

SIXTH EDITION

# Nurse *as* Educator

*Principles of Teaching and  
Learning for Nursing Practice*

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LEARNING

# The Pedagogy

*Nurse as Educator: Principles of Teaching and Learning for Nursing Practice, Sixth Edition* drives comprehension of various strategies that meet the learning needs of students, while also generating enthusiasm about the topic.

This interactive approach addresses different learning styles, making this the ideal text to ensure mastery of key concepts. The pedagogical aids that appear in most chapters include the following:

**Chapter Highlights** Found at the beginning of each chapter, these highlights provide a quick-look overview of the content presented in each chapter.

**Key Terms** A list of terms at the beginning of each chapter will expand the student's professional vocabulary.

## CHAPTER HIGHLIGHTS

- Historical Foundations for Patient Education in Health Care
- The Evolution of the Teaching Role of Nurses
- Social, Economic, and Political Trends Affecting Health Care
- Purposes, Goals, and Benefits of Patient and Nursing Staff/Student Education
- The Education Process Defined
- The Contemporary Role of the Nurse as Educator
  - Interprofessional Education and Practice
  - Patient-Centered Care
  - Quality and Safety Education in Nursing
  - The Institute of Medicine Report: The Future of Nursing
- Barriers to Teaching and Obstacles to Learning
  - Factors Affecting the Ability to Teach
  - Factors Affecting the Ability to Learn
- Questions to Be Asked About Teaching and Learning
- State of the Evidence

## KEY TERMS

barriers to teaching education process	interprofessional practice learning obstacles to learning	patient-centered care (PCC)
interprofessional education (IPE)	patient education	staff education teaching and instruction

## OBJECTIVES

After completing this chapter, the reader will be able to:

1. Discuss the evolution of patient education in health care and the teaching role of nurses.
2. Recognize trends affecting the healthcare system in general and nursing practice in particular.
3. Identify the purposes, goals, and benefits of patient and nursing staff/student education.
4. Compare the education process to the nursing process.
5. Define the terms education process, teaching, and learning.
6. Identify why patient and staff/student education is an important duty for nurses.
7. Analyze the significance of interprofessional education (IPE) and interprofessional practice to the delivery of patient care.
8. Explain why the patient-centered care (PCC) movement is an important trend in health care.
9. Discuss the barriers to teaching and the obstacles to learning.
10. Formulate questions that nurses in the role of educator should ask about the teaching-learning process.

Education in health care today—both patient education and nursing staff/student education—is a topic of utmost interest to nurses in every setting in which they practice. Teaching is an important aspect of the nurse's professional role (Andersson et al., 2015; McKenna et al., 2018; Sideres & Bate, 2013), whether it involves educating patients and their family members, colleagues, or nursing students. The current trends in health care are making it essential that patients be prepared to assume responsibility for self-care management and that nurses in the workplace be accountable for the delivery of safe, high-quality care (Dixons-Groff et al., 2019; Lockhart, 2016; Shi & Singh, 2015; U.S. Department of Health and Human Services [USDHHS], 2015). The focus of modern health care is on outcomes that demonstrate the extent to which patients and their significant others have learned essential knowledge and skills for independent care or to which staff nurses and nursing students have acquired the up-to-date knowledge and skills needed to competently and confidently render care to the consumer in a variety of settings (Committee on Quality of Health Care in America & Institute of Medicine [IOM], 2001; Doyle et al., 2013; IOM, 2001; Salmon & Echevarria, 2017).

Patient education is an issue in nursing practice and will continue to be a significant focus in the healthcare environment (Fringberg et al., 2012). Because so many changes are occurring in the healthcare system, nurses are increasingly finding themselves in challenging, constantly changing, and highly complex positions and, in some cases, do not have the appropriate skills to effectively teach patients (Gillespie & McFerridge, 2006; McKenna et al., 2018; Pollock, 2017; Vennum, 2017). Nurses in the role of educators must understand the forces, both historical and present day, that have influenced and continue to influence their responsibilities in practice.

