are age, culture, language specific;
- ❖ Should be timely, efficient, caring, respectful and documented.

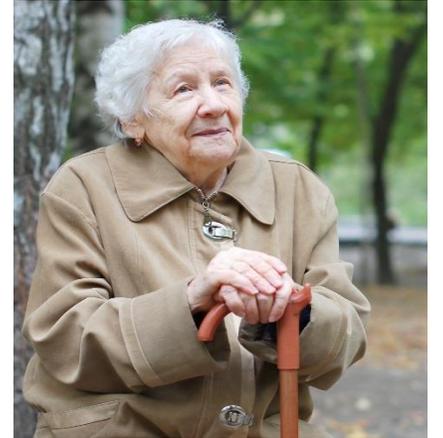
# Steps for Designing a Successful Patient Education Intervention (PEI)

- Selecting the PEI (Topic)
- Defining PEI goals and objectives
- Defining a target audience/knowledge user
- Conducting a needs assessment
- Deciding on time frame and support required
- Defining the PEI content
- Matching teaching methods to content and objectives
- Choosing teaching aids and learning resources
- Developing a PEI evaluation
- Determining a budget
- Deciding on marketing strategies
- Recruiting and preparing facilitators (if needed)
- Fine-tuning the PEI plan
- Finalizing the administrative details

# Step 1- Defining the Topic: What is the PEI?

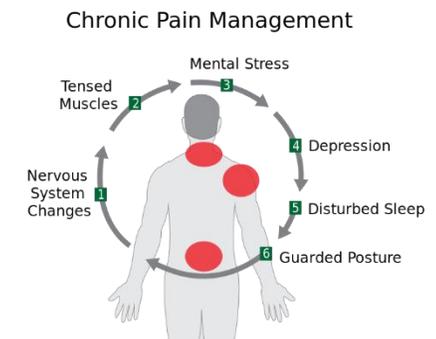
## First Find Out:

- Why is this topic important?
- Who would be interested in such a topic?
- What expertise is available to prepare and conduct this patient education intervention?



## Then:

Identify your Target Audience?



# Then: Defining Goals and Objectives for the PEI

➤ What is the overall goal of the PEI?

➤ What are the specific PEI objectives:

By the end of this PEI, participants will:



# Back to basics: Start with “SMART” Objectives

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## Review of PEI Objectives: Are they **SMART**?

- ➔ Specific
- ➔ Measurable
- ➔ Action-oriented
- ➔ Realistic
- ➔ Timely and Tap into knowledge, attitudes and skills

# The ABCD Method of Writing Objectives according to Bloom

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- A** – Is the **A**udience, always the Participant
- B** – Is the **B**ehavior or the Action Verb
- C** – Is the **C**ondition for the Objective
- D** – Is the **D**egree of Achievement or Acceptable Criteria (e.g.: recognized standards of practice)

See: Krathwohl, D. R. (2009). A Revision of Bloom's Taxonomy: an Overview. *Theory Into Practice*, 41: 4, 212-218. DOI: 10.1207/s15430421tip4104\_2URL: [http://dx.doi.org/10.1207/s15430421tip4104\\_2](http://dx.doi.org/10.1207/s15430421tip4104_2)

