The Art of Client Teaching

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Brief bio

- Occupational therapist, The Ottawa Hospital
- 30+ years working in acute mental health
- Author: Coping Strategies to Promote Mental Health
- Co-author: Coping Strategies to Promote Occupational Engagement and Recovery
- Diploma in Adult Education (STFX, 2016)
- Member of CAOT Suicide Prevention Network

Presenter disclosure

Presenter: Theresa Straathof

Relationships with commercial interests:

- **Author of manual: Coping Strategies to Promote Mental Health (Straathof, 2022)**
- **Co-author of manual: Coping Strategies to Promote Occupational Engagement and Recovery (McNamara & Straathof, 2017)**
- **Royalties received from sales of these manuals**

MITIGATING POTENTIAL BIAS

- Material used throughout the presentation is from Straathof (2022) and McNamara & Straathof (2017)

Introduction

Learning objectives

1. Describe the stages of Kolb's Adult Learning Model (ALM) (2014)
2. Construct a learning session using Kolb's ALM
3. Adapt ALM delivery method for aphasia

Constructing a learning session (STFX, 2016)

Step 1: Identify learning need/gap

Step 2: Define the learning objective

Step 3: Organize handouts and materials

Step 4: Consider relevance to the learner's real-life situation

Step 5: Clarify the agenda, time frames, learning objective

Step 6: Develop the learning cycle (Kolb's ALM)

Step 7: Determine evaluation of the learning objective

Identify general goals based on learning need or gap

- Possible learning need categories for stroke care:
  - Managing ADL routine, IADLs
  - Communication
  - Safety (mobility, transfers, meds, suicide prevention, etc.)
  - Support (personal, peer, professional)

Question: Learning objectives

What do you like/not like about the following learning objectives?

The client will:

- Name two community resources
- Commit to follow up with one community resource

Learning objective template (STFX, 2016)

- **Condition:** What learning activities/processes/resources are needed?
- **Performance statement:** What must the learner know, do or commit to doing? (know it, show it, own it)
- **Standards:** How well must the learner know, do or commit to doing it? How good is good enough?
- **Evaluators:** Who will decide whether the standards have been met?

Examples of performance statements

- **Domains of learning according to Bloom's Taxonomy:**
  - **K**nowledge (Cognitive domain) – mental skills and the acquisition of knowledge
    - *Client will **name** values for a healthy blood pressure reading*
  - **S**kill (Psychomotor domain) – use of motor skills
    - *Client will **demonstrate** a safe transfer*
  - **A**ttitudes (Affective domain) – Involves emotions, attitudes, values, and feelings
    - *Client will **commit** to attending a communications workshop*

Quiz: Knowledge, skill or affect domain?

Question #1: The caregiver will **perform** passive range of motion exercises for left upper extremity of the client _____

Question #2: The staff will **name** two strategies to use with clients experiencing aphasia _____

Question #3: The client will **choose** a professional or peer support to follow with on discharge _____

Verbs for performance statements

Knowledge (Recall and abstraction of concepts)	Skill (Physical skills)	Affect (Attitude shifts)
• Explain • Recall • Define • Identify • Compose • Compare, contrast • Analyze, etc.	• Demonstrate • Operate • Perform • Produce • Fill • Assemble • Construct, etc.	• Value • Choose • Commit to • Accept • Respect, etc.

Learning objective: Peer support resources

- **Condition**: Given review of March of Dimes website and Heart and Stroke foundation website, practice, discussion and feedback
- **Performance statement**: The learner will commit to connecting to a support program
- **Standard**: To the extent that contact information is submitted, and a method of accessing the support is identified
- **Evaluator(s)**: As evaluated by client/facilitator/carer

Provide relevance and agenda

- Adult learners are interested in learning that has immediate personal relevance and impact
- Adults like to know what will happen in a session and how they will be evaluated in their learning (Knowles, 1989)

