SECOND EDITION

Health Professional as Educator

Principles of Teaching and Learning

Susan B. Bastable, EdD, MEd, RN
Nursing Education Consultant, Professor Emerita and Founding Chair
Department of Nursing, Purcell School of Professional Studies
Le Moyne College
Syracuse, New York

Margaret M. Braungart, PhD, MA, BS
Professor Emerita of Psychology, College of Health Professions
Former Professor of Bioethics, Center for Bioethics and Humanities, Upstate Medical University
Syracuse, New York

Pamela R. Gramet, PhD, PT
Associate Professor Emerita and Former Chair
Department of Physical Therapy Education, Upstate Medical University
Syracuse, New York

Karen Jacobs, EdD, OT, OTR, CPE, FAOTA
Clinical Professor and Program Director, Online Post-professional Doctorate Program
Occupational Therapy Department
Boston University
Boston, Massachusetts

Deborah L. Sopczyk, PhD, RN
Provost and Chief Academic Officer, Excelsior College
Albany, New York

JONES & BARTLETT LEARNING
Dedication

In loving memory to my father, Robert Wilson Bacorn, MD, JD, MPH (1919–2013), who had an insatiable thirst for knowledge. As my role model, he was the ultimate educator, and he taught me the importance and relevance of lifelong learning.

To students and professional colleagues from the various healthcare disciplines who have shared their teaching experiences as well as their knowledge, skills, ideas, and reflections on the principles of teaching and learning.

and

To our two beautiful grandchildren, Marion Learie Poitevent and Caroline Baños Poitevent, who are a source of great love, joy, excitement, and fulfillment in our lives.
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Foreword

Healthcare systems around the world continue to struggle with dramatic changes and cost increases. According to the World Economic Forum, healthcare costs are one of the top three drivers of the world’s economy. In developed nations, the social contracts established after World War II are no longer affordable. The current drive for austerity is calling into question how to bring healthcare costs in line with the economic realities of today without hurting the well-being and productivity of those countries. The social and political stability of developed nations is challenged as tension between the classes rises. In the developing world, the rise of the middle class is creating greater demand for social safety nets, particularly in health care and education. The governments of these nations are struggling to design healthcare delivery systems that meet the rising demand without repeating the same mistakes made by developed nations.

The ever-increasing global demand for health care has created provider shortages that have accelerated the creation of alternative healthcare delivery models. Nowhere has this shift been more apparent than in the United States. With the oft-troubled rollout of the Affordable Care Act, significant changes are occurring in the structure of healthcare delivery, as evidenced by the unlikely vertical integration of providing and financing health care that is grabbing news headlines on a regular basis. These tectonic shifts are radically redefining how health care will be delivered and by whom that care will be provided now and in the future.

Health professionals from many disciplines will have an expanding and central role in our new delivery models here in the United States and around the world. These models will require a team-based system focused on the patient (patient-centered medical homes), in which health professionals will be key partners in practicing at their highest level of education, licensure, and certification. As chronic care management and wellness are further refined by personalized medicine, the role of health professionals as educators and coordinators of care will become a central tenet of increased engagement by patients for the achievement of their “best state of health.”

In this second edition of *Health Professional as Educator*, Susan Bastable carries on the tradition of the previous edition in bringing forward the very best thinking about the knowledge, attitudes, and skills necessary for expanding the practice of health professionals in a quickly changing healthcare environment. The role of the various disciplines in understanding the readiness of patients and families to learn and change behavior is clearly outlined in theoretical and, most important, practical approaches to educating consumers. In addition, the principles of teaching and learning presented in the chapters of this book also are applicable to educating professional staff and students who constitute the workforce of today and tomorrow.

This text provides a thorough review of learning theories, teaching methods, and instructional tools; it also gives the reader a comprehensive understanding of different populations, with their attendant challenges
and disparities associated with characteristics such as gender, culture, socioeconomics, and disabilities that require specific skills to educate learners with diverse backgrounds. The author also reviews the emerging technology environment, which brings greater opportunity to develop and execute team-based and personalized approaches to helping patients and their families best learn and change behavior appropriately.

As we enter this exciting period of change in healthcare systems around the world, the role of health professionals is critically important in teaching patients the important skills needed to reach their optimal state of health as well as in preparing staff and students for competent practice. This text provides an exciting and actionable roadmap for effectively preparing health professionals for their role as educators.