# B – ABCD Method

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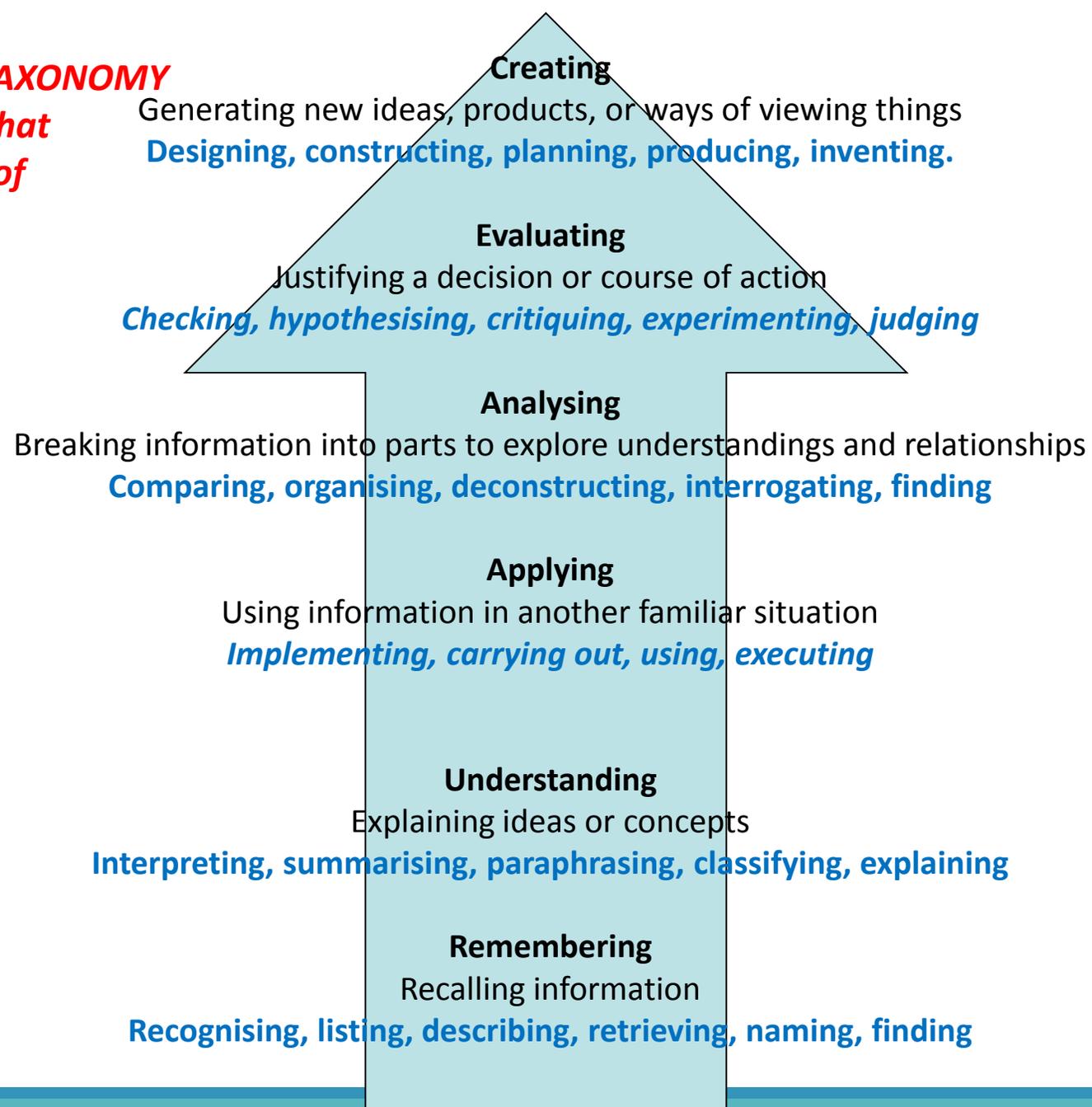
## Avoid

Comprehend  
Be familiar with  
Capable of  
Appreciation for  
Awareness of  
Has knowledge  
Understands

## Instead, Use

Describe  
Explain  
Demonstrate  
Show  
Apply  
Convince  
Discriminate

**USE BLOOM'S REVISED TAXONOMY**  
**to chose an action verb that**  
**corresponds to the level of**  
**learning desired.**



# C – ABCD Method

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**C** – Is the **C**ondition for the Objective: It describes the relevant factors associated with the desired performance

## **Examples:**

- After attending a lecture . . . .
- Following review of a demonstration. . . .
- After watching a video. . . .
- After completing the exercise program #2 . . . .

# D - ABCD Method

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**D** – Is the **D**egree of achievement or Acceptable Criteria: It tells how well the learner must perform ...

## Examples:

- Percent of correct responses ... 65% or >
- Within a given time period... (5 days)
- In compliance with the criteria presented by the instructor, (number of repetitions, fatigue level, pain tolerance, etc.

# Practice the ABCD Method

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- Write one personal objective for today, using Bloom's Taxonomy.
- Share with colleagues at your table and receive feedback.

# Step 2 – Selecting an Educational Strategy for the PEI

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- ❖ First, conduct a needs assessment
- ❖ Consider diverse assessment methods and data sources
- ❖ Then, assess some of the educational strategies that you have used in the past to create a PEI
  - ❖ Identify what worked well?
  - ❖ Identify which ones failed and why?