Kolb's Adult Learning Model (ALM), 2014

1. Concrete Learning (Experience)
   - Doing/having an experience - captures attention, generates information
2. Reflective Observation (Reflection)
   - Reflect on the experience, recall/react/recognition
3. Abstract Conceptualization (Generalization)
   - Analyze information, make connections, draw conclusions, consider implications, find significance
4. Active Experimentation (Application)
   - Test conclusions, try out what was learned, plan to use concepts in personal life

ALM Stage 1: Concrete learning (Experience)

- The learner engages in an experience that captures the learner's attention and generates information
- The experience creates a learning opportunity that learners can connect with (new information or similar information under new circumstance)

Activities that provide an experience

- The learner will:
  - Do a task
  - Read information
  - Watch a demonstration
  - Play a game
  - Listen to a story, etc.

ALM Stage 2: Reflective observation (Reflection)

- The learner reflects on what they observed by:
  - **Recalling** information from the experience
  - **Recognizing** information from the experience
  - Expressing their **reaction** to the experience
- The learner makes links to existing knowledge

Reflection questions and activities

Reflection Questions	Reflection Activities
What part of this information is familiar to you? How would you describe this in your own words? What stood out for you? How does this information make you feel? What is the correct sequence of the information provided?	Sorting task Mixing/matching exercise Filling in the blanks Explaining the experience to a partner Drawing/choosing a picture to summarize responses to the experience

ALM Stage 3. Abstract conceptualization (Generalization)

- The learner will:
  - Analyze information, make connections, draw conclusions, consider implications, find significance
  - Generate new or modified ideas
  - Consider benefits, challenges, solutions

Generalization questions and activities

Generalization Questions	Generalization Activities
What conclusions can we draw from that? Why? What are the pros and cons of this option/approach? Why? What barriers can you anticipate and what solutions could you suggest? Why? (Adding the question “why” encourages deeper thinking)	Choosing pictures to indicate how information might help or options for sharing information Describing the effect a given change would have if implemented Comparing new learning with current practice and debating the merits of its use

ALM Stage 4: Active experimentation (Application)

- The learner will:
  - Test conclusions, try out new learning or plan to use concepts in personal life
  - Practice new technique or part of technique
  - Consolidate information

Application questions and activities

Application Questions	Application Activities
How can you apply this learning? What is one thing you will do differently now? What is your next step from here? What support or resources do you need to implement this?	Role play Complete a skills trial Write out a plan to use the information