Mark T. Bertolini
Chairman, Chief Executive Officer, & President
Aetna, Inc.
The U.S. Bureau of Labor Statistics (2018) has identified more than two dozen professional healthcare occupations. All of these health professionals are expected to assume the role of teaching others in their daily practice, whether their audience consists of patients and families, fellow colleagues, or students as prospective members of a given profession. However, very few members of the health disciplines have ever been educated on the principles of teaching and learning to successfully and securely carry out their role as educator. This text was written as a significant resource to fill this void.

Teaching patients, well or ill, to maintain optimal health and to prevent disease and disability assists them in becoming as independent as possible in self-care activities. Also, properly educating consumers has the potential to help them achieve positive health outcomes and to accomplish the economic goal of reducing the high costs of healthcare services. Teaching staff and students to competently, confidently, effectively, and efficiently practice in an interdisciplinary manner in any setting with individuals and groups from diverse backgrounds will ensure the delivery of high-quality care.

This text has been written for healthcare staff for whom the role of teacher is a significant practice component of their everyday activities, for undergraduate and graduate students learning the knowledge and skills to become the health professionals of tomorrow, and for faculty in academic programs at all levels of education who are preparing students to be future practitioners in their chosen discipline. This text is comprehensive in scope, taking into consideration the basic foundations of the education process, the needs and characteristics of learners, the appropriate techniques and strategies for instruction, and the methods to evaluate the achievement of educational objectives and goals. In essence, this text provides answers to questions that pertain to the teaching process—who, what, where, when, how, and why.

This latest edition fully acknowledges the important role of the health providers as well as the changing role of the consumer of health care with respect to accountability and responsibility for teaching and learning. No longer should a health professional as educator be the giver of information only; instead, the health professional must function as the guide on the side and as the facilitator in partnership with the consumer, who must assume a much greater role in learning. The philosophy of the interdependence between the teacher and learner in the education process is emphasized throughout the chapters.

My sincerest hope is that this text serves as an invaluable resource to its readers who are striving to become adept at delivering patient, staff, and/or student education based on the principles of how health professionals can best teach and how consumers can best learn. As health providers, we must never forget our solemn duty to make a positive difference in the lives of those we serve, and teaching is a major factor that influences the health, development, and well-being of our audience of learners.

Susan B. Bastable, EdD, RN
Nursing Education Consultant
Professor Emerita and Founding Chair
Department of Nursing
Purcell School of Professional Studies
Le Moyne College
What’s New

All chapters have been extensively revised to include new content.

- **Chapter 1** includes the most current information on the transformation of health professional education, patient engagement for patient-centered care, and the importance of interprofessional education and collaboration.

- **Chapter 3** has expanded on neuropsychology and the theory and application of motor learning and also offers a clear explanation of the applicability of learning theories to practice.

- **Chapter 6** addresses motivational interviewing as a client-centered strategy for behavior change, includes the latest social ecological model of learning, and stresses how theories of compliance and motivation not only explain individual behavior but also can be applied to change behaviors.

- New measurement tools to assess health literacy have been added to **Chapter 7**.

- **Chapter 8** focuses on the latest discoveries in neuroscience on gender differences in learning, stresses the importance of sexual orientation and gender identity, which includes the unique educational needs of the LGBTQ community, emphasizes the impact of socioeconomics on learning, and addresses the disparity between the number of underrepresented minorities in the health professions in comparison with the general population in meeting the cultural needs of learners.

- **Chapter 11** includes new approaches for verbal teaching, such as the teach-back strategy, Ask Me 3, and the EDUCATE models.

- **Chapter 13** explains the Fourth Industrial Revolution in the Information Age with rapid advances in technology and mobile learning devices. And **Chapter 14** includes a new model of evaluation.

In addition to new content, the most updated references have been added to every chapter, but classic works relevant to the field of education have been retained. Current statistics reflect changes in population trends, new tables and figures have been added to visually summarize the information presented, and the most recent websites are provided throughout the text as sources of further information on particular topics. Also, by popular demand, new case study scenarios are included at the end of each chapter for application of teaching and learning principles to healthcare practice.

