PEARLS Faculty Handbook
Graduate Nursing Programs

v.11 (August 2024)

PLEASE NOTE:

The course schedule is subject to change at any time, as this determination is dependent on several factors including, but not limited to: type of class, enrollment, environmental concerns and *all* applicable current local, state and national data updates and protocols/guidelines.

Pandemic determinations by governmental order and/or Hofstra University mandate supersede any written information contained in course syllabi and other class materials.

Table of Contents

This handbook supplements the information in the Graduate Nursing Faculty Handbook of the Hofstra Northwell School of Nursing (SON) and Physician Studies and contains additional materials required for the PEARLS pedagogy used in several courses in the SON. All faculty members are reminded of their responsibility for the contents of both handbooks in accordance with their teaching roles and responsibilities, as well as the information contained in the SON PEARLS Student Handbook.

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Mission, Vision, Values, and Program Outcomes

Mission

The Hofstra Northwell School of Nursing and Physician Assistant Studies, through an interprofessional learning model, will graduate healthcare professionals who will be prepared to provide quality, holistic, scientifically sound, and patient-centered care while optimizing the health and well-being of diverse populations and communities for the betterment of humanity.

Vision

The Hofstra Northwell School of Nursing and Physician Assistant Studies aims to be the global leader in interprofessional education preparing the next generation of healthcare professionals. The Hofstra Northwell School of Nursing and Physician Assistant Studies will incorporate the diverse academic programs and infrastructure of Hofstra University, as well as the significant clinical activities and educational resources of Northwell Health.

Values

Graduates of the Hofstra Northwell School of Nursing and Physician Assistant Studies will be recognized by their practice and conduct as exemplary health professionals. The core values create the curricular framework for the continued development of our learners' professional identity formation as healthcare professionals. The ten values make explicit for students those tenets of professionalism to be demonstrated in their new healthcare roles:

- **Leadership:** We believe that leadership is an important value for all of our stakeholders. We will inspire both our faculty and students to have the courage to lead and positively influence the future state of healthcare in the 21st century.
- **Scholarship:** We foster a culture of excellence that supports our faculty and students' engagement in the continuum of scholarship, from discovery, integration, application, and education, encouraging them to link scientific inquiry and cutting-edge research with the provision of high quality, evidence-based, patient-centered care to advance global health.
- **Collaboration:** We work to enhance the advanced practice nurses' environment, as well as communities of practice, collaborative efforts to partner with the populations we serve as well as our interprofessional colleagues to provide quality, safe patient care. Collegiality, teamwork, and partnership will be the cornerstone of our success in the advancement of our commitment to the health and well-being of our consumers and each other.
- **Innovation:** We believe in a creative and evolving educational approach to the development of advanced practice nurses, as well as communities of practice, enabling them to respond to the ever-changing needs of a broad spectrum of consumers in a dynamic healthcare environment.
- **Excellence:** We are committed to developing advanced practice nurses, as well as communities of practice, who challenge the existing norms to achieve exemplary value-based healthcare outcomes while increasing access to care.
- **Global Health:** We prepare advanced practice nurses, to function in a variety of settings as well as communities of practice, to impact global health.
- **Humanism:** We prepare our advanced practice nurses, as well as communities of practice, to deliver care that is respectful of and responsive to the preferences, needs and values of the healthcare consumer through effective communication and consumer participation.
- **Learning:** We provide an interprofessional learning environment committed to student-centered academic and clinical development, personal and professional growth, and life-long learning.
- **Courage:** We promote the ethical, moral, and mental fortitude that enables our advanced practice nurses, as well as communities of practice, to advocate in support of the healthcare consumers' values, beliefs, and preferences.
- **Diversity:** In appreciation of the broad range of human needs and perspectives, we support a diverse learning community that prepares our advanced practice nurses, as well as communities of practice, to provide care that embraces the commonalities and differences of our healthcare consumers.

Program Outcomes:
Doctor of Nursing Practice Program
Through the values of leadership, scholarship, collaboration, innovation, excellence, global health, humanism, learning, courage and diversity, advanced practice nurses who complete the curriculum of the respective track of the Doctor of Nursing Practice Program will:

1. Provide comprehensive and collaborative patient care across the lifespan utilizing the best available evidence for diverse populations across the health continuum.
2. Synthesize scientific knowledge from diverse sources, integrating principles of change, contributing to the generation, translation, and dissemination of knowledge.

3. Demonstrate proficiency in the use of improvement sciences and peer review to achieve measurable health outcomes, including, but not limited to, value-based health care.
4. Apply technology and scientific health information to coordinate and deliver personalized health care to diverse populations.
5. Exhibit professionalism and accountability while providing population-based care that upholds ethical and legal principles.
6. Advocate strategies to impact the ethical, legal, and social factors of global health care to a diverse population.
7. Collaborate as a leader and member of the interprofessional team to improve communication and coordination of care to achieve optimal population-health outcomes.
8. Demonstrate the ability to sustain lifelong personal and professional growth while recognizing diversity and respecting consumer preferences.

AGACNP-CRNA Doctor of Nursing Practice Program
Through the values of leadership, scholarship, collaboration, innovation, excellence, global health, humanism, learning, courage and diversity, advanced practice nurses who complete the curriculum of the AGACNP-CRNA Doctor of Nursing Practice Program will:
1. Prepare graduates to become competent certified registered nurse anesthetists who integrate critical analysis from the sciences and humanities, improving health outcomes.
2. Provide a full spectrum of evidence-based anesthesia care throughout populations' life span to optimize health outcomes.
3. Apply and translate nurse anesthesia practice theories based on scientific knowledge and clinical expertise while integrating and improving clinical practice.
4. Demonstrate behaviors that encourage respect for diversity, acknowledge human worth and dignity, impact the ethical, legal, and social factors of global health policy while accepting responsibility and accountability for one's owns actions as a certified registered nurse anesthetist.
5. Apply technology and scientific health information to coordinate and deliver personalized healthcare across the lifespan.
6. Demonstrate clinical scholarship and analytical methods for evidence-based practice to improve professional nurse anesthesia practice and health outcomes.
7. Collaborate effectively as a leader and member of the interprofessional surgical team to maximize communication and coordination of care to achieve the best patient outcomes.
8. Foster an appreciation for the necessity of life-long learning, critical thinking, and continuing to grow personally and professionally while assuming accountability.
9. As a certified registered nurse anesthetist, demonstrate professionalism, accountability, and ownership while providing patient-centered care that recognizes the diversity and respects consumer preferences.

School of Nursing Honor Code Statement
Academic integrity is vital to the mission of the School of Nursing. Nurses are expected to deliver high quality health care and are held to a high standard by the public and health care professions. This expectation begins when you are a nursing student. As a student in the School of Nursing you are expected to adhere to those standards of conduct that govern the profession of nursing.

The profession requires behavior that is becoming of a nurse as outlined in the American Nurses Association's (ANA) Code of Ethics**. Students are expected to adhere to these tenets in all facets of their personal and academic life and to abide unconditionally to the provisions stated above.
**The ANA Code of Ethics is available on-line at:
http://www.nursingworld.org/MainMenuCategories/EthicsStandards/CodeofEthicsforNurses/Code-of-Ethics-For-Nurses.html

What is PEARLS?

Definition
The acronym **PEARLS** represents **P**atient-Centered **E**xplorations in **A**ctive **R**easoning, **L**earning, and **S**ynthesis. It is a small-group, case-based learning (CBL) and problem-based learning (PBL) pedagogy that incorporates several theories and concepts of adult learning in the health professions. What is perhaps most unique about the PEARLS pedagogy is the emphasis and responsibility for learning it places almost *exclusively* upon students. Faculty serve as guides and facilitators of the *process* of the PEARLS pedagogy as students complete the activities required for identifying, organizing, assimilating, and applying the curricular content.

Description
PEARLS, one of the primary pedagogies utilized at the Hofstra Northwell School of Nursing (SON), has been adapted from the Donald and Barbara Zucker School of Medicine at Hofstra/Northwell (ZSOM) and incorporates a "flipped classroom" approach. The PEARLS pedagogy involves multiple learning technologies including instructional and self-directed educational activities.

PEARLS meeting sessions for students are conducted synchronously in small group classrooms, and target curricular goals and objectives, especially those related to content and professional formation including developmental milestones. The use of meeting sessions and the allocation of generous amounts of curricular time to this pedagogy allow organization of students into small groups (comprised of six to ten students) and one faculty facilitator. Faculty facilitators play a major role in helping students actualize both PEARLS and course objectives. The PEARLS sessions are generally conducted on the same day in small group classrooms for the "report out" of the content related to the learning objectives (LOs) developed by the group from the previous case, and the development of the student formulated LOs for the following case.

Additional characteristics of the PEARLS pedagogy in the SON are:
- Integration of technology (via on-line using Zoom available through Canvas) to allow PEARLS sessions to be conducted in a virtual fashion, as necessary. This modality enables participation of group members to be in "virtual" attendance at PEARLS sessions. *The decision virtual sessions will be determined by the School of Nursing in accordance with Hofstra's guidelines and polices. (as outlined on page 1). Please see pages 35-36 for Virtual Learning Guidelines and Expectations.*
- Small group sizes (membership of six to ten students and one faculty facilitator) to minimize time requirements of group activities; group members as well as faculty

facilitators are *randomly* selected and are assigned to different groups each semester, as applicable.
The changing composition of the small groups each semester allows for increased diversity and inclusion through randomized assignment of groups including both students and facilitators to enable a more robust learning experience.

- The assignment of a case(s) exploration for a designated timeframe (i.e., generally for a week) within which a LO session and RO session are conducted.
- Each PEARLS session has a pre-determined, designated duration which may vary from 60-120 minutes. Timeframes for the sessions will be announced accordingly as the semester progresses. Faculty facilitators participate in a joint decision to decrease session timeframes; this will be applied uniformly once determined.
- Increasingly rapid progression to higher order goals and objectives, including those related to content as well as professional formation and development to leverage prior experience and education in health professions content; and
- Development of skills for clinical application of the inherent roles i.e., leader, timekeeper, and scribe.

Through an ongoing, interprofessional relationship with the ZSOM, opportunities exist for continued collaboration with PEARLS faculty development; this occurs on an informal and formal basis beginning with faculty facilitator orientation. These faculty development activities consist of, but are not limited to, peer review activities such as interprofessional ZSOM and SON faculty participation as "observers" during SON PEARLS sessions and ZSOM PEARLS observations by SON faculty facilitators, as well as interactive sessions based on identified issues and concerns. The purpose is to enable dual identification and sharing of learning and improvement opportunities, as well as evaluative purposes for the faculty facilitators of the SON in determining uniformity of the PEARLS process. *It is important that the fundamental goals and objectives of PEARLS are upheld as continual improvements are made in the program based on feedback and student and faculty evaluations.*

Expectations for SON/ZSOM faculty members who observe a PEARLS session are delineated in *Appendix A*.
A specific SON PEARLS Faculty Facilitator Observation evaluative tool has been developed to assess facilitator performance whereby post session feedback is provided (*Appendix B*).

Essential Principles of PEARLS include, but are not limited to the following:
- Assuming responsibility for learning by each student via developing case-based learning objectives (LOs), <u>conducting individual student study in relation to these LOs,</u> and <u>ensuring fulfillment of any gaps in relation to the case-based suggested faculty LOs.</u>
- Applying key concepts of scientific knowledge embedded in "real" patient cases.
- Challenging students to develop higher cognitive levels of analysis, synthesis, and evaluation (focusing on "how" or "why," rather than "what")
- Providing a bridge for linking pre-existing knowledge to new knowledge
- Encouraging students to consider each case from multiple perspectives: science, clinical reasoning, prevention, population health, evidence-based practice etc.
- Requiring that all members of the student group:
  - identify and reach consensus on the LOs developed.

- conduct evidence-based searches for relevant materials to address those LOs.
- come prepared (without aids or notes) to the RO session to engage in higher order discussion including preparation of "triggers" to assist with higher order thinking, as well as discuss/explain/analyze findings of their inquiries with the faculty facilitator present for guidance.

PEARLS sessions are conducted within a professional environment setting. Students are expected to treat all group members with respect by demonstrating professional verbal and non-verbal communication, and to recognize that the cases are based upon actual patients who should be referred to by name and discussed with that consideration in mind.

PEARLS Philosophy and Goals

PEARLS cases are a fundamental component of the curriculum. A theme may be selected for a given timeframe. The case(s) and learning activities represent key concepts that will support the learning related to the selected theme. In PEARLS, the case(s) is initially presented to the students (without any pre-work) which serves as the prompt for learning through the development of LOs by the group (i.e., student formulated LOs).

The PEARLS pedagogy embraces an overarching commitment to excellence as well as encompasses the following PEARLS tenets:
- an "adult learner" environment that values independent study and self-directed learning
- built upon experiential and active small group, case-based learning (CBL)
- conceptualizes knowledge in action, *not memorizing facts*
- highlight on scholarship, higher order critical thinking, and lifelong learning
- emphasis on reflection, assessment, and transformation
- preparation of students to lead and transform advanced practice nursing for the betterment of humanity.