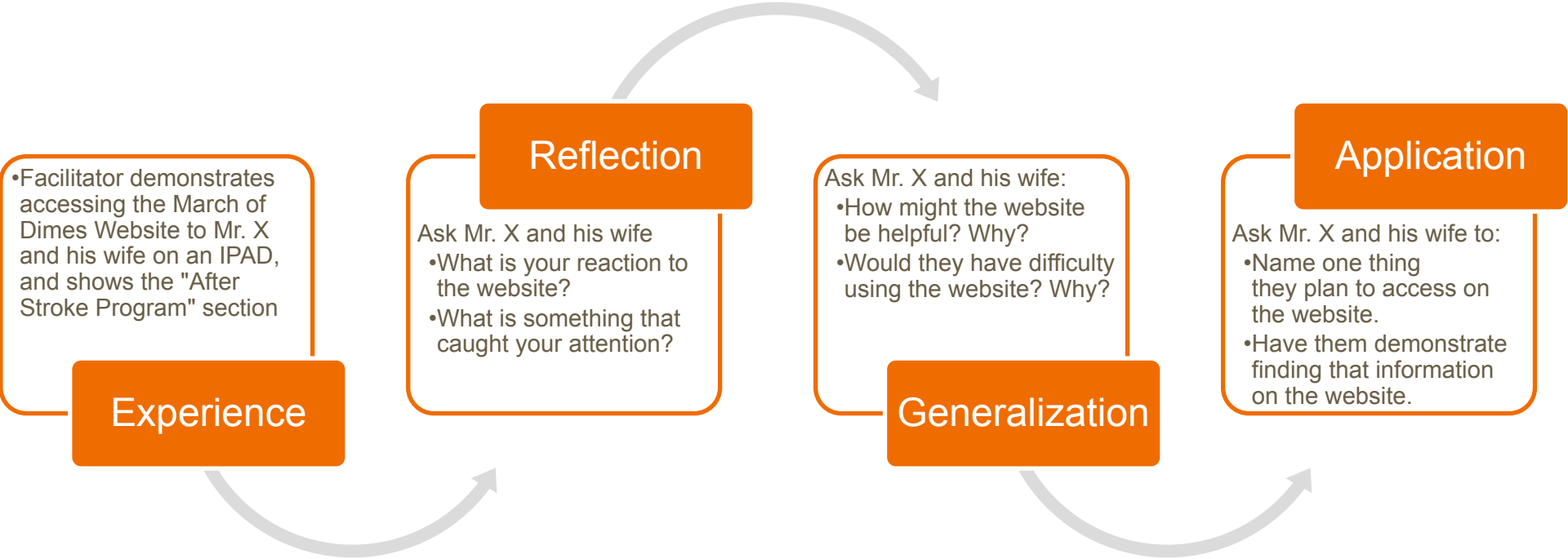
Case scenario: Mr. X

- Mr. X is a 72-year-old male who has a right middle cerebral artery (MCA) stroke.
- He and his wife express feeling stress related to his illness, compounded by having limited supports.
- They may benefit from accessing information on stroke and peer support resources

State relevance and agenda

- Relevance for connecting with peer support resources: *Peer support can provide hope and practical advice through shared experience. It can help people regain confidence and promote recovery*
- Agenda: *We will look at two websites outlining resources and programs, discuss your likes and possible benefits, and access one of the programs*

Kolb's ALM: Committing to a community support program



Evaluation: Peer support resources

- Mr. X commits to using his personal IPAD to register for a support program offered through the March of Dimes website

Kolb's ALM (2014): Reflection exercise

- Which is the correct sequence of the 4 stages of Kolb's ALM?

A. Explanation, recall, generalization, acceptance

B. Excitement, application, reflection, goals,

C. Experience, reflection, generalization, application

Risks to completing only partial steps of Kolb's ALM

1. Example: Tell them about the website then ask if they have any questions (Experience to reflection only)
   Risk: Does not demonstrate the learner's ability to apply knowledge

1. Example: Show website then practice accessing website (Experience to application)
   Risk: Demonstrates the learner's ability to imitate only, may cause frustration with repeated errors in trial and error

1. Example: Skipping the generalization component
   Risk: You may miss an opportunity to assist with finding a solution to a client's challenge in implementing the new behaviour

Why is Kolb's ALM effective in stroke care?

- Kolb's model fits with findings that education for clients with cognitive impairment should be evidence-based, goal-oriented, individually tailored, collaborative, facilitate shared decision-making, active participation and can be presented in different formats (written, oral, pictorial) (D'Cruz, 2021; STFX, 2016)
- These characteristics for learning are also supported by the Canadian Stroke Best Practice Guidelines (2019)
- Literature reviews indicate Kolb's experiential problem-based learning is an effective method for increasing knowledge of health management, empowering clients and changing behaviours. Most studies to date have been conducted in areas of chronic physical disease and disease prevention (McNamara & Straathof, 2017).

Making your plan

What is one thing you will add to your teaching method based on Kolb's ALM?

- Reflection question or activity
- Generalization question or activity including discussing the benefits or challenges of implementing the new learning
- Application - practice or making a plan to use the new learning

Briefly describe each stage (experience, reflection, generalization and application) in your own words

Learning objective 1: Met

Describe Kolb's ALM stages:

1. Experience: Something happens, taps into the senses; Sensory experience
2. Reflection: Recall, react, recognize what happened
3. Generalization: Draw conclusions, answer the "why"
4. Application: Plan to use the information or practice what was learned

Let's put it together

- Step 1: Needs assessment: Client is new to taking regular medications. You will teach your client 2 strategies to assist with medication adherence

- Describe how you could apply the 4 stages in Kolb's ALM:
  - Experience
  - Reflection
  - Generalization
  - Application