▶ Instructor and Student Resources

Qualified Instructors will receive a full suite of Instructor Resources, including the following:

For the Instructor:

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A Test Bank with chapter-by-chapter questions
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Answers to the Case Studies appearing in the book
Additional Case Studies available as writeable PDFs along with answers

For the Student:

Flashcards highlighting key terms to help reinforce comprehension of course material
Each new book comes complete with an eBook
Acknowledgments

A special appreciation is extended to the original authors of the 14 chapters whose valuable work provided the foundation for adding new material to this most recent second edition. I am grateful for the loyalty of four coauthors, Pamela Gramet, Karen Jacobs, Peg Braungart, and Debbie Sopcyzk, respectively representing the specialty occupations of physical therapy, occupational therapy and ergonomics, psychology, and clinical simulation and competency-based education in the health sciences, who reviewed and edited the majority of the chapters. Also, I am indebted to a group of three new colleagues, Mari Arnaud, Brooke Binion, and John Rabbia, representing the interdisciplinary fields of occupational therapy, physician assistant, and physical therapy, respectively, who joined the team to contribute their professional knowledge, practice expertise, and fresh perspectives in revising the content of the chapters they so thoroughly reviewed. Every one of them dedicated his or her efforts to significantly updating the information and references contained in every chapter for the benefit of the intended audience of diverse readers.

Also, I extend my sincerest thanks to the entire publishing staff of the health professions division of Jones & Bartlett Learning for making this newest edition possible. In particular, I would like to acknowledge Cathy Esperti, Director of Product Management; Robert Furrer, Project Specialist; Amanda Martin, Vice President, Product Management; and Jennifer Schierzay, Senior Marketing Manager. They have provided expert technical advice and guidance, organizational skills, and constant support, understanding, and encouragement throughout the process of launching this publication. I would also like to recognize Elaine Kosta, Senior Permissions Project Manager from Lumina Datamatics and the incredible copyediting skills of Julie McLaughlin. All of them together are a very talented team of professionals!

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Contributors

L. Mari Arnaud, MSEd, OTR/L
Occupational Therapist (doctoral candidate, Columbia University)
Public School 197
New York, New York

Susan B. Bastable, EdD, RN
Professor Emerita and Founding Chair
Department of Nursing
Purcell School of Professional Studies
Le Moyne College
Syracuse, New York

Brooke N. Binion, MS, PA-C
Physician Assistant (certified)
Internal Medicine Private Practice Office
Syracuse, New York

Margaret M. Braungart, PhD
Professor Emerita of Psychology, College of Health Professions
Former Professor of Bioethics, Center for Bioethics and Humanities
Upstate Medical University
Syracuse, New York

Richard G. Braungart, PhD
Professor Emeritus of Sociology and International Relations
Maxwell School of Citizenship and Public Affairs
Syracuse University
Syracuse, New York

Kathleen Fitzgerald, MS, RN, CDE
Patient Educator (retired)
St. Joseph’s Hospital Health Center
Syracuse, New York

Pamela R. Gramet, PhD, PT
Associate Professor Emerita and Former Chair
Department of Physical Therapy Education
Upstate Medical University
Syracuse, New York

Diane Hainsworth, MS, RN-C, ANP
Clinical Case Manager—Oncology (retired)
University Hospital
Upstate Medical University
Syracuse, New York

Karen Jacobs, EdD, OT, OTR, CPE, FAOTA
Clinical Professor & Program Director, Online Post-professional Doctorate Program
Occupational Therapy Department
Boston University
Boston, Massachusetts

Sharon Kitchie, PhD, RN
Adjunct Instructor
Keuka College
Keuka Park, New York
Director of Patient Education and Interpreter Services (retired)
University Hospital
Upstate Medical University
Syracuse, New York

Gina M. Myers, PhD, RN
Adjunct Faculty
Department of Nursing
Purcell School of Professional Studies
Le Moyne College
Syracuse, New York
Associate/Research Consultant
St. Joseph’s Hospital Health Center
Syracuse, New York
Priscilla Sandford Worral, PhD, RN, FNAP
Adjunct Professor
Lienhard School of Nursing
Department of Graduate Studies
Pace University
New York, New York
Nurse Research Scientist (retired)
University Hospital
Upstate Medical University
Syracuse, New York

M. Janice Nelson, EdD, RN
Professor and Dean Emerita
College of Nursing
Upstate Medical University
Syracuse, New York

John Rabbia, PT, DPT, MBA, MS
Chief Quality Officer
New York Health & Hospitals, At Home
New York, New York

Deborah L. Sopczyk, PhD, RN
Provost and Chief Academic Officer
Excelsior College
Albany, New York
About the Authors

Susan B. Bastable, EdD, MEd, RN, is professor emerita and founding chair of the Department of Nursing at Le Moyne College in Syracuse, New York. Dr. Bastable earned her master’s degree in community health nursing and her doctoral degree in curriculum and instruction in nursing at Teachers College, Columbia University, in 1976 and 1979, respectively. She received her diploma from Hahnemann Hospital School of Nursing (now known as Drexel University of the Health Sciences) in Philadelphia in 1969 and her bachelor’s degree in nursing from Syracuse University in 1972.