One purpose of this chapter is to shed light on the historical evolution of patient education in health care and the nurse's role as teacher. Another purpose is to offer a perspective on the current trends in health care that make the teaching of clients a highly visible and required function of nursing care delivery. Also, this chapter addresses the continuing education efforts necessary to ensure ongoing practice competencies of nursing personnel.

In addition, this chapter clarifies the broad purposes, goals, and benefits of the teaching-learning process; focuses on the philosophy of the nurse-client partnership in teaching and learning; compares the education process to

**Objectives** These learning objectives provide instructors and students with a snapshot of the key information they will encounter in each chapter. They serve as a checklist to help guide and focus study.

**Review Questions** Review key concepts from your reading with these exercises at the end of each chapter.

#### Review Questions

1. Which key factors influenced the growth of patient education during its formative years?
2. How far back in history has teaching been a part of the nurse's role?
3. Which nursing organization was the first to recognize health teaching as an important function within the scope of nursing practice?
4. How did the concept of patient education change in the 1960s and 1970s?
5. Which legal mandate universally includes teaching as a responsibility of nurses?
6. How have the ANA, NEN, CN, AHA, IJC, and Pew Commission influenced the role and responsibilities of the nurse as educator?
7. What is the current focus and orientation of patient education?
8. Which social, economic, and political trends today make it imperative that patients be adequately educated?
9. What are the similarities and differences between the education process and the nursing process?
10. What are three major barriers to teaching and three major obstacles to learning?
11. Which factor serves as both a barrier to teaching and an obstacle to learning?
12. What is the present status of research- and non-research-based evidence pertaining to education?

#### CASE STUDY

Katelyn is a new RN working the night shift on a medical/surgical unit. Mr. Williams, a patient in a room next to Katelyn's assigned area, has been setting off the bed alarm all night, and other patients are starting to complain about the disturbance. Katelyn goes in to assist the nurse, Arlene, who is in the room trying to control the situation. Mr. Williams is out of bed, clearly confused and disoriented, claiming that he is being held hostage and needs to get out of there. Katelyn helps Arlene get the patient back into bed safely, but it is clear he is not going to stay there for long. Arlene is clearly flustered and says, "I've had enough!" before hurrying out of the room and returning with four-point restraints. She turns to Katelyn and states, "The doctor won't give me any more medication to put this patient down, so I am putting these on him just to have time to get some charting done. I'll take them off in the morning before anyone sees." Katelyn knows that Arlene does not have an order for restraints and that they can cause harm to the patient, especially when not used appropriately.

1. What plausible actions should Katelyn take at this point?
2. Which legal and ethical reasons could Katelyn rely on to justify the actions she takes?
3. Which of Katelyn's actions seem the most justified from a moral and ethical standpoint?

**Case Studies** Located at the end of each chapter, case studies encourage active learning and promote critical thinking skills in learners. Students can read about real-life scenarios and then analyze the situation the case study presents by answering three or four questions relevant to the scenario.



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In honor of Dr. M. Janice Nelson, a dear professional colleague, mentor, long-time friend, and fellow student at Columbia University, who was the one to inspire me to write the first edition of this textbook. As my dean for 14 years, she granted me a semester off from my educator responsibilities in 1995 to make this book a reality. The rest is history. Little did I realize that her belief in me as a writer with knowledge to share about many facets of teaching and learning would start me on a 25-year publication journey with this sixth edition release along with two other books, each now with two editions. Janice is the original author of Chapter 2 and served as a contributor to my first four editions of this text. She opened many doors for me and her advice, guidance, support, and friendship throughout my professional career will be forever cherished.

Also, to nursing students and professional colleagues who over the years have shared their teaching experiences as well as their knowledge, skills, ideas, and reflections on the principles of teaching and learning.

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# Foreword

Health care in the United States is being delivered during a time of great uncertainty, transformation, and consumerism. Patients and communities are demanding greater control and input into their healthcare decisions and how care should be provided. The positive impact of healthcare reform is improving access to care, but the need continues for a more integrated and equitable health system, driven by highly competent and compassionate caregivers who fully understand and embrace the needs of their patients and who collaborate with all members of the healthcare team. In addition, the future will require a relentless focus on quality, care coordination, innovation, and efficiency in an environment of ever scarcer resources and disruptive forces.