2. Learning objective: Med adherence

- Condition: Given review of handouts, discussion and feedback,
- Performance: The client will commit to medication adherence,
- Standard: To the extent that 3 strategies are named, and a plan is made to implement one strategy today,
- Evaluator(s): As evaluated by client, facilitator and carer

3. Organize handouts/materials

- Organize materials and resources in advance including
  - Supplies to be used by the facilitator
  - Handouts and other materials that will be used by the learner

4. Consider relevance

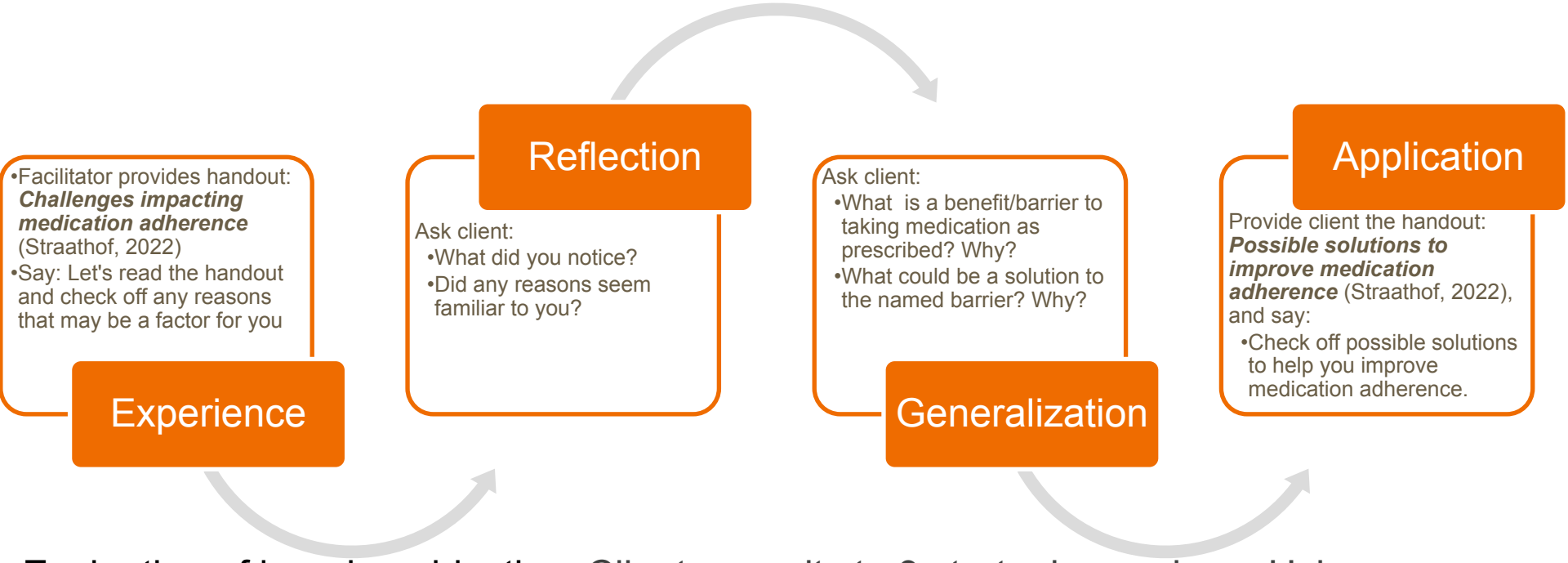
- Adult learners are interested in learning that has immediate personal relevance and impact (Knowles, 1989)
- Example of relevance for learning medication adherence strategies:
  - *An important part of recovery is taking medication as prescribed. There can be many barriers in doing so. Risks of not taking medications as prescribed may include further illness, injury or hospitalization*

5. Clarify the agenda

- Clarify the agenda, time frame, and learning objective
- As partners in learning, adults like to know:
  - What is going to happen during the session
  - How long the session will be
  - How their learning will be evaluated

(Knowles, 1989)

6. Kolb's ALM: Medication adherence



Evaluation of learning objective: Client commits to 3 strategies such as: Using a blister pack, placing an alarm on phone (completes in session) and arranging for pharmacy to deliver medication