During PEARLS students synthesize knowledge acquired through the biomedical, physical, and social sciences in the context of clinical cases through higher order learning discussions in peer groups. Through this process, students achieve the goals of PEARLS, which are to develop skills in:
- Leadership
- Translating and integrating scholarship into practice
- Graduate level advanced nursing practice
- Interprofessional collaboration for improving patient and population outcomes
- Teamwork and communication
- Acquisition of in-depth knowledge of biomedical, physical, and social sciences
- Practice-based learning and improvement
- Lifelong learning

In this handbook, the PEARLS pedagogy will be described more comprehensively, specifically the goals, objectives, and expectations for SON faculty facilitators, and methods for success. An orientation program will guide novice faculty facilitators in the PEARLS process. (*Appendix C*). *As a PEARLS facilitator, it is essential that you carefully review and frequently reference this handbook!*

A *PEARLS Student Handbook* is provided to all students. This handbook must also be reviewed and referenced by PEARLS faculty facilitators so that they are familiar with the content provided to students to ensure continuity of ideas, implement a shared model for learning, and reinforce expectations.

Unless otherwise noted, PEARLS sessions occur every week, starting with a new case assignment at the LO session. students are expected to conduct and complete their individual, evidence-based search of materials prior to the RO session of the case that usually occurs the following week. **Class schedules and assignments are posted on Canvas.** Students and faculty should check Canvas and email frequently for any updates to the class schedule*****, weekly assignments and materials, and locations of classrooms and scheduled activities.
* *Class and course schedules remain subject to change as per the SON*

The mission, vision, values, and program outcomes of the Hofstra Northwell School of Nursing provide the inherent principles that not only govern the programs and curriculum, but also incorporate the desired behaviors, characteristics, and skills of our graduate level nurse practitioners. These principles are embedded in all aspects of the graduate level curricula and faculty members are expected to adhere and support their actualization in all educational activities.

PEARLS facilitators are integrated in the curriculum as they may also function in additional roles with responsibility for other pedagogies as faculty members. They also may participate accordingly in aspects of other course activities as content experts, role models and/or function in a capacity within their respective specialty. PEARLS facilitators are expected to be available and participate with the entirety of the learning activities linked to the course. There are occasions where attendance of facilitators may be outside of the normal scheduled PEARLS day. It is the responsibility of the facilitator to arrange coverage for their group if they are unable to participate on the scheduled days.

Roles and Responsibilities of the Facilitator

As a faculty facilitator, your role is to promote student development during PEARLS by:
1. Knowing the goals and sequence of the PEARLS format.
2. Possessing a solid understanding of the PEARLS developmental expectations and the applicable course syllabus prior to class initiation.
3. Developing the ability to recognize and foster a higher order discussion.
4. Assessing your group during each session utilizing the PEARLS pillars and the individual students in the group regarding PEARLS developmental expectations.

5. Framing <u>appropriate and thoughtful</u> wrap-up questions based on priority assessment of the group (e.g., may be pre-determined or based on session contents).
6. Encouraging your group to strive for and achieve excellence through role modeling and being actively present throughout the entire session.
7. Following up on students' action plans for improvement to achieve optimal performance during sessions (as discussed during 1:1 assessment meeting with the individual students).
8. Maintaining faculty mentor/advisor role for the same students during the duration their entire academic journey.

Faculty members are role models professionally and academically in all settings. Therefore, they are expected to exhibit behaviors, actions and demeanors that nurture a conducive professional learning environment in which excellence is fostered in all encounters.

1. **Knowing the goals and sequence of the PEARLS format.**
   PEARLS is a case-based learning (CBL) and problem-based learning (PBL) pedagogy that is the foundation and driver of the curriculum. The goals of PEARLS for students are to develop skills in the following areas: Translating and Integrating Scholarship into Practice, Lifelong Learning, Leadership, Teamwork and Collaboration, Critical Thinking, and Acquisition of Knowledge of Biomedical, Physical and Social Sciences. It is the responsibility of the faculty facilitator to assist students in meeting these goals.

   The PEARLS pedagogy utilizes multiple learning technologies including instructional and self-directed educational activities. Students are introduced to the goals of PEARLS during orientation and reoriented at the beginning of every course that uses PEARLS. The presence of PEARLS posters in the small group classrooms also assists in referencing and reinforcement of PEARLS pillars and concepts. Various learning techniques and strategies may be used during PEARLS sessions. Students should feel safe and free to explore expressions of learning styles e.g., using whiteboards for illustrations, drawing charts or pictures, employing computer aids such as video clips or graphics to highlight application of concepts and synthesis of knowledge. Computer resources may be initially utilized (e.g., Google docs) for access to searched references, but these should be limited and not encompass or replace the discussion. Rather, they should be used as adjunctive means to a higher order thinking (HOT) discussion. *(See Glossary for definitions of terms)*

2. **Possessing a solid understanding of the PEARLS developmental expectations and the applicable course syllabus prior to starting the course.**
   For each course that utilizes PEARLS there are specific course goals, outcomes, and areas of focus. It is critical that every facilitator is keenly aware of these, as well as developmental expectations to be achieved prior to facilitating the sessions and that these are reviewed frequently with the group. **All applicable course syllabi must be reviewed by all PEARLS faculty facilitators prior to the beginning of the semester and are available on Blackboard.**

   Student performance will be monitored during each PEARLS session to assess ability to meet PEARLS expectations and standing on the developmental milestones of the program. This will be formally reviewed during the 1:1 assessment, and as needed/warranted by the facilitator. An interactive 1:1 assessment meeting (*See Appendix D)* will be conducted at **least twice**
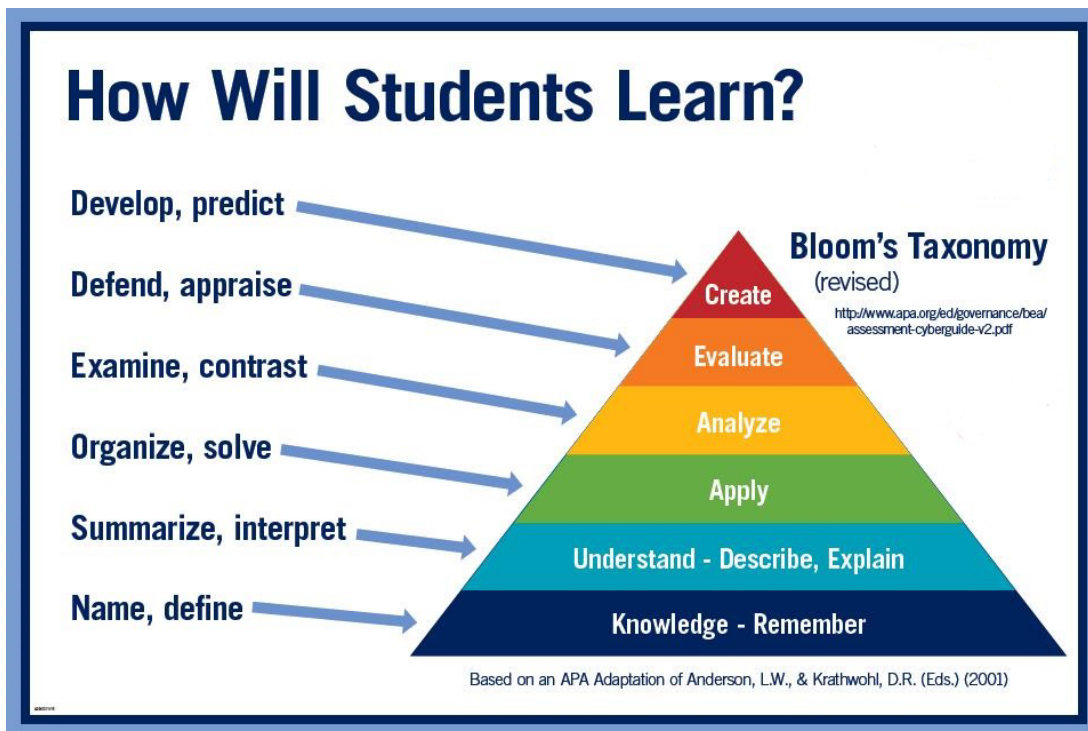
(approximately week five and week nine) during the semester (or more often, as deemed by the facilitator) between each student and facilitator, with feedback provided both verbally and in writing.

3. **Developing the ability to recognize and foster a higher order discussion.**
Higher Order Thinking (HOT) is a term often misunderstood by both new students and new faculty facilitators. It is important that facilitators understand the meaning of this term, so that it is interpreted correctly by students, otherwise it can undermine the credibility of the facilitator.
*Please review and refer to this section on HOT and the subsequent sections in this handbook that also include examples of effective use of **triggers**.*

Please remember that a group does <u>not</u> need to have a higher order learning objective (i.e., use a Bloom's taxonomy higher order verb) to enable a HOT discussion. **Bloom's taxonomy** describes basic level verbs (define, list, etc.) and higher order verbs (compare and contrast, analyze, etc.). A group can utilize a basic LO (i.e., describe the absorptive functions of the small intestine or describe the anatomy and innervation of the forearm) to have a HOT discussion (i.e., if a patient had a roux-en-y bypass, would he/she develop iron deficiency? Or could a person flex his/her forearm if the musculocutaneous nerve was injured and why?)

How Will Students Learn?

Bloom's Taxonomy (revised)
http://www.apa.org/ed/governance/bea/assessment-cyberguide-v2.pdf

- Develop, predict → Create
- Defend, appraise → Evaluate
- Examine, contrast → Analyze
- Organize, solve → Apply
- Summarize, interpret → Understand - Describe, Explain
- Name, define → Knowledge - Remember

Based on an APA Adaptation of Anderson, L.W., & Krathwohl, D.R. (Eds.) (2001)

4. **Assessing your group during each session utilizing the PEARLS pillars and your individual students in relation to PEARLS developmental expectations.**
During each session you will continually assess your group and individual students in relation to PEARLS developmental expectations. These assessments include but are not limited to: 1)

specific group dynamics; 2) individual student progress; 3) use of triggers in stimulating HOT skills and 4) role performances as leader, timekeeper and scribe. Interactive 1:1 assessment meetings conducted at least twice a semester help determine need for improvement in student performance.

The PEARLS Pillars are:
- CBL/PBL Pedagogy
- Group Dynamics
- Higher Order Thinking (HOT) skills
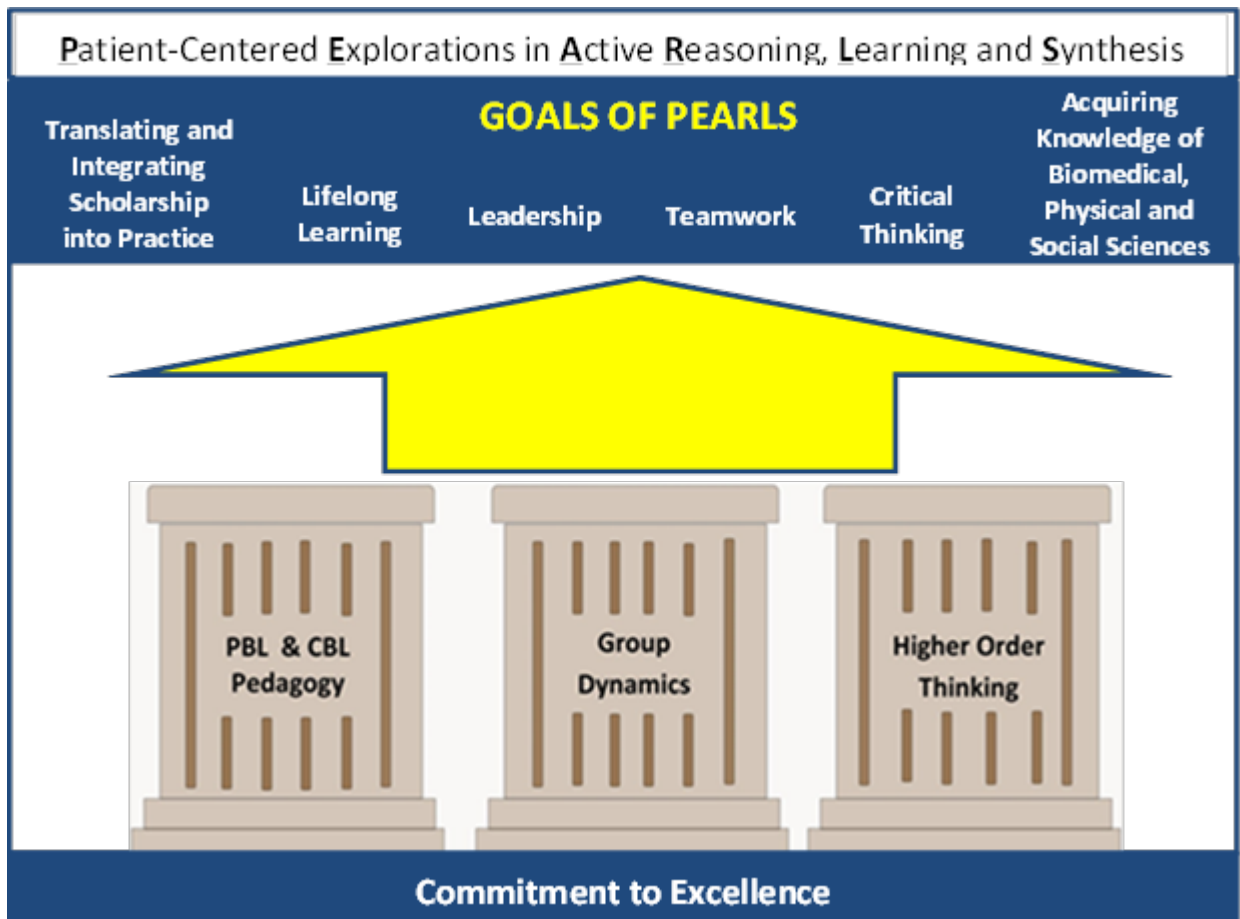
Pillar I: CBL pedagogy includes demonstration of the following:
- Adherence to programmatic ground rules (including, but not limited to: attendance, positive attitude, no electronic device usage, professionalism)
- Preparation for RO sessions
- Timeliness
- Development and discussion of the LOs: process used to develop LOs and how they relate to goal(s) of the case
- Utilization of roles of group members: leader, timekeeper, and scribe: what constitutes "best practices" for each role, and how learners in these roles function to assist with optimizing the educational experience of the PEARLS format