She began her academic career in 1979 as assistant professor at Hunter College, Bellevue School of Nursing in New York City, where she remained on the faculty for two years. From 1987 to 1989, she was assistant professor in the College of Nursing at the University of Rhode Island. In 1990, she joined the faculty of the College of Nursing at Upstate Medical University in Syracuse, where she was associate professor and chair of the undergraduate program for 14 years. In 2004, she assumed her leadership position at Le Moyne and successfully established an RN–BS completion program, created an innovative four-year undergraduate dual degree partnership in nursing with the associate degree program at St. Joseph’s College of Nursing in Syracuse, and instituted an MS program and two post-MS certificate programs with tracks in nursing education and nursing administration. Before her retirement, she was instrumental in receiving state approval for the establishment of the family nurse practitioner program.

Dr. Bastable has taught undergraduate courses in nursing research, community health, and the role of the nurse as educator and courses at the master’s and post-master’s level in the academic faculty role, curriculum and program development, and educational assessment and evaluation. For 29 years, she served as a consultant and external faculty member for Excelsior College (formerly known as Regents College of the University of the State of New York). Her clinical practice includes experience in community health, oncology, rehabilitation and neurology, occupational health, and medical/surgical nursing.

Dr. Bastable is the recipient of the 1996 President’s Award for Excellence in Teaching at Upstate Medical University; the 1999 Chancellor’s Award for Excellence in Teaching from the State University of New York; the 2002 Award for Nursing Excellence as well as the 2008 Lifetime Achievement Award from District #4 of the New York State Nurses Association; and the 2001 Distinguished Achievement Award in Nursing Education and induction into the Hall of Fame from the Nursing Education Alumni Association of Teachers College, Columbia University.

She has been a member of numerous nursing education advisory boards, served as a consultant to many nursing programs on curriculum planning, program development, and state and regional program accreditation, and is the author of journal articles and two other textbooks on the principles of teaching and learning, Nurse as Educator and the Essentials of Patient Education.
Coauthors

Margaret M. Braungart, PhD, MA, BS, is professor emerita of psychology and former professor of bioethics and humanities at Upstate Medical University in Syracuse, New York. She earned her BS degree in elementary education and her MA in human development, with a minor in measurement and statistics in the College of Education at the University of Maryland. Her PhD is in psychology from Syracuse University.

For many years, she taught courses in educational psychology, developmental psychology, gerontology, and health psychology to students in the College of Nursing and the College of Health Professions at Upstate Medical University, where she served as the elected chair of the Department of Health Sciences and Human Studies for seven years. Her faculty appointment then was moved to the newly formed Center for Bioethics and Humanities in the College of Medicine at Upstate, where she taught courses in healthcare ethics to nursing and health professional students and led discussion groups on medical ethics for first- and second-year medical students. She also was the director of the Consortium for Culture and Medicine, a joint educational arrangement among Upstate Medical University, Syracuse University, and Le Moyne College in Syracuse, New York.

In addition to the application of learning theories to health care and medicine, Dr. Braungart’s research is in the area of life course and generations, giving special focus to the stage of youth, generational relations, and young people’s movements for social change. Taking an interdisciplinary, historical, and global perspective, she and her husband, Richard, coauthored numerous articles on these topics that have been translated into many languages. They actively participated in numerous international conferences over the past 30 years, consulted with the United Nations, and coedited an annual research publication for five years.

Pamela R. Gramet, PhD, PT, is associate professor emerita and former chair of the Department of Physical Therapy Education at Upstate Medical University in Syracuse, New York. During her tenure at Upstate, she has also served in a variety of administrative positions, including department vice chair, department chair, and academic coordinator of clinical education.

Dr. Gramet earned her doctoral degree in child and family studies from Syracuse University, her master of science degree in education from Stony Brook University, and her bachelor of science degree in physical therapy, magna cum laude, from Ithaca College. She holds advanced certifications in neurodevelopmental treatment, teaching improvement, clinical instruction, and board leadership.