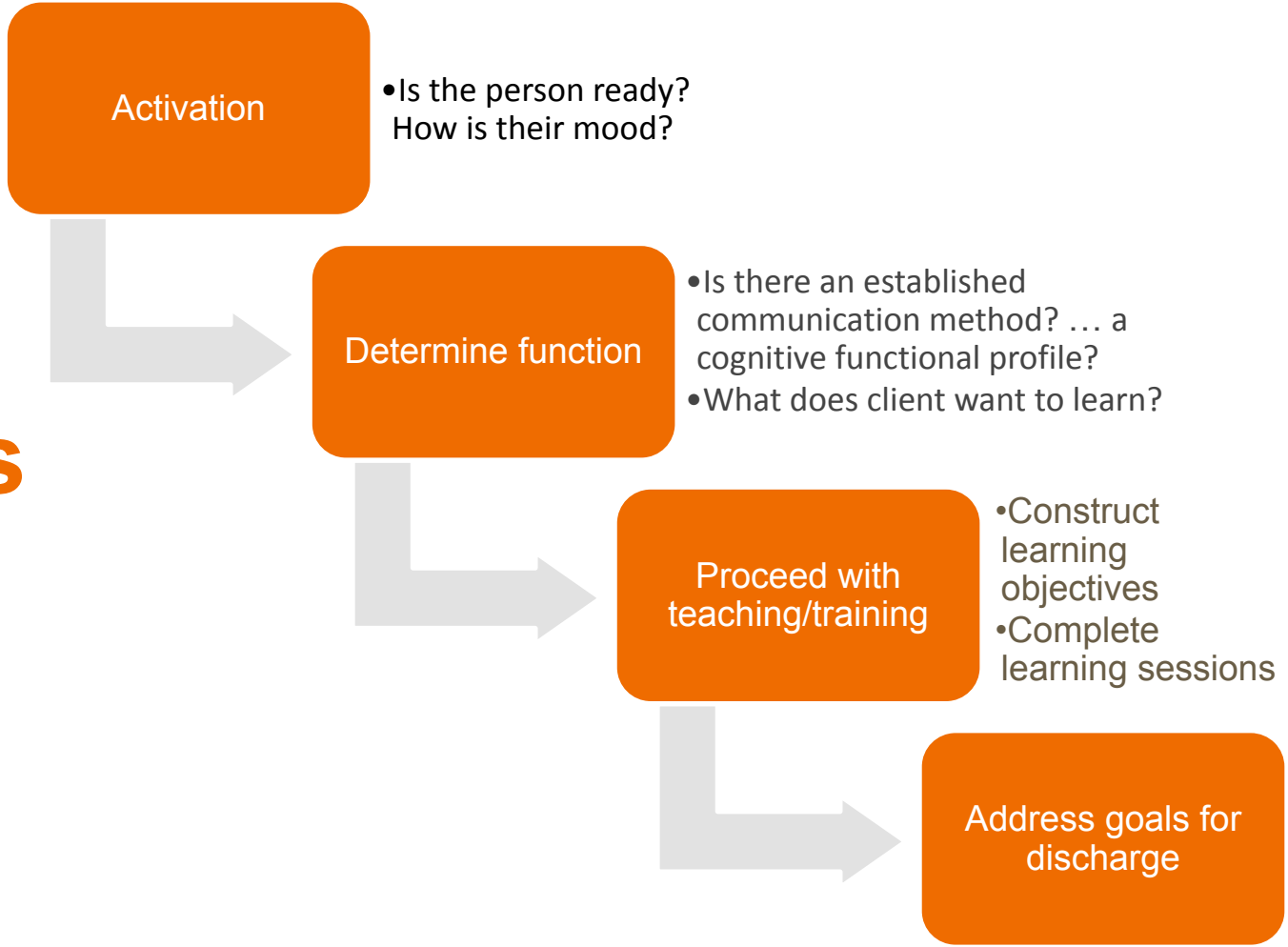
7. Evaluate the learning objective

- Plan time and opportunity for learner to complete the action named in the learning objective within the session **(not homework)**, and name who will evaluate if the learning is met
- If learning level evaluation is met, there is greater chance for transfer level of learning to personal environments
- (Kirkpatrick, 2006)