# Conducting a needs assessment

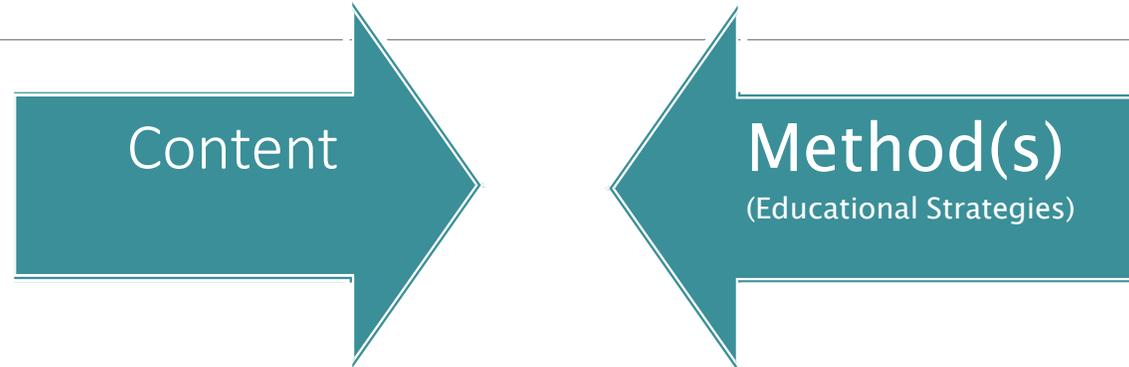
- ▶ Identify the needs\*
  - Individual vs. Organizational Needs
  - “Perceived” vs. “Unperceived” Needs of the Client
  
- ▶ Urgency and Priority
  - Will it change practice?
  - Can this wait?
    - ❖ Ex: teaching mothers recommended sleeping position to prevent sudden infant death syndrome

# Consider Diverse Assessment Methods & Data Sources

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- Consultation with colleagues and experts
  - Individual interviews
  - Focus groups with target groups of experts
- Consultation with patients
- Written Surveys and Questionnaires
- Chart Audit
- Literature Search
- Reflect on educational strategies you have used in the past:
  - What PEI worked well?
  - What PEI failed, and why?

# Selecting the Educational Strategies: Need to Match Methods to Content



Consider the focus of your PEI  
& the variety of content

Consider the pros and cons for  
using each method (strategy)

# Review of Educational Strategies

- Interactive Lectures
- Small Group Discussions
- Case Presentations/Discussions
- Panels and Debates
- Individual and/or Group Exercises
- Demonstrations
- Role Play and/or Simulations
- Practice—with Opportunities for Feedback
- Video Reviews
- Computer–Aided Instructions
- Directed–Readings
- Microteaching, etc.

## Review of Potential Teaching & Learning Educational Strategies and tools

Written material	Audio-visual material	Computer-Assisted Instruction
➤ Handouts	➤ PowerPoint slides	➤ On-line discussion groups
➤ Case vignettes	➤ Podcasts	➤ On-line case-based groups
➤ Study guides	➤ Flip charts	➤ Web-based teaching
➤ Worksheets	➤ Video-Films	➤ Models and simulations
➤ Pamphlets	➤ YouTube videos	➤ Trained actors
➤ Brochures, Etc.	➤ Posters or Charts	➤ Trained peer educators

## Example: Matching Methods to Content

Content	Methods	Pros & Cons
➤ Low Back Pain (LBP) Literature Review	➤ PowerPoint slides	➤ Need speaker with expertise
➤ Surgical procedure for LBP	➤ Patient Video, Vignette	➤ More Interactive

# Step 3 – Identifying Key Stakeholders

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- ❖ **Who are the key stakeholders to be involved with the PEI?** (e.g. clinicians, decision-makers, administrators, etc.)
  
- ❖ **Who will be the project leader?**

# Step 4 - Identify Resources to Develop and Implement the PEI

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- ❖ **What are the material resources required?** (e.g. equipment, laptops, projectors, video, iPad, iPhone, physical space)
- ❖ **What are the human resources required?** (e.g. content expert, graphic designer, IT support)
- ❖ **What are the organizational resources required?** (e.g. protected time)
- ❖ **What are the costs associated with implementing the intervention?** (e.g. adapting environment, training, equipment)
- ❖ **What type of skills/training is required for the instructors to implement the PEI?** (e.g. adult learning theory)
- ❖ **What type of skills/training is required for the knowledge users (i.e. patients) to use the PEI?** (e.g. computer literacy, language skills)

# Step 5 - Defining the content of the Patient Education Intervention (PEI)

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- ❖ **What is the content (main themes) of the PEI** (e.g. prevalence of recurrent low back pain, evidence for the benefits of physical activity for LBP, etc.)?
- ❖ **What sources of evidence will be used to inform the content for the PEI?** (e.g. guidelines, systematic reviews, etc.)?
- ❖ **Who will be involved with developing the content for the PEI?**

# Step 5 con't- Defining the content of the Patient Education Intervention (PEI)

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1. Complete an assessment of the patient's educational needs
2. Identify the basic priorities
3. Choose effective patient education materials
  - ❖ TIPS when selecting patient education materials
  - ❖ Identifying the appropriate teaching tools

# 1. Complete an Assessment of the patient's educational needs

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Find out *how* your patient likes to learn.

- Includes **readiness to learn, preferences, support required, and possible barriers to learning.**

*Organize* the information for easier comprehension.