Dr. Gramet has more than 30 years of teaching experience, and her areas of expertise include education theory and practice, clinical education, neurologic physical therapy, professionalism, and complementary and alternative medicine. Dr. Gramet was a member of the American Physical Therapy Association task force that developed the first national Clinical Performance Instruments (CPIs) for assessment of physical therapist and physical therapist assistant student clinical performance. She was also a founding member of the New York Physical Therapy Clinical Education Consortium. Over the years, Dr. Gramet has developed and taught numerous workshops on clinical teaching skills for clinical instructors. She was instrumental in developing the curriculums for both the master’s degree program and the professional and postprofessional doctoral physical therapy programs at Upstate Medical University. She has served as a curriculum consultant for several graduate physical therapy programs.

Dr. Gramet is a recipient of the President’s Award for Excellence in Teaching and received Certificates of Appreciation from the New York Physical Therapy Association and the
American Physical Therapy Association. She is also a recipient of the Outstanding Academic Coordinator of Clinical Education Award and a Certificate of Excellence from the Clinical Education Consortium. Dr. Gramet’s research interests include education, clinical teaching, and the professional and psychosocial aspects of physical therapy.

Karen Jacobs, EdD, OT, OTR, CPE, FAOTA, is a past president and vice president of the American Occupational Therapy Association. She is a 2005 recipient of a Fulbright Scholarship to the University of Akureyri in Akureyri, Iceland; is the 2009 recipient of the Award of Merit from the Canadian Association of Occupational Therapists; received the Award of Merit from the American Occupational Therapy Association in 2003; and received the 2011 Eleanor Clarke Slagle Lectureship Award. She is a Fellow of the Human Factors and Ergonomics Society (HFES).

Dr. Jacobs is a clinical professor of occupational therapy and the program director of the online postprofessional doctorate in occupational therapy program at Boston University (BU). She has expertise in the development and instruction of online and on-campus graduate courses. She has worked at BU since 1983.

Dr. Jacobs earned a doctoral degree at the University of Massachusetts, a master of science at BU, and a bachelor of arts at Washington University in St. Louis, Missouri. Dr. Jacobs’s research and scholarly pursuits examine the interface between the environment and human capabilities. In particular, she is investigating the individual factors and environmental demands associated with the use of telehealth technologies to deliver occupational therapy services and the increased risk of functional limitations among populations of university and middle-school-aged students, particularly in the wearing of backpacks and use of notebook computing and the iPad.

She is a co-PI on a 5-year U.S. Department of Education grant from the National Institute for Disability, Independent Living, Rehabilitation, and Research in conjunction with Kent State University, JBS International, Inc., West Virginia University, and Boston University entitled Project Career: Development of an Interprofessional Demonstration to Support the Transition of Students with Traumatic Brain Injuries from Post-secondary Education to Employment. Her research has been supported by grants from the Office Ergonomics Research Committee and the Harvard-NIOSH Education and Research Center and gifts from Hewlett Packard, Microsoft, and Target.

Dr. Jacobs has authored/coauthored more than 60 peer-reviewed journal articles and edited/coedited 19 book chapters and 18 books, including Occupational Therapy Essentials for Clinical Competency (two editions), The Occupational Therapy Manager (5th–7th editions), Quick Reference Dictionary for Occupational Therapy (6th edition), Ergonomics for Therapists (two editions), and Work Practice: International Perspectives. She is the coauthor of 14 children’s books on topics such as dementia, depression, autism, and other disabilities.

In addition to her occupational therapist role, Dr. Jacobs also is a certified professional ergonomist and the founding editor-in-chief of the international interdisciplinary journal WORK: A Journal of Prevention, Assessment and Rehabilitation (IOS Press, The Netherlands), which celebrates its 29th anniversary in 2019. Dr. Jacobs is the chair of Outreach Division of HFES. Dr. Jacobs has a small business that provides consulting services in ergonomics and entrepreneurship.

Deborah L. Sopczyk, PhD, RN, is provost and chief academic officer at Excelsior College in Albany, New York. Before her appointment to the provost position in 2016, she served in a variety of leadership positions at the college, including dean of the School of Health
Sciences and director of graduate programs in nursing and health care.

Dr. Sopczyk earned a baccalaureate degree in nursing from the State University of New York at Plattsburgh, a master of science degree in nursing from the State University of New York at Buffalo, and a doctoral degree in social welfare from the State University of New York at Albany. Dr. Sopczyk has more than 40 years of experience in higher education and has experience teaching at the associate's, baccalaureate, and master's degree levels. With more than 30 years of experience working with adult learners, Dr. Sopczyk has expertise in adult and distance education, clinical simulation, and competency-based education. In addition to her work at Excelsior College, she has taught at D’Youville and Trocaire Colleges, both in Buffalo, New York. Her clinical practice areas include child health, pediatric oncology, and family violence.