Learning objective 2: Met

- ✔ Construct a learning session using Kolb's ALM
  - Identify goal (learning need/gap)
  - Define the learning objective
  - Organize handouts and materials
  - Consider relevance
  - Clarify agenda
  - Develop Kolb's ALM for the session
  - Evaluate the learning objective

Learning readiness



Constructing a learning session: Left neglect

- Mr. X is a 72 y/o male with a right MCA stroke and presents with left neglect. His goal is to avoid bumping into walls and items when walking
- Staff observe he is also missing food on his tray, and he is frustrated that reading is now very challenging for him

1: Identify the learning need

- For Mr. X, the learning need is to improve safety when mobilizing and promote independence in ADLs through teaching strategies for left neglect

2: Define the learning objective

- *Condition*: Given game, pre/post score sheet, video, demonstration, paper/pencil activities, discussion, practice, and feedback
- *Performance*: Mr. X will demonstrate scanning to the left
- *Standard*: Such that the lighthouse method (LM) is used when walking in the length of the hallway, and two ideas are named to remind use of technique
- *Evaluators*: Client, carer and staff

3: Organize handouts/materials

- Post pictures of different objects from right to left field of vision
- Prepare pre/post score sheet
- Review lighthouse method (consider a video link?)
- Paper/pencil cancellation exercise

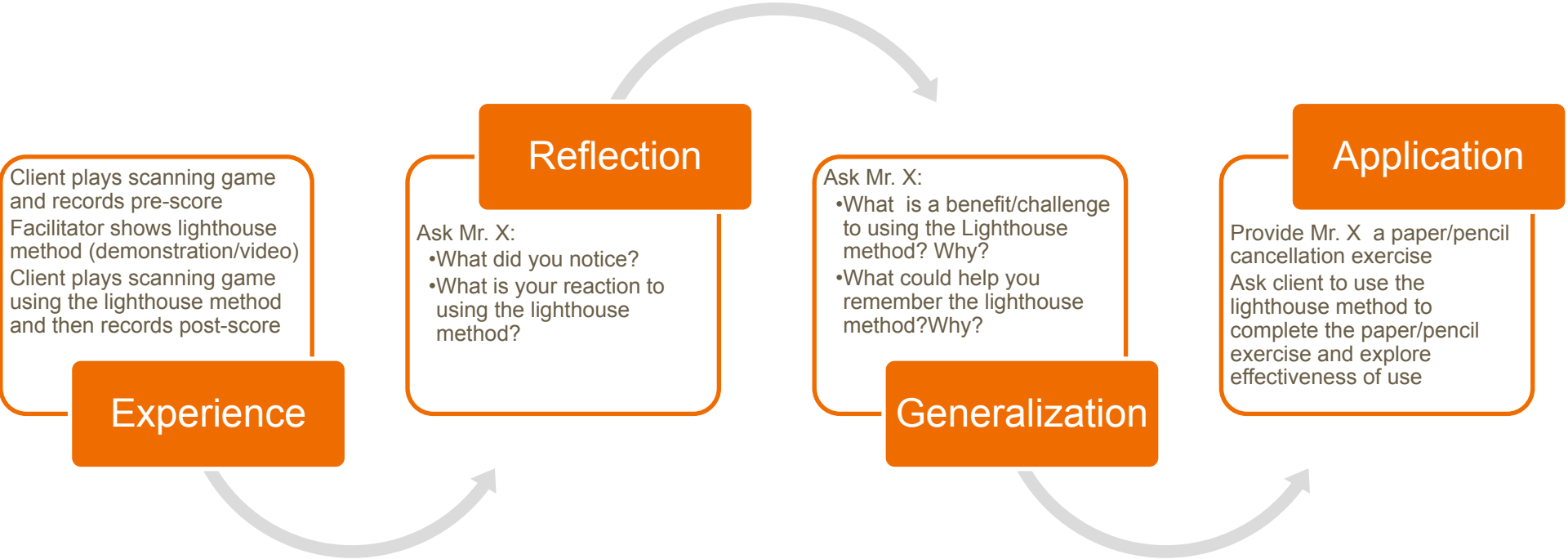
4: Consider relevance

- Say: Left neglect makes it hard to notice and react to what is on the left side of your body. The lighthouse method can help persons with left neglect scan from left to right to improve safety and reduce frustration. This technique could help you when walking the hallway or when reading.