- Discussion of normal and abnormal pathophysiology, pharmacological approaches, as per relevant course(s)
- Inclusion of the school's mission, vision, and values, and other related topics e.g., continuum of care, quality, safety and effectiveness, social context and responsibility, ethical concerns and decision making; how these relate to the case and why important to patient care

Pillar II: Group Dynamics include, but are not limited to, demonstration of the following:
- Group member interaction expectations: no domination or silence, individual "sensitivities need to be left at the door," and challenging each other in appropriate and professional ways (e.g., using evidence-based sources to substantiate and support varying points of view)
- Fully engaged participation by reflecting on what constitutes substantive participation of the entire group, as well as determining if there is evidence of learner participation that heightens the collective group consciousness and knowledge
- Flow of verbal interactions
- Time management skills
- Appropriate verbal and non-verbal behaviors (described on page 14-15 of the PEARLS Student Handbook)

Pillar III: Higher Order Thinking (HOT) involves demonstration of the following:
- Use of metacognition demonstrated by use of critical, logical, reflective, and creative thinking (King, Goodson, & Rohani, 1998)
- Development of learning objectives are formulated using Bloom's taxonomy
- Objectives address biomedical, physical and social sciences, current research and evidence-based practices in healthcare services throughout the lifespan of the population served to optimize health outcomes
- PEARLS RO sessions include the presentation of student developed triggers and corresponding questions. Triggers and questions stimulate discussion about the basic key concepts of scientific knowledge and stimulate the critical analysis of the findings from biomedical, physical and social sciences. *It is not merely repeating facts or unsubstantiated practice guidelines.*
- Assessing the level of discussion in the group: basic discussion of each LO (first-order or lower-order) vs. application of knowledge derived or acquired from a LO to novel situations
- Evaluating the pre-formulated questions and triggers: Were either/both utilized? Were they effective or ineffective and *why*? Did they fulfill criteria of directly relating to the learning objectives of the session and applying information to a new situation, connecting it to other components of the curriculum or relating science and clinical application?

Guidelines for One-to-One (1:1) Assessments
The 1:1 assessment is a scheduled meeting for an evaluation/discussion between the individual student and faculty facilitator; these meetings usually occur at least twice during the semester, or more often as deemed necessary by the facilitator. Scheduling is determined jointly by the faculty facilitator and student and may be conducted either by in person meeting (preferable) or virtual

appointment, if necessary (e.g., using Zoom), ideally around week five and week nine. The purpose of this assessment is to provide a constructive evaluation to date of the student's performance in PEARLS sessions from both the student and facilitator's perspectives.

The following elements pertain to this assessment:
- Enumeration and discussion of the student's strengths and opportunities for improvement in this process (areas considered include, but are not limited to, preparation, substantive contributions, higher order discussion initiation, presentation/use of triggers, and attributes/best practices exhibited in assigned roles)
- Student's performance in role assignment(s) including leader, timekeeper, scribe, and group member
- Completion and assessment of weekly assignments (e.g., understanding of content as well as any areas of concern)
- Development of an action plan (i.e., plan for improvement) for identified areas
- Identification of how the faculty facilitator can assist the student in achieving goals

The article "Learning and Coaching During Office Hours" (Acitelli, Black and Axelson, 2015) may be useful in providing a framework for this assessment and is listed in the References. A 1:1 guideline tool may be beneficial in this process to assist in addressing assessment topics and questions. (*Appendix D*) Following the 1:1 assessment, a written summary is provided to the student as confirmation and maintained on file. Evaluation and documentation of a 1:1 assessment session as well as LO and RO session activities are described in *Appendix E*.

5. **Framing appropriate and thoughtful wrap-up questions.**
   Based upon previous and recent assessments during LO development and RO sessions, as described previously, the facilitator selects an appropriate and thought-provoking wrap-up question with a frame (e.g., PEARLS pillars, mission, vision, and values) during each session for consideration by group members.

   Wrap-up activities at the end of the session also <u>always</u> include provision of a self-assessment and group assessment with rationales by all group members including lastly the faculty facilitator. The group determines the timeframe for wrap-up activities at the beginning of the session (usually 15-20 minutes depending on number of group members).

   Goals of wrap-up for the group are to provide opportunities for:
   - Assisting students' understanding of the different components of the curriculum (spiraling) and how they relate to one another (e.g., large group activities, structure, PEARLS, and simulations), including incorporation of understanding the school's mission, vision, and values, as they relate to the pillars, goals and case discussions.
   - Providing and monitoring students' action plans for improvement based on self and group assessments.
   - Demonstrating the relationship/relevance between basic and clinical sciences.
   - Illustrating the relationship between PEARLS processes and life as a NP engaged in actual patient care as part of an interprofessional team of healthcare providers.

   Facilitator's framing of wrap-up should:

- Be non-leading, not opinionated, and objective.
- Advance student development towards achieving the goals of PEARLS.
- Always contain a linkage with a PEARLS pillar between what you are asking them to comment upon and a purpose for why they are commenting upon the selected area. The following are examples of how to provide a quality wrap-up:

  Example 1 Quality Wrap-up: regarding group needs improvement "Comment upon today's discussion and how your level of preparation affected it."

  Example 2 Quality Wrap-up: regarding group needs improvement "Comment upon the development of today's LOs and provide your understanding of what makes a desirable individual LO and a desirable set of LOs."

Do not solicit students' opinions about the content of the session or process *without* a tie or link to the PEARLS pillars, case goals, developmental expectations, or relationship to the LOs. This is a self-learning strategy established for students to allow them to self-reflect and learn from the process and the framing of HOT questions and triggers in order to facilitate their advancement toward meeting course and program outcomes.

Student's Wrap-up response component:
A student's wrap-up response will have three components: a self-assessment, a group assessment, and a response to the framing question.

The quality of student wrap-ups will advance over time to ultimately include:
- providing self and group assessments of both process and content
- reflecting on both what went well and the opportunities for improvement
- including suggestions for improvement (i.e., an action plan); and
- posing a thoughtful response to the framing question.

Facilitator's wrap-up response component:
After all students have addressed the wrap-up components, the facilitator provides a response to the wrap-up question and self-assessment and group assessment responses. The faculty facilitator's wrap-up response includes:
- a self-assessment of your role as a facilitator;
- modeling for them how to self-assess both individual and group (commenting upon what went well and did not go well and *why*); and
- lastly, offering your response/comments about the wrap-up frame.

At times, you may need to model specific examples for them, e.g., if you asked how they could have integrated more pharmacology into the RO session today, you may need to give a specific example of how/where they could have done so in today's discussion after the group completed their wrap-up responses.

Please review and refer to the list of common scenarios and suggested wrap-up frames for consideration discussed in the next section

6. **Encouraging your group to strive for and achieve excellence through role modeling and remaining actively present in the group and wrap-up framings**.
A group will rise to the occasion and advance when they feel their facilitator truly has their best interests in mind, provides a safe learning environment, considers herself/himself as part of the group, and holds herself/himself accountable to the same expectations to which the group is held.

Setting this culture expectation occurs at the ***initial*** meeting with your group and must be promulgated with each following session. *Be a role model for them.* If you are stressing self-assessment, it is important that you provide a meaningful, clear, and comprehensive self-assessment. If you are discussing why a certain aspect of the session was not as useful as it could have been, provide a specific example to them during your wrap-up response of how it might have been improved and *why*.

For the facilitator, being actively present in the group discussion *does not mean* actively talking! However, it ***does mean*** active listening, observing, following the conversation, and asking a probing question *only* if/when appropriate. There are two categories of probing questions faculty facilitators can pose to a group: (1) questions to facilitate process (usually appropriate for the LO Development session) and (2) questions to drive higher order thinking and discussion (usually appropriate for a RO session). Probing questions should never be "recall" questions in which students are asked about a specific fact. Always remember that to achieve the goals of PEARLS, facilitators must never give content in a group session. No fact is so important that a facilitator should compromise the goals of PEARLS just to make sure a group is aware of that fact. It takes some time and experience as a facilitator to know the "right" time for posing probing questions. Assess the effectiveness of your probing questions on your group as you use them and reflect on them in your self-assessment to help refine this skill.

Additional Responsibilities of PEARLS Facilitators:
- Attend all PEARLS Facilitator/Faculty meetings and Faculty Development sessions. Additional observation dates for PEARLS sessions at the ZSOM may be scheduled at any time with the ZSOM course coordinator.
- Maintain attendance records and record lateness and early departures. If you receive an email from a student stating that she/he will be absent/late, also forward the email to the SON Course Coordinator.
- Schedule each group member for a 1:1 assessment meeting with you at least twice during the semester, or more often as deemed necessary, to review performance to date. An action plan for identified areas for improvement should be discussed, agreed upon, and tracked. Tracking will occur through follow-up 1:1 meetings and students' self-assessments provided during PEARLS sessions.
- **Provide students with feedback on timely submission of course assignments in canvas and review the PEARLS assessment criteria for the sessions.**
- Maintain consistency of the PEARLS process by adhering to the inherent principles and programmatic rules (or non-negotiables).

Facilitation Methods for PEARLS Sessions

The overall goal of every PEARLS session is to ensure a dynamic, productive, and fully interactive session that is conducted in a safe, learning and professional environment. The facilitator should ascertain that the students comprehend the goals, enable a conducive environment, and assist the group with the appropriate process to attain the goals of the session.

The Initial LO Session

Initiating the group in the desired context and manner is a key to success! Setting the expectations, ensuring understanding (especially the purpose of the pedagogy), and discussing group members' behaviors/ performance should be accomplished. *This session is crucial to the development of the group and setting the stage for the group to get to know each other and the tone in how the group will relate, build trust, adhere to the programmatic ground rules, and develop positive communication to meet the group's learning needs.*

During the initial check-in at the beginning of the academic year, provide each student with an opportunity to state the name that he/she would like to be addressed as, and as time permits, to describe his/her background, where he/she works, and perhaps something unique about himself/herself, or why they chose to enroll in the graduate nursing program. This initial check-in may take 20-30 minutes; however, subsequent check-in times should be approximately 10-20 minutes as per group determination. As part of introductions, students may be asked by facilitators to comment on what expectations each of them has for the group and/or how they plan to get there.

After students complete their introductions, welcome them, and introduce yourself including your field of practice, what your current area of interest is, and share with them why you are a facilitator and what your role encompasses. Explain that this is not the facilitator's group nor is it the student's group; rather, the group belongs to the group, and that *facilitators are equal members of the group with different roles. Use the word "we" to signify that you are all part of a team together.*

Setting Expectations for PEARLS Sessions
- ***Review and explain the programmatic ground rules.*** Speaking extemporaneously about the ground rules (non-negotiables) rather than reading them directly would be best. Reinforce that you will hold yourself accountable for the same ground rules to which you hold them accountable regarding the following: (1) being ready at the start of sessions; (2) presenting a positive attitude, regardless of what is going on outside of the group (e.g., personal life); (3) conducting self-assessments and group assessments as part of every wrap-up; (4) complying with all other applicable activities and responsibilities expected of group members. *Continue to model these behaviors and exemplify them in every subsequent PEARLS session.*
- Discuss your personal expectations for them including, but not limited to:
  - striving for excellence (an underlying goal)
  - focusing on learning e.g., relevant course objectives, as applicable, by extracting the scientific and physiologic mechanisms embedded in the case by "diving deep" into the material

- maintaining a "zero tolerance" policy regarding disrespectful dialogue and unprofessional behavior in group
- exhibiting a positive attitude at all group sessions, e.g., demonstrating a willingness to challenge and be challenged academically (not personally)
- upholding the programmatic ground rules as the way to achieve these expectations.

- ***Attendance at all sessions is expected.*** Each member of the group plays a critical role in the functioning of the group. Out of respect for colleagues' time and need for completion of the activities within the specified session timeframe, all members need to be present, prepared, and ready to begin on time. students should e-mail facilitators and the appropriate course coordinator/SON faculty/staff with any anticipated absence or lateness.

- **Provide students with your Hofstra e-mail address which is the <u>only</u> university accepted method of communication with students.**
  Using text messaging or personal e-mail correspondence are not acceptable methods between faculty and students in accordance with the policy of Hofstra University.

- Share that you will be taking notes during the sessions, as this helps to provide objective information when completing assessments.