*Nurse as Educator* recognizes these changes and builds on the author's five successful editions of the book, which have given nurses invaluable strategies for partnering with patients and serving the community. Nurses are the most trusted members of the healthcare team and *Nurse as Educator* gives them all of the practical tools they need to provide effective and efficient patient/family education as well as to educate nursing colleagues and nursing students.

This book could not be more timely as nurses strive to enhance their patients' ability to manage their own care, educate family members to support the overwhelming complexity of clinical protocols, and understand the needs of learners who have highly variable levels of health literacy and diverse social and cultural attributes. Nurses also play a vital role in

teaching other members of the healthcare team and in educating the next generation of nurses.

The author and her chapter contributors have anticipated and explored all the dimensions of teaching and learning in this very important text. Although it includes the fundamentals of learning theories, teaching methods, and instructional materials, *Nurse as Educator* also focuses on critical issues such as readiness to learn, learning styles, motivation and adherence, teaching people with disabilities, and technology in education all based on the latest research and theoretical underpinnings.

Nurses will greatly benefit from the content and format of this comprehensive and well-organized book that prepares them to fully embrace the new challenges of an ever-changing healthcare environment. The knowledge, skills, and commitment of nurses in educating patients and families to manage their care independently and in teaching colleagues and students to practice competently for the delivery of high-quality, compassionate, and efficient care will drive the necessary improvements in the health system and will demonstrate their leadership in transforming health care.

Nancy Schlichting  
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# Preface

This text has been written for undergraduate and graduate nursing students learning the knowledge and skills to become the professional nurses of tomorrow; for faculty teaching in academic nursing programs to prepare future nurses at all levels of education; and for staff nurses serving as patient educators, in-service educators, clinical preceptors, and mentors for whom the role of teacher is a significant practice component of their daily activities. No matter their role or status, it is a legal, ethical, and moral responsibility of registered nurses practicing in any setting to teach others, whether their audience consists of patients and families, fellow colleagues, prospective members of the profession, or the general public in the community. Mandates included in the nurse practice acts of all states and territories, expectations by the national and regional standards of nursing organizations and accrediting bodies, and the policies and procedures adopted by local healthcare institutions and agencies require that nurses function in the role of educators.

Teaching patients and their significant others has been the obligation of nurses since the profession began during the era of Florence Nightingale. Since then, the scope of nursing practice has significantly evolved and has grown to include nurses teaching members of their own discipline to render safe, high-quality care. Nevertheless, most nurses acknowledge that they have not had the formal preparation to successfully and securely carry out their role as educator. Every nurse must have the knowledge and skills to competently and confidently teach learners who have a variety of needs and who are found in many

different settings. Also, the educator must be able to do so with efficiency and effectiveness based on a solid mastery of the principles of teaching and learning.

However, nurses are not born with the innate ability to teach or to understand the ways in which people learn. The art and science of teaching takes special expertise about how to best communicate information and about how that information is most successfully acquired by the learner. Teaching patients, staff, and students is critical to the provision of high-quality nursing care, and nurses must capture this domain as an important and unique aspect of their holistic approach to professional practice.

This text is a timely resource that provides approaches essential to addressing many of today's pressing issues in the healthcare environment. The growing demand for nurses to deliver the highest quality of care possible, the critical shortage of faculty in nursing schools nationwide, the significant problem of consumer health literacy, the ongoing movement to guarantee access to care for all, the technological advances increasing the complexity of health care, the changing demographics of the population, the increasing emphasis on health promotion and disease prevention, and the rise in chronic illnesses are just a few of the many important trends. Not only is it recognized that patient education by nurses can significantly improve client health outcomes, but consumers today must be taught how to independently manage their own care. In turn, nurses must be adequately prepared as lifelong learners to participate in the constantly transformative and challenging system of health care.

The content of this text reflects a balance between theories and models associated with education and the real-world application of the principles of teaching and learning pertinent to patients, staff, and students acquiring knowledge, attitudes, and skills essential to their roles. This latest edition fully acknowledges the important role of the professional nurse 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 the nurse be the giver of information only but must function as the guide on the side and as the facilitator in partnership with the consumer, who must assume a much more active part in learning. The philosophy of the interdependence between the teacher and learner in the education process is emphasized throughout the chapters.