5: Clarify agenda

- Today, you will:
  - Learn and practice the lighthouse method for scanning through a simple game and video
  - Practice scanning on a paper activity
  - Use the scanning method by walking in the hallway and evaluate if it increases safety

6. Kolb's ALM: Lighthouse method



7: Determine evaluation of the learning objective

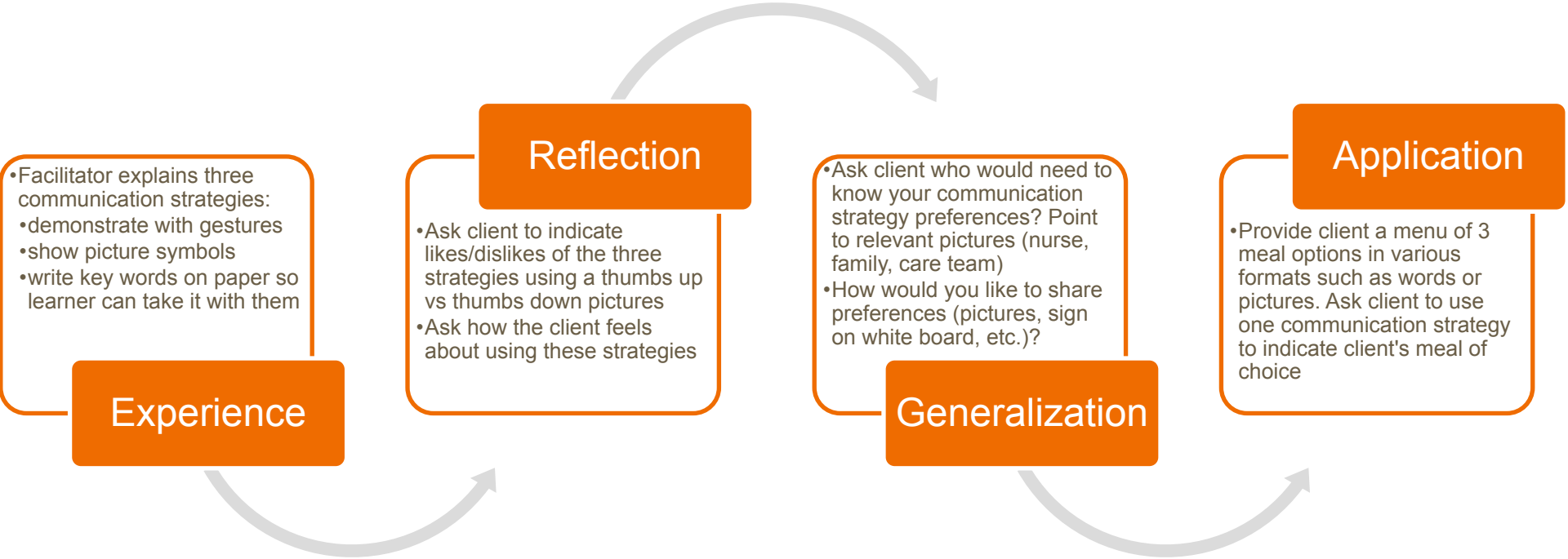
Outcome:

- ✔ Mr. X demonstrates scanning left when walking length of hallway and names two ideas to remind use of lighthouse technique
- ✔ Evaluated by Mr. X, therapist and carer

Relevance & agenda: Communication strategies for aphasia

- Say: Knowing strategies to communicate when you have expressive aphasia can reduce frustration
- I will show three options to improve communication
- You will use one communication strategy to choose preferred foods for your meals