- ***All electronic devices should be turned off for the duration of the session as these are distractions to the group.***

- Synchronize all clocks and personal devices so that all group members are aware of the start and stop times during the session (this should be regulated by the timekeeper). Teamwork and time management are essential skills when working with groups. This practice has been shown to result in productive group work.

- ***Groups must assign a leader, a timekeeper, and a scribe.*** Equitable distribution among group members is required for the roles of leader, timekeeper, and scribe. These roles may be predetermined at the beginning of the semester or determined prior to the sessions. Ensure that a leader and timekeeper are identified for all LO and RO sessions; a scribe is only required for the LO sessions. The leader and timekeeper may remain the same for the LO and RO sessions for a designated case.
  - **Role of Leader:** Functions as the process leader, not leader of the discussion content. The leader has four key functions:
    - Works with the group at start of sessions to: 1) set the agenda by deciding which LO/topics will be discussed; and 2) decide how much time will be allocated for each discussion (including triggers) with the group.
    - Refers group back to the goal of case if the discussion is getting off track or if the group is confused about whether an issue is important or relevant to the case.
    - Encourages participation from all group members at all sessions.
    - Ensures that the group has synthesized material and that all group members are comfortable with their level of understanding of the material periodically throughout the session.
  - **Role of Timekeeper**: Keeps group members aware of their use of time and on schedule with an agreed-upon time allotment for each agenda item. The timekeeper should verbally announce time remaining at points decided upon by the group (e.g., every 15 minutes, halfway point, and 2 minutes left, etc.). If time is up for an item, the group decides if they want to add time for further consideration of that item while adjusting time for other items.

o **Role of Scribe** (only LO session): Creates a visible record of the LOs developed by the group and has the ultimate responsibility for uploading and posting the group's finalized list of LOs to Canvas.

Goal for PEARLS Learning Objective (LO) Development Sessions:
Students should be able to identify at least 80% of the LOs (as compared to the faculty developed LOs) for the case. This comparison denotes whether the case is constructed well and is interpretable by students. Case LO comparison is a component of students' "check-in" at the LO session and facilitators should also assess a comparison rate for their group's developed LOs with faculty provided LOs. These comparisons may be calculated after the case is discussed at the RO session and reviewed by the group at the LO session during "check-in." Any identified knowledge gap areas may be covered in other learning activities or in a "review and reinforcement" (R&R) session.

Responsibilities for facilitation of LO Development Sessions:
- The Course Coordinator or SON Faculty/staff will inform the facilitator of any student(s) who have sent an email or called with an attendance/lateness issue.
- Ensure receipt of the facilitator's (also contains the faculty developed LOS) and students' copies of the PEARLS case for distribution at the beginning of the LO session. Students' copies do not contain the faculty developed LOs. Copies of the case are distributed to all PEARLS groups simultaneously by the facilitators.
- Promptly begin the PEARLS session at the scheduled time with check-in (i.e., do not delay if any students are late; start with students who are present). Check-in should take approximately 10-15 minutes depending on group size. During check-in, group members individually self-assess their understanding of the content from the prior week by reflecting upon their completion of the weekly assignment(s) as compared to the faculty responses and compare the group's formulated LOs with the faculty expected LOs for the case. **Students are responsible for the content of the faculty developed LOs if not captured in their group developed LOs.** Facilitators should ask group members if they have any clarification requests.
- Opportunities for learning about topics that remain obfuscated and/or require clarification should be identified and resolved in the following manner:
  - student self-identification of knowledge gaps
  - facilitator aggregation of student self-identified weekly knowledge gaps
  - aggregated topics reviewed by facilitator for determination of need for a R&R session (e.g., content expert, SON faculty)

Conduction of LO Development Sessions:
Each case paragraph is read out loud by a student group member. After each paragraph the group stops, discusses the material, and develops learning objectives. As the case unfolds, material presented should be given thorough consideration before advancing to the next paragraph. (Encourage group members to interpret the vital signs and physical examination findings as they read them. For example, instead of reading the vital signs as "the blood pressure is 90/50 mmHg, the heart rate is 110/minute, and the temperature is 102 degrees F," they should interpret them as, "the patient is hypotensive, tachycardic and febrile.")

If students are having difficulty developing LOs, probing questions by the faculty facilitator may be used. Specific guidance may be offered by the following:

- Redirect them to the PEARLS case-specific goals.
- Be attentive when students seem unsure of the facts they are discussing, appear confused, disagree with each other, and/or express that they need to understand something better. If this occurs, ask the group if there is a learning issue they should list on the board (or place in the parking lot).
- Consider the LOs they are developing and ask questions so they can expand those LOs. Evaluate normal (physiology, histology) with abnormal (pathology, pathophysiology)
  - *Example:* Students develop LOs on the pathophysiology of diabetes. For example, ask the group if it is fair to assume that they understand the normal physiology and histology of the pancreas.

Gauge scientific mechanisms with clinical signs and symptoms (ask the *why* question that explains the clinical findings).
  - *Example*: Students develop LOs on clinical presentation of myocardial infarction. For example, ask the group, "What is the mechanistic basis for why someone presents with the characteristic symptoms of a myocardial infarction?" Or "Is it fair to assume that you understand advanced pathophysiology of myocardial infarction?"

Other examples include the following:
  - In a PEARLS case with a patient with both hypertension and an audible S4 on exam, the students should create LOs such as: Explain the significance of an S4 on physical examination and the mechanism responsible for it.
  - In a PEARLS case with a patient with pulmonary embolism, the students should create LOs such as: Explain the mechanism for why fibrinogen and d-dimer are elevated in a patient with a pulmonary embolus.

Please note: *Each student is responsible for reviewing evidence-based sources and using higher order thinking skills for every LO identified by the group. Group members will help one another synthesize their knowledge, but a prerequisite for this higher order learning is that each group member initially seeks out knowledge on his/her own.

Goal for PEARLS Report Out (RO) Sessions:
Students will initiate a higher-order discussion around the LOs they previously developed by focusing on their respective course objectives including, but not limited to: (a) scientific mechanisms of diseases, (b) normal and abnormal pathophysiology and function of systems and structures, and (c) pharmacologic/therapeutic considerations.

Responsibilities for facilitation of RO Sessions:
- The Course Coordinator or SON Faculty/staff will inform the facilitator of any student(s) who have sent an email or called with an attendance/lateness issue.
- Promptly have students begin the session at the scheduled time. Do not delay if any students are late; start with students who are present and request an interim volunteer if a group member assigned to a role will be late. The leader should set the agenda, establish time allocation for activities with the timekeeper and group, and designate inclusion of trigger discussion, as indicated.

Conduction of RO Sessions:
If you find yourself wanting to ask a content driven question, pause and ask yourself the question behind the question. *Why* do you want to ask it? Try to figure out what element the group is not understanding or getting to and ask the question in a more broadly applicable way:
Example: If you strongly desire to tell the students that hypokalemia is a common side effect of furosemide which was not brought up in their discussion, realize that the group has not been able to discern the drug's most common side effect. A question to pose that would be more broadly applicable would be "What sources do you use to determine the most common side effects of drugs when you discuss them?" By asking this, you are role modeling for them a better process to use as opposed to just highlighting a single fact about a single drug.

*Probing questions to consider using if/when appropriate:
- *Why?* This can be asked multiple times, regardless of whether you think a student's comment is right or wrong, to reveal students' degree of understanding and ability to support or define what they are saying. ***Asking "why?" helps students understand what they know and what they need to learn.***
- What if a pathway is blocked or there is an interruption of information transmission?
- What if you change the age/ sex / co-morbidity of the patient?
- A student presents a mechanism on the board: Ask the group members if one of them has considered different possibilities.
- "Can you compare and contrast…?" May be used in a variety of ways to encourage and facilitate development of general principles and abstractions along with methods of differentiation. As students consider common features or themes ("threads") among different problems, students may discover overarching principles.
- "What is the mechanism?"
- "What is the pathophysiology?"
- "How does the mechanism correlate with the clinical findings?"
- "How do the clinical findings relate to the pathophysiology of the disease process?"
- "How does the mechanism and/or clinical findings relate to drug toxicity?"
- "Can you propose…?"
- "What was your source? Is it evidence-based and how did you assess this?" *This question will often reveal conflicting sources of information, which group members will have to resolve.*
- "Does everyone agree with that statement?"
- "What would be the intended and unintended consequences (of a therapeutic or pharmacological intervention, etc.)?"
- Lab results: when group members comment on abnormal labs, facilitator can probe for the mechanism by which the lab value was produced.
- Use a recap before proceeding to the next LO or trigger; ask the group – "Are we all on the same page?"
- State "Hold on - let's define this/these terms."
- Bring the discussion to the next level by asking "Why do you want to know _____?"
- "Why are we doing/discussing this?"
- "Are we ready to move on?"

- "Is there more to discuss on_____?"
- "Let's develop a list of principles."
- "What do you mean by _____?"
- "Are you saying that_____?"
- If the group moves too quickly off a topic/subject, state "But what are you going to do about_____?" "You mentioned _____before, why?"
- "Why would you come to that conclusion?"
- "How could you frame that question differently?"
- "Is everyone clear on _____?"

When in doubt as to whether you should ask a question, wait a few minutes, and then decide if you still think you should ask it.

Please Note: Students in the early stages of PEARLS RO sessions may initially be permitted to use or refer to written or computer notes to initiate or continue a discussion. However, by the third case discussion, all notes should be discontinued as this practice does not support active listening nor promote HOT.

Assessments and Paired Wrap-Ups for Early PEARLS Groups
Included below are examples of assessments a facilitator may make regarding a PEARLS group's performance using the framework of the PEARLS pillars. To target performance gaps identified through these assessments, the following wrap-ups are recommended:

PEARLS Pillar Domain: **CBL/PBL Pedagogy**
- o **Performance gap:** Group members show up late to group.
  Wrap-up frame: Comment upon one aspect of group that went well today and one aspect that will not happen again.
- o **Performance gap:** Group members not preparing same points for discussion.
  Wrap-up frame: Comment upon your understanding and preparation for LOs discussed today - what went well and what could be improved and relate this to the LO development.
- o **Performance gap:** Group members unsure of roles in group sessions and of the process of PEARLS.
  Wrap-up frame: Comment upon your understanding of both the role of the student and the facilitator in PEARLS and how these relate to the goals of the program.
- o **Performance gap:** Group member(s) not as well prepared as expected.
  Wrap-up frame: Comment upon your level of preparation for today's session and how that affected the group today.
- o **Performance gap:** Session was not well organized, no agenda was set, and the timekeeping was lacking.
  Wrap-up frame 1: Comment upon how the session was organized today, what you think went well and why and what you think did not go well and why.
  Wrap-up frame 2: Comment upon the use of time management today, what went well and what can be improved, and what you might take away from this for future sessions.
- o **Performance gap:** Group was not all on same page regarding depth/definition of LOs.
  Wrap-up frame: Comment upon what characteristics you feel are necessary for an effective LO, what this means, and why it is important for everyone in group to have the same understanding of what is meant by each of the LOs.

- o **Performance gap:** Group members asking for content from facilitators or questioning something about the facilitator's role (e.g., why facilitators don't correct mistakes, give out content, etc.).
  Wrap-up frame: Comment upon your understanding of the role of the facilitator and how this role relates to the goals of the PEARLS process.

PEARLS Pillar Domain**: <u>GROUP DYNAMICS</u>**
- o **Performance gap:** Some group members dominate the group, are disrespectful to others**,** lecture, or derail conversation.
  - **Wrap-up frame 1:** Consider the interactions among group members today and describe what you consider to be the most beneficial ways for members to interact during group.
  - **Wrap-up frame 2:** Comment upon how you determine what a substantive (useful) contribution to group discussion is vs. something tangential to the discussion at hand.
- o **Performance gap:** Group participation is uneven (as long as this does not apply to just one person).
  - **Wrap-up frame 1:** Comment upon the evenness in group today, how that impacted the group's learning and what changes if any you would suggest with respect to this for next session.
  - **Wrap-up frame 2:** I would like you to think about the evenness of the group and its importance. Does it change or is it the same in both LO and Report Out sessions? Evenness can refer to someone speaking too much or too little as well as someone being ignored.
- o **Performance gap:** Conversation difficult/not flowing well.
  - **Wrap-up frame 1:** Comment upon what factors you think are responsible for the flow of today's conversation that you would identify as ones to repeat or not repeat for future sessions.
  - **Wrap-up frame 2:** Comment upon what constitutes an effective PEARLS session and the roles of the student and facilitator in contributing to that process.

PEARLS Pillar Domain: **<u>HIGHER ORDER THINKING</u>**
- o **Performance gap:** Students have a lower-order first-order discussion of some LOs and a higher order discussion of other LOs.
  Wrap-up frame: Compare and contrast your definitions of a first order vs. higher order conversation and give examples of one or both from today's session.
- o **Performance gap:** Students believe they are having a higher order discussion, but don't really understand the definition of such. For example, they bring in journal articles, raise "interesting" facts or cite cases tangential to the LOs. Ideally, students have a higher-order discussion when they apply knowledge from LOs for the current case to new scenarios or make connections between that knowledge and other basic science topics and/or clinical signs/symptoms.
  Wrap-up frame: Compare and contrast your definitions of a first order vs. higher order conversation and give examples of one or both from today's session.