All chapters have been revised to include new content, such as the addition of many more innovative teaching methods for collaborative learning; emphasis on patient-centered care and patient engagement; the focus on quality and safety education in nursing; information on nursing education transformation and the importance of interprofessional education; the use of electronic health records and patient portals; advances in telehealth and patient monitoring from a distance; and technology for remote teaching and learning. Also, the most updated, research-based 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, and new tables and figures have been added to visually summarize the information presented. In addition, the most recent websites are provided throughout the text as sources of further information on particular topics. And, by popular demand, new case study scenarios appear at the end of each chapter for application of teaching and learning principles to nursing practice.

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 outcomes. In essence, this text provides answers to questions that pertain to the teaching and learning process—who, what, where, when, how, and why.

Thus, the focus of this text is on the contemporary role of the nurse as educator. Teaching patients, well or ill, to maintain optimal health and to prevent disease and disability assists them to become as independent as possible in self-care activities. Properly educating consumers has the potential to accomplish the economic goal of reducing the high costs of healthcare services. Teaching staff and students to practice competently, confidently, effectively, and efficiently in an interdisciplinary manner in any setting with individuals and groups from diverse backgrounds will ensure the delivery of high-quality care.

I sincerely hope 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 the nurse can best teach and how consumers can best learn. As nurses, 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.

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Thanks, too, to Nancy Schlichting who once again has written the foreword in this text. She has been a national leader in health care for decades and is recognized for her keen mind, person-centered leadership, incredible compassion toward others, advocacy for the health of the public, and innovative spirit in transforming healthcare delivery. She has been a very close friend and colleague for many years.

And last, but certainly not least, my husband, Jeffrey, deserves the deepest gratitude from me for his steadfast support during the countless hours and endless months that I devoted to research, writing, and editing, which was key to making this *Sixth Edition* a reality.



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**Susan Bacorn Bastable** earned her MEd in community health nursing and her EdD in curriculum and instruction in nursing at Teachers College, Columbia University, in 1976 and 1979, respectively. She received her diploma

in nursing 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.

Dr. Bastable was professor and founding chair of the Department of Nursing at Le Moyne College in Syracuse, New York for 11 years. She retired in May 2015 and was honored with the title of professor emerita. 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 2 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 the State University of New York (SUNY) 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 College and successfully established an RN-BS completion

program; an innovative 4-year undergraduate dual-degree partnership in nursing (DDPN) supported by two Robert Wood Johnson Foundation grants in conjunction with the associate's degree program at St. Joseph's College of Nursing in Syracuse; a BS-MS bridge program; a postbaccalaureate RN-MS certificate program; a master of science program and three post-MS certificate programs with tracks in nursing education, nursing administration, and informatics; and most recently a family nurse practitioner (FNP) program as well as a post-MS FNP option.

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 postmaster's level in the academic faculty role, curriculum and program development, and educational assessment and evaluation. For 31 years, she served as 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 experiences in community health, oncology, rehabilitation and neurology, occupational health, and medical/surgical nursing.

Dr. Bastable received the President's Award for Excellence in Teaching at Upstate Medical University and the SUNY Chancellor's Award for Excellence in Teaching. Also, she was recognized for the Women in Leadership Award from the Greater Syracuse Chamber of Commerce and was honored with the Distinguished Achievement Award in Nursing Education from Teacher's College, Columbia University. In addition to authoring six editions of *Nurse as Educator*, she is

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the author of two editions of *Essentials of Patient Education* and is the main editor of two editions of the textbook *Health Professional as Educator*.

In retirement, she has been serving in the role of a nursing education consultant for national and regional program accreditations and assisting colleges of nursing across New York and other states in replicating the unique 1+2+1 dual-degree partnership model

mentioned herein, the first of its kind in the country. For years she has been an involved member of numerous nursing education advisory boards. Currently, she also has been an active volunteer for 10 years with Honor Flight Syracuse, an organization that flies veterans to Washington, DC to visit the war memorials erected in their honor. She is the proud parent of two Navy officer veterans and the grandparent to three beautiful grandchildren.