Kolb's ALM: Communicating meal preferences



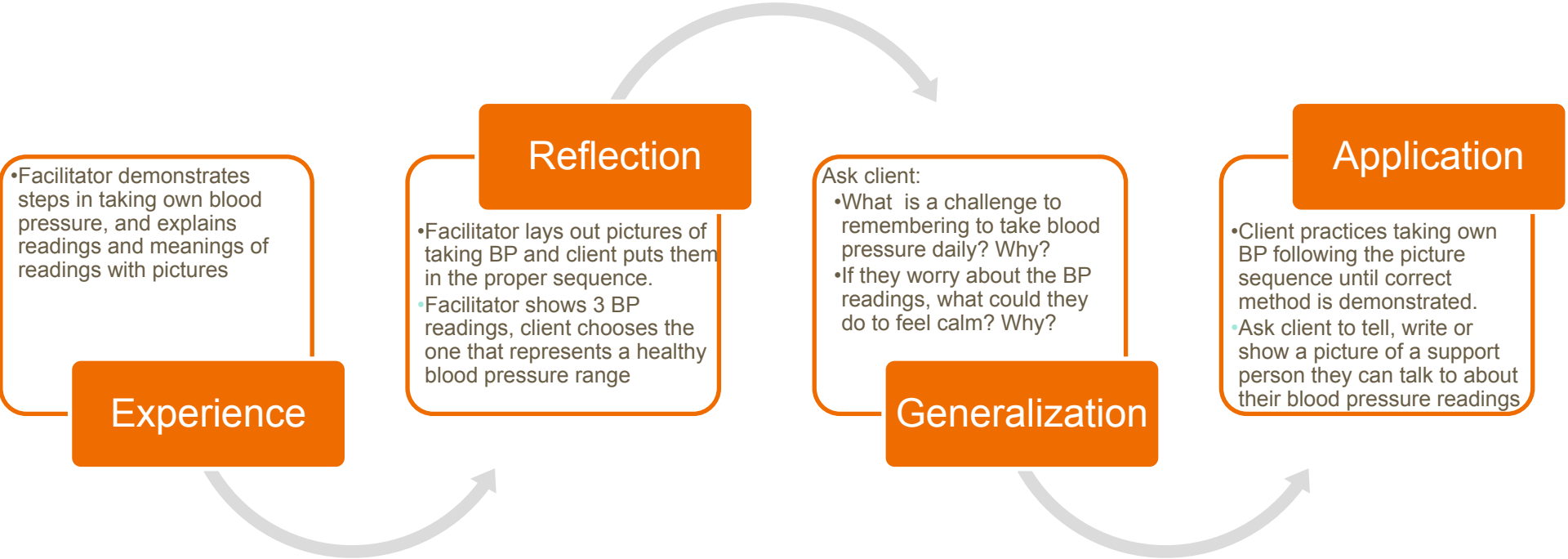
Evaluation: Communicating meal preferences

- Client uses preferred communication method to indicate 5 foods of choice for meals/snacks

Relevance, agenda: Blood pressure check

- Say: Checking your blood pressure every day can reduce your risk of having another stroke
- I am going to show you how to take your blood pressure. Then you will show me the steps by putting pictures of taking blood pressure in the right order
- You will take your blood pressure with the cuff
- Then tell or show me a strategy to remember taking your blood pressure everyday

Kolb's ALM: Blood pressure check



Evaluation: Blood pressure check

- Client makes a commitment to take blood pressure daily by indicating when they will do it in their daily schedule and chooses a strategy to remind them of the steps

Learning objective 3: Met

- Adapt ALM delivery method for aphasia
  - Provide information in different ways (pictures, symbols, gestures, written words)
  - Follow the 4-stage sequence of Kolb's ALM

Learning objectives revisited

- ✔ Describe the stages Kolb's Adult Learning Model (ALM) (2014)
- ✔ Construct a learning session with the ALM
- ✔ Adapt ALM delivery method for aphasia (communication strategies and blood pressure check)

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Questions or comments

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AND CONTRIBUTIONS TODAY!