Use of Triggers (to promote higher order thinking and discussion):

Additional resources include a power point presentation and class materials on the use of triggers authored by Dr. Cassara (available to faculty and students on Blackboard). These resources will assist you to increase your ability to enable students to achieve these goals.

Sample triggers from Hofstra Northwell SON and ZSOM: A student:

- proposed how each concept (presented pictorially of gas pump, oil leaks, sludge) of automotive parts related to different types of shock.
- related the activation/pop of champagne to the complement system.
- asked how zero order and first order metabolism relate to phenytoin metabolism and what are the clinical implications.
- proposed how an EEG serves a purpose in the diagnosis of seizures and asked students to support answers.
- had the group look at two CBC results and asked for a differential diagnosis if one were to see each of them separately. Student also asked if the diagnosis of CML could be missed from each of these CBCs and why.
- illustrated a flow chart picture of the development of blood cells and asked where the abnormality occurs for the development of CML. Student also asked what would happen if the lesion occurred in various, different spots.
- brought a picture of two sets of histopathologies (blood, bone marrow aspirate and bone marrow biopsy). One was normal, the other abnormal, and asked the group which was healthy, which diseased and to describe what they were seeing and why.
- created the following clinical problem: A mother brings in her child who has sickle cell alpha-thalassemia. What would you expect to be the MCHC to be on the patient's CBC? How would this patient's prognosis compare to a patient with HBSS? What clue(s) on hemoglobin HPLC might have helped to make the diagnosis of sickle cell/alpha thalassemia?
- asked regarding the O2 dissociation curve, about the Bohr effect, i.e., what environment in the body does this occur in and why?
- posed the following questions as triggers for sickle cell disease:
  - If you have a bad beta chain, does it help to have thalassemia and why? In a heterozygote for sickle cell what is the ratio of normal to sickle hemoglobin and why?
  - Why does alpha-thalassemia lead to less symptomatic sickle cell? There are phase 1 trials utilizing injected CO to treat sickle cell- how does this work and why?
  - How can you differentiate between hemolysis and hemorrhage from the lab reports without a history?
  - Why do you see avascular necrosis in the locations that you do?
  - What are some of the physiologic changes to a healthy mother in a normal pregnancy; how does sickle cell affect these?
- presented a picture of a mother and a very small statured daughter with clinical signs of XP and asked which mutation and penetrance type led to the clinical picture and why.
- brought in a remarkable animation of the pathways the student had prepared. Student proceeded to ask questions regarding what would happen if the pathway were perturbed at a particular point, and "why do some proteins need to be phosphorylated at two sites to be active?"

- proposed the following trigger: 90% of DVTs occur in the left leg during pregnancy; what is the physiologic basis for this occurrence?

PEARLS Developmental Expectations

Students and faculty facilitators are randomly assigned to PEARLS groups for the semester. For each course, there are expected behaviors to achieve the goals of PEARLS and developmental milestones based on standards from the National Organization of Nurse Practitioner Faculty (NONPF), the American Association of Colleges of Nursing (AACN) The Essentials: Core Competencies for Professional Nursing Education (2021), Council on Accreditation of Nurse Anesthesia Accreditation Programs (COA), and the Interprofessional Educational Collaborative (IPEC) Core Competencies for Interprofessional Collaborative Practice. These milestone achievements provide a longitudinal assessment framework for competency-based education and completion of program outcomes. Integration of the domains listed below provide a robust framework for competency-based education during PEARLS. *Expectations will increase in complexity to prepare students for their roles in advanced practice nursing.*

PROFESSIONALISM

The programmatic ground rules (i.e., non-negotiables) in PEARLS provide the basis for modeling and upholding aspects of professionalism. These principles emanate from various disciplines' professional standards including nursing, medical, and health care professional organizations and their application in health care settings. Targeted and expected behaviors and attitudes in PEARLS exemplifying professionalism include, but are not limited to: 1) positive attitudes in group members; 2) demonstration of attentive listening by engagement in group discussion by student group members; 3) non-verbal behaviors (e.g., body language) that convey interest and respect for group members; 4) maintaining an open mind and considering the input of others; 5) listening and reflecting on group members' input and offering *substantive* comments (i.e., bidirectional rather than unilateral communication); 6) providing thoughtful, insightful responses that contribute to higher order discussion; 7) offering constructive self and group improvement strategies during wrap-up; 8) presence and punctuality at all PEARLS sessions and educational activities and; 9) thorough PEARLS preparation.

Ethical considerations in PEARLS cases may be identified by students. Implications for pharmacologic mechanisms and choices as well as genetic, cultural, and psychosocial factors may pose professional role concerns which affect a process of care or outcome of a case. Recognition of the need for awareness of ethical issues and clinical decisions are integral in assessment and treatment plans.

KNOWLEDGE FOR NURSING PRACTICE

CBL/PBL pedagogy is used to provide realistic case scenarios upon which the student can formulate and build on the knowledge gained in the scientific courses e.g., Advanced Pathophysiology Across the Life Span, Advanced Pharmacology and Pharmacotherapeutics. Cases are assigned to students who must construct learning objectives (LO) collectively in their small group settings based on considerations of what they know, don't know, and need to know. As adult learners, students are responsible for searching for evidence-based resources grounded in scientific foundations related to the LOs they developed, and for preparing their presentation in their groups. Group and individual students' presentations are expected to increase incrementally through

demonstration of higher order thinking (HOT) skills as evidenced by each member's substantive contributions and the group's engagement in higher order discussion. Further advancement of this type of HOT is reflected in the effective use of triggers by each student group member as a formal means of catalyzing the group toward this goal. The effects of group dynamics and learning strategies used by students in this process are monitored and evaluated through self, group, and faculty assessments at the end of the session. Emphasis and focus on pathophysiologic mechanisms allow students to gain a strong foundation of normal cellular and systems functioning for progression to understanding abnormal functions which may manifest in the signs and symptoms presented by a patient. A knowledge base builds as pharmacologic mechanisms are also integrated into the cases. This will enable students not only to differentiate between normal and abnormal cellular and systems functioning, but also evaluate how the mechanisms of action of pharmacotherapeutic agents affect these.

PERSONAL, PROFESSIONAL, AND LEADERSHIP DEVELOPMENT

Role assignment is inherent in every PEARLS session whereby students assume responsibilities for the roles of leader, timekeeper, and scribe (in only the LO session). As teamwork and communication are integral to improving patient safety efforts and quality of care, students participate in small groups with roles and responsibilities designed to build leadership and team building skills with efficiency and effectiveness.

In every PEARLS session a student is formally assigned the role of leader; this role pertains to the process rather than the content of the discussion. The leader is expected to participate fully in the group discussion including the progression toward higher order (*with the exception of trigger presentation*). The leader is responsible for the following functions: setting the agenda to ensure that all activities are completed within the timeframe; collaborating with the timekeeper to keep the group on target; participating throughout and remaining fully engaged in the discussion; periodically ensuring that the group members have synthesized the material and are comfortable with their level of understanding; and assuring that all LOs constructed by the group are fully discussed.

Best practices for leadership functioning and advanced skills may include, but are not limited to: ability to engage all members in the discussion including drawing in quiet students without embarrassment or intimidation; setting agendas that enable timely and thorough completion of activities; fostering ongoing participation of group members to promote evenness as well as substantive and higher order discussion; and demonstrating creativity in trialing new approaches to agenda completion and learning opportunities.

QUALITY AND SAFETY/ SYSTEMS-BASED PRACTICE

Through a rapid transition progressing toward higher order discussion and initiation of triggers in PEARLS, group members are expected to quickly progress in their abilities to: master the content assimilated from their independent studies, reflect on their thinking about new knowledge gained, analyze how this new knowledge is manifested through expressing thoughts and ideas in higher order discussions and their abilities to engage in and utilize effective triggers to stimulate a higher order discussion among group members. They should seek to increase their skill set by asking

questions such as, "Why" and "What if," as a means to explore and gain a wider and deeper knowledge base. In this progression, students must consider aspects of quality, patient safety, and cost effectiveness relevant to the populations across the lifespan.

Small Group Dynamic Considerations

All facilitators must be actively present with their group at all times. Active presence does not mean actively talking. The facilitator should be seated at the table with the group, <u>clearly listening and closely following the flow of the conversation</u>, posing a probing question if and when appropriate, taking notes on the session, assessing the group along the PEARLS pillars, and continually considering ideas for how to frame that session's wrap-up.

The facilitator should not overcorrect the group. If it's not a non-negotiable, leave it up to the group to decide. Don't micromanage these issues. If a usually well performing group suddenly has an "off day," don't make a big issue about it. You can mention it during your personal comments in wrap-up (and most likely the group will have already identified the problems/issues encountered in their self and/or group assessments). Iterate that this can and does happen, that this suboptimal experience is not characteristic and to consider any "lessons learned." Complete any remaining activities and encourage the group to move forward.
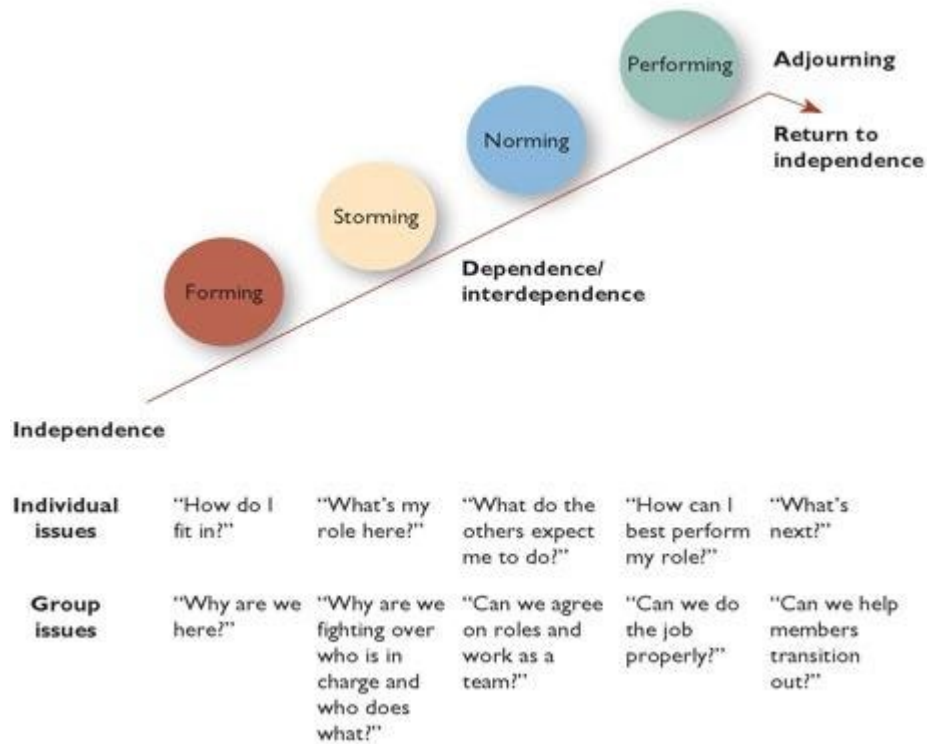
Only single people out in a group session for positive aspects or behaviors, e.g., leadership strategy, evidence-based source. If an individual warrants negative feedback or critique, provide this to the individual after the session or in a 1:1 assessment and *never* during the group session.

Don't get "hard line" with the group regarding group dynamics or process that is within the perimeter of the non-negotiables (e.g., LO versus learning issue (or parking lot), or raising an issue of group dynamics that was not an issue for the group.

When there is a problem situation, diffuse this immediately. Never make it a group issue if you don't have to or acknowledge it in group if you don't need to. If a situation needs to be addressed, do so promptly and outside of the group, if possible. Reassure group members as warranted and proceed accordingly.

Bear in mind the model of **Tuckman's (1965) Stages of Group Development**: forming, storming, norming, performing (and adjourning which was subsequently added).

Tuckman, B. and Jensen, M. (1977). Stages of Small-Group Development Revisited. Group & Organizational Studies, 2(4), 419-427.

Table (from figure):

	Forming	Storming	Norming	Performing	Adjourning
Individual issues	"How do I fit in?"	"What's my role here?"	"What do the others expect me to do?"	"How can I best perform my role?"	"What's next?"
Group issues	"Why are we here?"	"Why are we fighting over who is in charge and who does what?"	"Can we agree on roles and work as a team?"	"Can we do the job properly?"	"Can we help members transition out?"

Source: Retrieved 8/2/16 from http://www.kunnaree.files.wordpress.com/2015/05/tuckmans-5-stage-theory.jpg

Judith Stein describes these stages in "Using the Stages of Team Development" excerpted below from:

Stein, J. (2016). Using the stages of team development. *HR at MIT| Learning and Development*.

"Team effectiveness is enhanced by a team's commitment to reflection and on-going evaluation. In addition to evaluating accomplishments in terms of meeting specific goals, for teams to be high performing it is essential for them to understand their development *as a team…"*

"The four stages are a helpful framework for recognizing a team's behavioral patterns; they are most useful as a basis for team conversation, rather than boxing the team into a "diagnosis." And just as human development is not always linear (think of the five-year old child who reverts to thumb-sucking when a new sibling is born), team development is not always a linear process. Having a way to identify and understand causes for changes in the team behaviors can help the team maximize its process and its productivity.