Be realistic. Focus on what your *patient needs* to know, not on what is nice to know.

Pay attention to the *patient's concerns*. The person may have to overcome a fear before being open to teaching.

Respect the *patient's limits*. Offer the patient only the amount of information they can handle at one time.

Be aware that you may need to *adjust* your education plan based on the patient's health status and environmental factors.

## 2. Identify the Basic Priorities

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With any type of patient education, you will likely need to cover:

- What your patient needs to do and why
- When your patient can expect results (if applicable)
- Warning signs (if any) your patient should watch for
- What your patient should do if a problem occurs
- Who your patient should contact for questions or concerns

# 3. Choose Effective Patient Education Materials

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Once you have assessed your patient's needs, concerns, readiness to learn, preferences, support, and possible barriers to learning, you will need to:

- Make a plan with your patient and his or her support person
- Agree with the patient on realistic learning objectives
- Select resources that fit the patient
- The first step is to assess the patient's current knowledge about their condition.
  - ✓ Patients may need time to adjust to new information,
  - ✓ Patients may need time to master new skills,
  - ✓ Patients may need time to make short- or long-term lifestyle changes.

# ❖ TIPS when selecting patient education materials:

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- ❖ **Using a mixed media approach often works best.**
- ❖ Keep your assessment of the patient in mind.
- ❖ Consider factors such as **literacy** and **culture** as you develop a plan.
- ❖ Avoid fear tactics. Focus on the benefits of education.
- ❖ Be sure to review any materials you plan to use before sharing them with the patient.
- ❖ **Resources are not a substitute for one-on-one patient teaching.**
- ❖ May be hard to find materials on new treatments in certain languages or on sensitive topics.

# ❖ Identify Available Teaching Tools:

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- ❖ Brochures or other printed materials
- ❖ Podcasts
- ❖ YouTube videos
- ❖ Videos or DVDs
- ❖ PowerPoint presentations
- ❖ Posters or charts
- ❖ Models or props
- ❖ Group classes
- ❖ Trained peer educators
- ❖ Other...

# Step 6 – Planning the process for implementing the PEI

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- ❖ **How will knowledge users be recruited/elicited to receive the PEI?**
- ❖ **What type of knowledge users will benefit from the PEI?** (i.e. eligibility criteria)
- ❖ **Where will the PEI be administered?** (i.e. location)
- ❖ **When will the PEI be administered?** (i.e. stage of recovery, rehabilitation pathway)
- ❖ **Who will deliver the PEI?** (e.g. content expert, health professional, patient advocate/partner)
- ❖ **What is the frequency and duration of the PEI?**
- ❖ **What will be provided as support documents?** (e.g. instructional materials, reminders, written guidelines, pamphlets)

# Determining a budget

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## COSTS

- ✓ Locale, if group work or classes are considered
- ✓ Printing & Mailing
- ✓ Stationary & Workshop Materials
- ✓ Handouts (Production, Editing, etc.)
- ✓ Food (Breaks, Snacks, Water)
- ✓ Audiovisual Equipment
- ✓ Honoraria, Etc....

## Sources of Funding:

- ✓ Internal or External

# Designing Marketing Strategies

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- **Determine PEI Announcement**

- **Letter**
- **Flyer**
- **Brochure**

- **Design Announcement**

- **Make sure to include: date(s); time; place; cost; objectives (if appropriate); credits (if appropriate); special events...**

# Designing Marketing Strategies

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- ❖ Decide on Publicity and Recruitment Strategies for participants
  - Mass mailing; targeted mailing; personalized invitations
  - Identify pros and cons of each
- ❖ Decide on mode of communication with participants
- ❖ Other issues
  - Timing
  - Inclusion with other mailings
  - Use known sources, s/a: OPPQ, CPA, APTA, Hospital

# STEP 7: Evaluating impact of the PEI

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- ❖ How will you evaluate the effectiveness of the PEI (e.g. patient-related outcomes)?
- ❖ How will you evaluate the effectiveness of the process for implementing the PEI (e.g. adherence, participation rate)?
- ❖ What quantitative and qualitative measures will you plan to use?
- ❖ When will these outcomes be assessed (i.e. baseline, follow-up)?

**Refer to “A Framework for Designing Successful Patient Education Intervention or a Workshop: Assessment Grid”**

# STEP 8: Planning for a post-PEI team reflection/feedback session & Timeline

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- ❖ When will the reflection/feedback session take place?
- ❖ What strategies will be used to conduct the session? (e.g. in-person meetings, email)
- ❖ What topics should be discussed during the session? (e.g. challenges, lessons learned)

## **Timeline for PEI**

- ❖ What is the timeline for developing and implementing the PEI (each step above)?

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