Stage 1: Forming
Feelings
During the Forming stage of team development, team members are usually excited to be part of the team and eager about the work ahead. Members often have high positive expectations for the team experience. At the same time, they may also feel some anxiety, wondering how they will fit in to the team and if their performance will measure up.

Behaviors

Behaviors observed during the Forming stage may include lots of questions from team members, reflecting both their excitement about the new team and the uncertainty or anxiety they might be feeling about their place on the team.

Team Tasks

The principal work for the team during the Forming stage is to create a team with clear structure, goals, direction, and roles so that members begin to build trust. A good orientation/kick-off process can help to ground the members in terms of the team's mission and goals and can establish team expectations about both the team's product and, more importantly, the team's process. During the Forming stage, much of the team's energy is focused on defining the team so task accomplishment may be relatively low.

Stage 2: Storming

Feelings

As the team begins to move towards its goals, members discover that the team can't live up to all their early excitement and expectations. Their focus may shift from the tasks at hand to feelings of frustration or anger with the team's progress or process. Members may express concerns about being unable to meet the team's goals. During the Storming stage, members are trying to see how the team will respond to differences and how it will handle conflict.

Behaviors

Behaviors during the Storming stage may be less polite than during the Forming stage, with frustration or disagreements about goals, expectations, roles and responsibilities being openly expressed. Members may express frustration about constraints that slow their individual or the team's progress; this frustration might be directed towards other members of the team, the team leadership or the team's sponsor. During the Storming stage, team members may argue or become critical of the team's original mission or goals.

Team Tasks

Team Tasks during the Storming stage of development call for the team to refocus on its goals, perhaps breaking larger goals down into smaller, achievable steps. The team may need to develop both task-related skills and group process and conflict management skills. A redefinition of the team's goals, roles and tasks can help team members past the frustration or confusion they experience during the Storming stage.

Stage 3: Norming

Feelings

During the Norming stage of team development, team members begin to resolve the discrepancy they felt between their individual expectations and the reality of the team's experience. If the team is successful in setting more flexible and inclusive norms and expectations, members should experience an increased sense of comfort in expressing their "real" ideas and feelings. Team members feel an increasing acceptance of others on the team, recognizing that the variety of opinions and experiences makes the team stronger and its product richer. Constructive criticism is both possible and welcomed. Members start to feel part of a team and can take pleasure from the increased group cohesion.

Behaviors

Behaviors during the Norming stage may include members making a conscious effort to resolve problems and achieve group harmony. There might be more frequent and more meaningful communication among team members, and an increased willingness to share ideas or ask teammates for help. Team members refocus on established team ground rules and practices and return their focus to the team's tasks. Teams may begin to develop their own language (nicknames) or inside jokes.

Team Tasks

During the Norming stage, members shift their energy to the team's goals and show an increase in productivity, in both individual and collective work. The team may find that this is an appropriate time for an evaluation of team processes and productivity.

Stage 4: Performing

Feelings

In the Performing stage of team development, members feel satisfaction in the team's progress. They share insights into personal and group process and are aware of their own (and each other's) strengths and weaknesses. Members feel attached to the team as something "greater than the sum of its parts" and feel satisfaction in the team's effectiveness. Members feel confident in their individual abilities and those of their teammates.

Behaviors

Team members can prevent or solve problems in the team's process or in the team's progress. A "can do" attitude is visible as are offers to assist one another. Roles on the team may have become more fluid, with members taking on various roles and responsibilities as needed. Differences among members are appreciated and used to enhance the team's performance.

Team Tasks

In the Performing stage, the team makes significant progress towards its goals. Commitment to the team's mission is high and the competence of team members is also high. Team members should continue to deepen their knowledge and skills, including working to continuously improving team development. Accomplishments in team process or progress are measured and celebrated.

Is the "Performing" stage the end of the process?

While working on a high-performing team may be a truly pleasurable and mindful experience, it is not the end of team development. There is still a need for the team to focus on both process and product, setting new goals as appropriate. Changes, such as members coming or going or large-scale changes in the external environment, can lead a team to cycle back to an earlier stage. If these changes - and their resulting behaviors - are recognized and addressed directly, teams may successfully remain in the Performing stage indefinitely.

Stage 5: Termination/ Ending (or Adjourning)

Some teams do come to an end, when their work is completed or when the organization's needs change. While not part of Tuckman's original model, it is important for any team to pay attention to the end or termination process.

Feelings

Team members may feel a variety of concerns about the team's impending dissolution. They may be feeling some anxiety because of uncertainty about their individual role or future responsibilities.

They may feel sadness or a sense of loss about the changes coming to their team relationships. And at the same time, team members may feel a sense of deep satisfaction at the accomplishments of the team. Individual members might feel all of these things at the same time or may cycle through feelings of loss followed by feelings of satisfaction. Given these conflicting feelings, individual and team morale may rise or fall throughout the ending stage. It is highly likely that at any given moment individuals on the team will be experiencing different emotions about the team's ending.

Behaviors
During the Ending stage, some team members may become less focused on the team's tasks and their productivity may drop. Alternatively, some team members may find focusing on the task at hand is an effective response to their sadness or sense of loss. Their task productivity may increase.

Team Tasks
The team needs to acknowledge the upcoming transition and the variety of ways that individuals and the team may be feeling about the team's impending dissolution. During this stage, the team should focus on three tasks:
- o Completion of any deliverables and closure on any remaining teamwork
- o Evaluation of the team's process and product, with a particular focus on identifying "lessons learned" and passing these on to the sponsor for future teams to use
- o Creating a closing celebration that acknowledges the contributions of individuals and the accomplishments of the team and that formally ends this particular team's existence.

Virtual Learning Guidelines and Expectations
Didactic instruction at Hofstra University incorporates virtual learning (e.g., via Zoom). The COVID-19 global pandemic afforded the opportunity for universities and schools to mobilize faculty and students to utilize virtual learning in all types of classes. Since Zoom is used extensively in businesses and organizations worldwide, effective actions and behaviors to promote success have been recognized and suggested by various entities.

The Hofstra Northwell SON faculty is committed to using virtual learning technology as deemed appropriate so that students may benefit from their learning experiences as they would in a classroom setting. To enhance learning and promote a collegial, interactive, and respectful environment in using a technological modality such as Zoom, it is vitally important that faculty and students possess knowledge of its capabilities and usage, and support and encourage each other in this endeavor. Although students and faculty are not physically present with each other in a classroom setting, it is possible with the utilization of a virtual classroom to: "see" class participants' faces, listen, and speak to participants, write messages in a "chat" box, engage in "breakout rooms," and view images such as slides and videos etc.

To preserve the nature of the academic setting and appropriate classroom conduct and promote optimal learning, certain actions and behaviors must accompany participation in any virtual class. Please note and adhere to the following guidelines so that all students will thoroughly benefit from a virtual session.

General Guidelines for Students
- Complete all pre work as you would for any class session.
- Arrive early and ensure that you are set up and ready to begin at the class start time.

- Please type your first and last name in the chat box once you have logged in to ensure attendance recording.
- Plan to eat prior to (not during) class.
- Ensure your personal needs are taken care of prior to the beginning of class.
- Shut off/ disengage environmental alarms, sounds on electronic devices and other household distractions (e.g., grandfather clock that chimes every 15 minutes) and eliminate/minimize other deterrents as much as possible (including pets or other household distractions).
- Avoid engaging in sidebar conversations with others (who may be trying to communicate with you in your immediate locale).
- <u>Keep your video camera on at all times during the class</u> – the virtual learning room is to be considered synonymous to the environment of a campus classroom. Should you need to leave in an urgent situation, please privately text the faculty, utilizing the chat function.
- Keep yourself muted unless you are speaking (the host/ co-host - faculty or course coordinator may mute all participants – this helps eliminate background noise which can be very distracting and cause difficulty hearing for participants).
- Please do not engage in distracting behaviors/ habits (e.g., chewing gum, picking at nails, fixing hair).
- Stay focused and on track as to what is being said and use the chat box as indicated e.g., to ask questions, offer comments.
- Don't be afraid to speak, even in a large group class! Indicate that you would like to speak by unmuting or sending chat box message and don't hesitate to ask the faculty how they would like you to proceed in this regard.
- You must remain for the duration of the class until the host ends the session – **If you are not on video camera and/or do not respond to breakout invites or being called upon at any time during the class, <u>you will be considered absent from the session</u>.**

Dress Attire
Business casual is the attire required in the classroom. Appropriate dress code for school is required to maintain professional behaviors and is expected in the virtual environment as well. Please consider what you are wearing and how you look (since you will be visible!) to avoid any undue inappropriateness or potential embarrassment. Being dressed appropriately will also put you in the mindset of "school."

Background (physical environment)
Please try to secure a location where the natural (or artificial) light is in front of where you are sitting and not behind you as you will appear backlighted and be difficult to see.
Students are expected to use the pre-set Hofstra University background. Please be aware of what is behind you and minimize distracting backgrounds as much as possible.

<u>PLEASE NOTE FOR PEARLS SESSIONS:</u>
All PEARLS programmatic rules (i.e., non-negotiables as outlined in the PEARLS Student Handbook) apply to virtual as well as in-person sessions and students will be held accountable for upholding these.

Glossary

American Association of Colleges of Nursing (AACN) Essentials of Nursing (2021) – AACN Essentials Series delineates the national consensus by providing the elements and framework for building nursing curricula. The Essentials outline the necessary curriculum content and expected competencies of graduates from baccalaureate, master's, and Doctor of Nursing Practice programs, as well as the clinical support needed for the full spectrum of academic nursing. There are ten (10) domains; Domain 1: Knowledge for Nursing Practice, Domain 2: Person-Centered Care Descriptor; Domain 3: Population Health; Domain 4: Scholarship for Nursing Practice; Domain 5: Quality and Safety; Domain 6: Interprofessional Partnerships; Domain 7: Systems-Based Practice; Domain 8: Information and Healthcare Technologies; Domain 9: Professionalism; Domain 10: Personal, Professional, and Leadership Development

Bidirectional communication – student contributes ideas into the collective pool of ideas being shared and elicits information from both the pool of ideas and other students in the group.

Bloom's taxonomy – a classification system used to define varying levels of cognition, i.e., thinking, learning, and understanding. This hierarchical representation has the lower order learning (remembering, understanding and applying) at the bottom and the higher order learning (analyzing, evaluating and creating) at the top.

Case-based learning (CBL) and Problem-based learning (PBL) – are learner-centered educational pedagogies in which the learners are presented with a case/problem as a starting point for self-identification of learning needs, stated as formulated LO. The cases in CBL/PBL challenge learners to develop effective problem solving and higher order thinking (HOT) skills.

Consolidates knowledge of LO – student has progressed beyond searching for and reading evidence-based material, including practice guidelines, for group identified LO and has studied the material, processed the information to identify areas not well understood, filled knowledge gaps, related information to other LO being searched, and understands the material deeply enough to be able to teach the information to other group members.

Formative Assessment – a type of individual assignment that requires a particular student behavior, action or submission (written or oral) and results in faculty feedback as part of the learning process. This activity generally is generally not part of the formal grading system in a course and the feedback is not part of a quantitative assessment. Examples include practice skills with a standardized patient in the Clinical Skills Center, weekly essay reflection or practice quizzes with answer rationales.

Higher Order Thinking Skills – (referred to as HOTS) is progressive thinking to a higher cognitive level rather than just repeating or memorizing facts. HOTS requires using "critical, logical, reflective, metacognitive, and creative thinking" (King, Goodson, & Rohani, 1998, p.1), in this program, for addressing LO. Bloom's Revised Taxonomy (Anderson & Krathwohl, 2001) categorizes different levels of thinking. HOTS are similar to Bloom's Taxonomy's last three stages of highest levels of thinking: analyze, evaluate, and create.

Interprofessional Education Collaborative (IPEC) – interprofessional competencies include four domains including values and ethics, roles and responsibilities, interprofessional communication, and teams and teamwork.

Leader functions – includes but are not limited to: (a) setting an agenda, (b) refocusing the group on goal of the case as needed, (c) encouraging participation, and (d) ensuring the level of understanding prior to progressing further in the discussion. Advanced leadership skills include but are not limited to: (a) managing conflict, (b) ensuring discussion flows smoothly and effectively according to the agenda, and (c) fostering uniform participation and higher order discussion.

Learning Objectives – behavioral statements that describe what learning is to be achieved in relation to a particular subject or topic. In PEARLS students formulate their own learning objectives as part of the CBL/PBL pedagogy and then compare these to the faculty developed learning objectives for the case.

NONPF Competency – The National Organization of Nurse Practitioner Faculty (NONPF) has designated key critical competencies for all programs to ensure in their students. These abilities are knowledge, skills, and attitudes conducive to safe, effective quality-oriented practice.

Parking Lot – a list developed for any unfamiliar/unknown term and/or phrase or lack of knowledge/content that may have direct or indirect relevance to the subject under study. If the term or phrase is not initially directly involved in development of a LO, it is placed in the parking lot so it can be defined or investigated.

Pillars – help to achieve the goals of PEARLS. These three pillars consist of (a) CBL pedagogy; (b) group dynamics; and (c) higher order thinking.

Pre-work – readings and/or additional assignments that are to be completed prior to a formal class session.

Review and Reinforcement (R & R) – review of any concepts or learning material as deemed necessary by students or determined by faculty to require additional explanation or exploration. R&R sessions will be conducted by the faculty and/or content experts to address these deficiencies or gaps in knowledge.

Scribe functions – includes, but are not limited to, being responsible for: (a) writing (and editing, as warranted) the LOs developed by the group during the LO session, (b) maintaining the visibility of the LOs for the group members to see throughout the session (whether in classroom or virtual), (c) posting the LOs on Blackboard after group consensus is obtained, for group member access (including the facilitator), and (d) functioning as a group member during the LO session.

Summative Assessment – a type of individual assignment that quantitatively measures what the student has learned, for example, a mid-term or final examination grade that comprises or helps comprise the course formal grading criteria. Other examples of summative assessments include,

but are not limited to: clinical performance evaluation, and completion of assignments/quizzes with a passing grade.

Timekeeper functions – includes but are not limited to: (a) asking for group determination for verbal time announcements at desired set intervals, e.g., completion of each agenda item, (b) ensuring determination of allotted time for check-in and wrap-up by the group, (c) announcing the times to all group members, (d) collaborating with the group leader, and (e) functioning as group member in the session.

Triggers – represent a strategy or means to achieve higher order thinking and discussion; a trigger can be a question or scenario posed to the group (*but not a case study*) to synthesize thinking around a certain concept or situation. Triggers are developed in response to the group LOs and should delve deeper into the scientific mechanisms under study. Students will develop and enhance their HOT skills through the development and presentation of triggers to stimulate and engage in higher order discussion.

Unidirectional communication – student contributes ideas into the collective pool of ideas being shared

Appendices

Appendix A: Guidelines for SON/ZSOM Faculty Observation of PEARLS Sessions

To preserve group dynamics, kindly adhere to the following:

*PLEASE TURN ALL ELECTRONIC DEVICES <u>OFF</u> WHEN YOU ARRIVE AND DON'T LEAVE YOUR CELL PHONE OUT ON A TABLE/LEDGE. RINGING/ VIBRATING PHONES CREATE A DISTRACTION FOR THE STUDENTS!

- Sessions start promptly! Please arrive at least 10 minutes prior to the start of the session you are observing.

- Please take a seat in the periphery of the room; *do not sit at the table with group members.*

- Please understand the importance of your role as a silent observer in order not to disturb the group process. This includes refraining from talking, commenting, texting, emailing, and non-verbal gestures indicating what you are thinking.

- Please do not leave the room until the completion of the PEARLS session. Thank you!

PEARLS Session Facilitator Observation   **Date: _____**

Session: LO__   RO__   Facilitator Observed: _____   Faculty Observer: _____

* Please note that for any virtual PEARLS session, the Virtual Learning Guidelines and Expectations contained in both the PEARLS Faculty and Student Handbooks apply.

<u>**START OF SESSION**</u>
1. Does the facilitator set the tone for the learning session? (Behaviors to achieve this goal include sitting at the table with the team members, establishing rapport, providing clarification/responses as warranted, demonstrating approachable demeanor and upholding the ground rules).

_____

_____

<u>**DURING SESSION**</u>
2. How often does faculty facilitator use probing questions (including why)? Is the timing appropriate? Were opportunities missed for probing questions?

_____

_____

3. Does the faculty facilitator exhibit model behavior? (Examples include neutral facial expression, active listening, appropriate body language and fully engaged in the session).

_____

_____

4. Does the faculty facilitator uphold the ground rules set for facilitator/ team members? (Examples include demonstrating respect for members/ assigned roles, taking appropriate notes)

_____

_____

WRAP-UP

5. Is the wrap-up framing question clear, concise and related to the PEARLS pillars and school's mission, vision and values? Is it capable of eliciting thought provoking, analytic responses?

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6. Does the faculty facilitator model expectations of the school's mission, vision and values through exemplary behaviors i.e., demonstrated during the self and group assessments?

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7. Did the faculty facilitator track/comment on any action plans from the prior session regarding self and/or group improvement plan/strategies?

POST SESSION

Written and verbal feedback should be provided to the facilitator with an opportunity to discuss feedback and recommendations as soon as possible after the session.

A copy of the facilitator evaluation form should be sent to Dr. Anthony Porcelli, Senior Assistant Dean for Operations and Strategy for placement in the facilitator's file.

HOFSTRA NORTHWELL
SCHOOL *of* **NURSING**
AND
PHYSICIAN ASSISTANT STUDIES

Faculty Facilitator Orientation
to the Patient-Centered Explorations in
Active Reasoning, Learning and Synthesis
(**PEARLS**) Pedagogy

February 2017 (Reviewed/Updated June 2024)

Faculty Orientation to the Role of a PEARLS (<u>P</u>atient-centered <u>E</u>xplorations in <u>A</u>ctive <u>R</u>easoning, <u>L</u>earning, and <u>S</u>ynthesis) Facilitator

In addition to orientation as a faculty member of the Hofstra Northwell School of Nursing (SON), a specific orientation is required for those faculty members engaged as PEARLS session facilitators. An orientation will be provided to all faculty including facilitators, observers, and visiting faculty e.g., clinical preceptors. This orientation begins prior to the Fall and Spring semester in which the facilitator will be a participant. The orientation process is ongoing as facilitator development is a vital aspect of this pedagogy and continues with formal and informal sessions conducted in collaboration with the Donald and Barbara Zucker School of Medicine at Hofstra/Northwell (ZSOM) and with the SON faculty.

<u>Overview</u>
Orientation as a PEARLS facilitator is viewed as a continuous process, involving a collaborative partnership with colleagues in the SOM and engagement in ongoing, interprofessional Faculty Development programs and related peer review activities.

Since its inception, the SON has adopted a "flipped classroom" approach and embraced PEARLS as an important pedagogy in its required advanced physical science courses, including Advanced Pathophysiology, Advanced Pharmacology. Adaptations from the ZSOM PEARLS curriculum have been modified to suit the learning objectives and needs of the SON graduate students.

PEARLS pedagogy is based on adult learning concepts and uses a hybrid of case-based/problem-based learning scenarios developed by the faculty that emulate how patients with disease conditions may present. Small student groups (approximately 6-10 in each) independently develop their own learning objectives from this case presentation in the presence of a faculty facilitator in a designated learning objective (LO) development session. A different case study is presented in correlation with the weekly course theme/topic that directly relates to the course curriculum. PEARLS pedagogy stipulates that the major responsibility for learning lies with each student i.e., self-exploration to glean the information to fulfill accomplishment of the LOs developed by each PEARLS group. This information is shared and discussed in the small groups in report out (RO) sessions with the faculty facilitator with the goal of higher order learning and discussion fostered by the use of triggers. Triggers are student generated ideas often posed as questions to foster higher order discussion and are explained in both the PEARLS Faculty and Student Handbooks, as well as course materials.

<u>Role and Responsibilities</u>
The primary responsibility of a PEARLS facilitator is focused on the process of achieving higher order learning. Attendance at both the LO and RO sessions with their designated group serves the purpose of monitoring student and group's progress. A key feature in every session is that the faculty facilitator is primarily concerned with all aspects of the *process* rather than the didactics, and hence does *not* provide or offer *any* content related to the subject under study. The faculty facilitator is considered a member of the PEARLS group and expected to remain actively and fully engaged in every session. Attentive listening, providing thoughtful comments such as interrogative remarks or reflective comments, whenever deemed necessary throughout the session are integral activities of the facilitator.

Additional responsibilities of faculty facilitators include: reviewing required course assignments and other formative activities related to the relevant course(s) and providing 1:1 assessments with each student in their group at least twice a semester (or more often as deemed necessary).

The PEARLS pedagogy and its process, objectives and details of the group structure and methods, as well as the faculty facilitator's expectations, responsibilities and functions are further delineated in both the PEARLS Faculty and PEARLS Student Handbooks. Faculty facilitators should continually review and be knowledgeable about the content in both handbooks.

Orientation Sequence for a SON Faculty Facilitator to the PEARLS pedagogy consists of:
- Receipt and review of the SON PEARLS Faculty PEARLS and PEARLS Student Handbooks (with signed attestations maintained in the faculty member's file)
- Attendance at the SON (as an observer) for a minimum of *two* PEARLS sessions (i.e., 2 cases with LO development and RO sessions) with assigned SON PEARLS facilitator is required
- Additional observation sessions at SOM is available upon request
- Attendance at a SON PEARLS session (as observer), as assigned
- Use of Zoom (as an alternative PEARLS attendance strategy for students)
- Attendance at a PEARLS SON Faculty Orientation session (with SON Facilitators)
- Review of relevant course syllabi (available in Canvas)
- Provision of access to textbook materials and Evolve Elsevier assignments
- Provision of access to Canvas
- Facilitation of PEARLS session(s) with group (with designated SON observer who will provide feedback)
- Continuation of periodic ongoing observation by experienced SON faculty observer (with provision of feedback)
- Faculty Development courses are offered on a continual basis. SON faculty facilitators are encouraged to participate for knowledge acquisition and skill enhancement.

PEARLS Observations at the SON/SOM
Prior to an assignment as a PEARLS faculty facilitator, observation of a SON PEARLS facilitator is required for a minimum of two complete sessions. Additional opportunities to observe during PEARLS sessions at the ZSOM with Dr. Elkowitz (or another ZSOM faculty) is available. Scheduling is coordinated directly with the ZSOM (administrative staff for Dr. Elkowitz). Scheduling at SON will be facilitated by lead faculty for the course. The purpose is to gain knowledge and understanding from observation of the group process, specifically regarding the role and function of the faculty facilitator. It is very important to know why, when, and how the facilitator should intercede and the best method to do so to achieve the goals of PEARLS. The intervention may be in the form of a probing question to help students achieve higher order learning or it may be a reflective comment to guide the group back on track. Additional observations at the SON or ZSOM with different PEARLS groups are of great benefit to recognize the various and appropriate types of verbal involvements/interventions that may be necessary.

PEARLS Faculty Handbook and PEARLS Student Handbook

A copy of both handbooks is provided and available on Canvas. Following review of these materials, faculty facilitators will sign an attestation. Familiarity with both handbooks is integral prior to assuming the role and responsibilities of a faculty facilitator. Any updates will be reviewed at the course(s) orientation for students and faculty.

Course Syllabi
The applicable course syllabi including all the related documents are available on Canvas and reviewed during course orientation at the beginning of the semester. The PEARLS pedagogy is included in the relevant course syllabi and accounts for a percentage of the course grade.

During the initial Orientation for beginning students (with Faculty present) the PEARLS pedagogy is discussed and demonstrated. This provides an opportunity for both students and faculty to raise questions, clarify concerns and issues related to the process and methods of PEARLS prior to their first course session.

Canvas
Canvas is the university web site application for internal resources including course materials, assignment submissions and grading. Required PEARLS assignments may be submitted through Canvas. Faculty facilitators will be oriented to the use of Canvas by a Course Coordinator through a hands-on approach; a tutorial is also available.

Additional course materials and assignments for PEARLS are available through Evolve and the Course Coordinator will provide the access and download.

Use of Zoom
When physical presence at a PEARLS session is not permitted or feasible due to extenuating circumstances such as a global pandemic, virtual attendance is accomplished through the use of web conferencing e.g., Zoom through Canvas
The designation of virtual sessions will be determined by SON in accordance with Hofstra's guidelines and policies (as outlined on page 1) Facilitators can review Zoom tutorials available through Hofstra and will be given hands-on assistance and explanation by one of the course coordinators on the use and features to conduct a session prior to course initiation. A tutorial is available through the Faculty Computing Services.

SON PEARLS Orientation Session
A specific orientation session is dedicated and conducted for novice facilitators by the SON faculty facilitators (prior to the beginning of the semester). It is strongly encouraged that the PEARLS Handbooks be read *prior* to this session to foster an in-depth discussion and understanding of examples and techniques that may be useful. This session should be attended *in person, if possible.*
*All the above activities *must* occur prior to facilitating a PEARLS session!

Facilitation of PEARLS session(s) with group (with designated SON faculty observer who will provide feedback)
During an initial (or subsequent) PEARLS session a SON faculty member will be present during the session as an observer to observe the group process and facilitator interaction. The observer does not sit directly with the group and does not offer any comments during the duration of the

session. A standardized checklist is used for this purpose. Students should be apprised that the observation is being done mainly for educational purposes and to ensure uniformity of the process. *Please see Appendix A: Guidelines for SON/SOM Faculty Observation of PEARLS Sessions and Appendix B: SON PEARLS Facilitator Observation Evaluation Form* in the PEARLS Faculty Handbook.

Faculty Development

Faculty development is recognized by the Dean and Faculty of the SON as an integral and vital component of the program's mission and vision of excellence. Therefore, in a collaborative and collegial partnership, faculty development is conducted in an interprofessional manner with the SOM faculty and occurs in informal and formal sessions. Ongoing faculty development sessions are conducted with faculty to enhance faculty expertise and skills in PEARLS. Additionally, SON and SOM faculty members participate as observers in SON PEARLS sessions and provide written and verbal feedback to facilitators. This process also enables ongoing improvement and skill development and enhancement.

SON Faculty Facilitator Checklist (This completed document must be submitted to the Senior Assistant Dean)

Facilitator's Name:

Items	Yes	No	Date(s)	Comments
I have received the PEARLS *Faculty Facilitator Handbook* and signed the attestation statement				
I have received the PEARLS *Student Handbook* and signed the attestation statement				
I have attended a minimum of 2 SON/ PEARLS case sessions				
I have received and reviewed the relevant course syllabi for PEARLS				
I have received an orientation and necessary information to access and use Canvas				
I have received an orientation and necessary information to access and use Zoom				
I have attended the SON Orientation session for new PEARLS faculty				
I have received an orientation and necessary information to access and use library resources and Elsevier evolve				

Facilitator's Signature: **Date:**

Appendix D: Guideline for PEARLS 1:1 Assessment Topics

Date: / / **Facilitator:** _____ **Student:**
_____

Areas of Inquiry to Assess Performance and/or Progress:
- How do you think you're performing in the PEARLS group?
- How have you allotted your time? e.g., choice of evidence-based sources, text readings/ videos, use of study groups
- What has been your biggest obstacle/ barrier in this learning style?
- What has been most positive for you in this learning style?
- Describe your strengths/ strategies used in preparation for report out…
- How have your study/ learning abilities been changed, enhanced or stultified?
- Are you aware of Hofstra University resources available to assist you? e.g., faculty, library, writing center, counseling service
- Review performance during PEARLS (include discussion of role performance as leader, timekeeper, scribe, and group member)
- How can I, as the facilitator, assist you in achieving expectations? e.g., participate more substantively, use higher order thinking discussion and triggers more effectively

Action Plan for Improvement: (i.e., areas to concentrate on)
Student describes…

Comments:
Student:

Facilitator:

The SON PEARLS Process: Evaluation and Documentation of Learning Objective (LO), Report Out and One-to-One Assessment Sessions

In order to achieve the goals of PEARLS, meet course objectives, account for individual student's learning needs, and ensure uniform evaluation of progression through the PEARLS process, the SOGN faculty developed a standardized approach for facilitators to guide and evaluate students in the course(s) using the PEARLS pedagogy. Expectations for students will be reviewed at Orientation, the initial PEARLS session, and reinforced throughout the semester by the facilitator.

Learning Objective (LO) and Report Out (RO) Sessions:
Faculty facilitators are responsible for assessing each student's performance during every LO and Report Out session. Notes may be taken by the facilitator to assist with this task. Note taking is accomplished discreetly with pen and paper as deemed necessary so as not to disrupt the flow of the session. A performance evaluation template for each session has been developed to aid the facilitator in tracking.

One-to-One Assessments
An evaluation of each student's progress in the PEARLS sessions is conducted by the facilitator with each student in the group during the 1:1 assessment meeting conducted at least twice during the semester. Additional meeting sessions may be required during the semester and scheduled at the discretion of the facilitator with the student. The interactive discussion and main points are documented, shared, and acknowledged by the facilitator and the student. The purpose is to assess progression towards successfully meeting the performance criteria and an action plan developed. A format guide (which may also be used for documentation purposes) describes salient aspects of this 1:1 process and is included as *Appendix D: Guideline for PEARLS 1:1 Assessment Topics* in the Faculty PEARLS Handbook. This guide may be used to direct the dialogue which includes the student's strengths and areas for improvement with an action plan. Consensus should be reached between the facilitator and the student on the areas for improvement and strategies that can be used to accomplish these. Records of 1:1 meeting sessions are maintained in the student's file.
The following statements describe the process for the assessment of students and the documentation thereof:
   – Maintain a case # file folder with the case, student developed LOs, notes by the facilitator of the LO and Report out sessions, and LO comparison.
   – Maintain student file folders for facilitator notes of student performance and 1:1 assessments (also maintained electronically).
   – Student folders are maintained securely by the facilitator and electronic assessments maintained on a confidential server.
   – LO and Report Out session templates to aid in note-taking by the facilitator are not part of the student's file and should *only* be used for the transfer of information to the rubric used in grading.
   – Provide a follow-up written summary of the 1:1 meeting to the student who must provide an acknowledgment. This documentation should be maintained in the student's permanent file.
   – The final 1:1 assessment documentation should reflect the terminal status of the student's action plan implementation.

Patient-centered Explorations in Active Reasoning, Learning, and Synthesis (PEARLS) – 15% of final grade

Each small group facilitator will assess the performances of students within his/her PEARLS groups using a criterion-referenced standard for performance. Each student is referred to the PEARLS Student Handbook for the Nurse Practitioner Programs ("Student Handbook") for greater detail on the goals, policies, procedures, and processes for PEARLS (including student assessment). Each student is expected to completely review the Student Handbook prior to the start of the course. Throughout the semester, each student is encouraged to reread the Student Handbook to guide one's reflection and self-assessment of his or her PEARLS performance and overall professional development.

The PEARLS Grade is 15% of courses which utilize PEARLS as a learning modality:
- Fall Semester – NUR 201
- Spring Semester – NUR 203

Faculty Responsibility

As a PEARLS Facilitator you are responsible for the accurate and timely grading of the performance of your assigned PEARLS students. Students that are underperforming must be placed on a Learning Contract (See Appendix G) no less than 1 week after midterm grades are posted.

PEARLS GRADING CRITERIA
PEARLS students who participate fully, come prepared with triggers, perform roles without prompting, and abide by non-negotiables will be given full credit. Students will earn a demerit for the following actions:

- Excessive lateness – Defined as more than 1 lateness per semester
- Excessive absences - Defined as more than 1 absence/early dismissal per semester.
- Lack of participation – More than 1 instance
- Missing Trigger – 1 instance or more
- Usage of cell phones during PEARLS – 1 instance or more
- Lacking a commitment towards academic excellence – defined as not being prepared to engage in conversation. Students admits they did not study/are not prepared. Displaying severe knowledge deficit.
- Consistent breaking of non-negotiables
- Poor execution of roles, requiring constant prompts/reminders while having a role – after 4th week of fall semester
- Unprofessionalism/Other non-negotiable behaviors as described in the PEARLS Student Handbook

If a student is not performing in PEARLS, this will be communicated to the individual student during their 1:1 meeting in writing, but it will also be conveyed towards the entire group verbally during wrap-up questions. Students who consistently display non-negotiable behaviors will not receive full credit for PEARLS.

Grade Matrix

Grading Criteria (# of instances met)	Grade	Requires Learning Contract?
0	100	No
1	95	No
2	90	Yes
3	85	Yes
4	80	Yes
5	75	Yes
6	70	Yes
7	65	Yes
8+	0	Yes and a meeting with Program Director

Each student will have two PEARLS 1:1 Meetings throughout the semester with their PEARLS faculty facilitator. The 1:1 Meeting schedule will proceed as per the following:

Date Range	1:1 Type	Description
4th to 6th week of semester	First 1:1 Meeting	Mandatory meeting for all students. Requires online Qualtrics form to be completed by both faculty and student
Post Midterm	Midterm Exam Performance Meeting	Lead Faculty discretion. Meeting with Lead Faculty and/or Program Track Director (FNP/AGACNP/PMH)
10th to 11th week of semester	Second 1:1 Meeting	Mandatory meeting for all students. Requires online Qualtrics form to be completed by both faculty and student
Entire Semester	Optional 1:1 Meetings	Upon request of student or per Facilitator discretion.

Hofstra Northwell
School of Nursing & Physician Assistant Studies

LEARNING CONTRACT FOR ACADEMIC IMPROVEMENT

Student Name:
Course Name:
Midterm Examination Score:

Program Track:

Date:

This Learning Contract is instituted due to concerns regarding your academic performance as evidenced by a midterm examination score of less than 83% in the above titled course. This score falls below the minimum passing grade for the course, signifying a critical need for immediate and effective action to address deficiencies in knowledge and study practices.

The Hofstra Northwell School of Nursing and Physician Assistant Studies DNP program is committed to the pedagogy of self-directed learning, which requires you to take full responsibility for your educational outcomes. This approach emphasizes the importance of your initiative and engagement in learning activities, making use of available resources, and continually assessing your own understanding and performance.

Your performance indicates a discrepancy between the expected competency level and your current understanding as demonstrated by the midterm score of _____. This gap suggests that the study methods and efforts employed thus far have been insufficient and possibly misaligned with the academic demands of the course.

To rectify this situation, it is essential that you undertake the following measures:

1. **Strategic Study Planning:** Develop a detailed study plan that includes specific goals, timelines, and resources. This plan should be reviewed and approved by your academic advisor and updated regularly to reflect progress and any adjustments needed.
2. **Enhanced Academic Engagement:** Commit to deepening your engagement with all course materials. This includes not only required readings and assignments but also supplementary resources that extend beyond the curriculum.
3. **Regular Consultations:** Engage in regular consultations with faculty members to gain insights into your academic performance, receive personalized feedback, and discuss

complex topics or any areas of uncertain.

4. **Participation and Collaboration:** Increase your participation in class and utilize collaboration opportunities such as study groups and peer discussions to enhance your learning and expose you to diverse perspectives and problem-solving approaches.
5. **Utilization of Academic Support Services:** Take full advantage of Hofstra University's academic support services, including tutoring centers, writing help desks, and library staff, to help bridge the knowledge gap and improve skills related to the course.

Your adherence to this contract will be monitored through periodic progress reviews with your academic advisor. These sessions will focus on evaluating the effectiveness of implemented strategies and making necessary adjustments to the plan.

Failure to comply with the terms of this contract and show tangible improvement in academic performance may result in failing the course. Such an outcome could have further implications on your status within the DNP program, including potential impacts on your future academic and professional opportunities.

By signing this contract, you commit to upholding the highest standards of academic integrity and to strive for excellence in your studies. You acknowledge the seriousness of your current academic standing and express your commitment to taking proactive steps to achieve the required performance level.

Student Signature: _____ **Date:** _____

Faculty Advisor Signature: _____ **Date:** _____

Lead PEARLS Faculty: _____ **Date:** _____

CC: Dr. Renee Mcleod-Sordjan, Dean

       Dr. Anthony Porcelli, Senior Assistant Dean

       Dr. Treesa Scaria, Chair

       Dr. Amy Smith, FNP Program Director

       Dr. Stefanie Keating, AGACNP Program Director

       Dr. Patricia Janson, PMH Program Director

       Dr. Patricia Sarcona, SAC Chair

Hofstra Northwell

School of Nursing & Physician Assistant Studies

LEARNING CONTRACT FOR PEARLS IMPROVEMENT

Student Name:
Course Name:

This Learning Contract is being instituted due to significant concerns regarding your professional conduct and academic engagement, impacting your performance in the PEARLS component of the course, which constitutes 15% of your final grade. This behavior can critically affect your overall course grade, potentially being the defining factor between passing and failing.

The behaviors of concern are as follows (please check as applicable):

[ ] Excessive Lateness: More than one occurrence per semester.
[ ] Excessive Absences/Early Dismissals: More than one occurrence per semester.
[ ] Lack of Participation: More than one instance of non-participation in required activities.
[ ] Missing Trigger: Failure to respond to or acknowledge critical learning cues at least once.
[ ] Usage of Cell Phones during PEARLS: Any instance of using cell phones during sessions.
[ ] Lack of Commitment Towards Academic Excellence: Not being adequately prepared for discussions or sessions, admitting to not studying, or displaying severe knowledge deficits.
[ ] Consistent Breaking of Non-negotiables: Repeated violations of established classroom and program rules.
[ ] Poor Execution of Roles: Needing constant prompts or reminders to perform assigned roles after the 4th week of the fall semester.
[ ] Unprofessionalism: Engaging in behaviors deemed unprofessional as per the PEARLS Student Handbook.

The Hofstra Northwell School of Nursing and Physician Assistant Studies DNP program is committed to the pedagogy of self-directed learning, which requires you to take full responsibility for your educational outcomes. This approach emphasizes the importance of your initiative and engagement in learning activities, making use of available resources, and continually assessing your own understanding and performance.

To address these issues, you are required to undertake the following measures:

1. **Punctuality and Attendance:** Develop and adhere to a schedule that ensures timely attendance and full participation in all required sessions.
2. **Active Participation:** Engage actively in all learning activities and discussions. Prepare a list

of contributions you can make to each session and follow through.
3. **Preparation for Engagement:** Allocate sufficient time daily to study and prepare for upcoming sessions, ensuring you are well-prepared to engage in academic discourse.
4. **Professional Conduct:** Review the PEARLS Student Handbook thoroughly and commit to adhering to all professional standards outlined within.
5. **Utilization of Support Services:** Make use of academic support services provided by the university, such as tutoring centers, academic advisors, and counseling services, to enhance your learning strategies and professional conduct.

Failure to comply with the terms of this contract and demonstrate tangible improvement in professional conduct and academic engagement may lead to serious consequences, including the potential of failing the course and implications for your future academic and professional endeavors.

By signing this contract, you acknowledge the seriousness of your current academic standing and commit to taking proactive steps to meet and exceed the required performance and professional standards.

Student Signature: _____ **Date:** _____

Faculty Advisor Signature: _____ **Date:** _____

Lead PEARLS Faculty: _____ **Date:** _____

CC: Dr. Renee Mcleod-Sordjan, Dean

Dr. Anthony Porcelli, Senior Assistant Dean

Dr. Treesa Scaria, Chair

Dr. Amy Smith, FNP Program Director

Dr. Stefanie Keating, AGACNP Program Director

Dr. Patricia Janson, PMH Program Director

Dr. Patricia Sarcona, SAC Chair

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