**PIVOTAL – Partnerships in Virtual Observation of Teaching and Learning**

A guide for case-based Learning (CBL) and small group clinical tutorials

**Introduction**

Partnerships in Virtual Observation of Teaching and Learning (PIVOTAL) is a flexible process of peer observation of teaching in small group settings which involves reflection, observation and feedback with the purpose of enhancing teaching and learning.

**Essentially:**

*PIVOTAL involves you and a colleague establishing a peer observation teaching partnership, which involves observing, reflecting, giving and receiving feedback on the effectiveness of teaching practices with the aim of enhancing student learning. Students may also be invited to play an integral role in providing feedback on the effectiveness of tutorials and teaching practice from their perspective. This is referred to as an Extended PIVOTAL. A virtual partnership is one where the observation is enabled through filming.*

The PIVOTAL process is flexible. It should be considered as a tool to enable clinicians and tutors to develop their skills as teachers. The Extended PIVOTAL process has the capacity to generate a significant amount of feedback from a peer observation partner as well as your students which will assist you in reflecting upon your teaching. When first embarking on this process, however, you may wish to focus on the peer observation partnership component alone and not request feedback from your students. You may consider that you have received adequate feedback from students through the Student Evaluation of Tutor (SETutor) process at The University of Queensland. The Extended PIVOTAL process has the advantage of providing the student perspective in the same areas of your teaching that you will ask a colleague to provide feedback on. It therefore adds another lens through which to view the effectiveness of teaching and an opportunity of considering how student perspectives may differ from those of you and your colleague. In the end, it is very much your choice as to which process you would like to engage with.

**Why do this?**

The advantage of a peer observation partnership is that the process is centred on dialogue. It is about equals observing each other teach and respectfully learning from each other, giving and receiving feedback, reflecting, sharing ideas and planning for innovation. The focus of peer observation partnerships is professional development, renewal and empowerment.

**Why film?**

Many tutors and clinicians have difficulty observing colleagues teach because of tight schedules or the fact that they teach concurrently, particularly in a tutorial setting, or teach in different institutions or towns. Filming yourself allows a colleague to observe your teaching at a time that is convenient to them, view the film more than once if needed and reflect more effectively on your tutoring. Another advantage of using film is that it allows you to observe yourself teach which provides an opportunity to reflect more deeply on your teaching. Filming also provides you with an element of control in choosing the excerpt of your tutoring to be reviewed. The opportunity is also there if you wish to view the film with your colleague to clarify any feedback. For clinical teachers who may be in different hospitals or dispersed across campuses, the film allows a colleague in another hospital or town to provide you with feedback. The film is destroyed by you at the conclusion of the process to respect the privacy of students and because once the peer observation partnership has concluded, it has served its purpose.

**A note about the templates provided in this guide:**

A number of templates have been included in the appendices of this guide to plan your teaching activity, record observations and obtain feedback. These are provided for your convenience as it is appreciated that many clinical teachers also have the demands of clinical practice and not a lot of spare time. There is, however, no requirement to use any of these templates. You may wish to use some or all of a particular template or you may wish to construct your own. The templates can be adjusted to suit your needs. The only required documentation is that at the conclusion of the observation cycle, you and your peer observation partner record that you have participated in the process via the link on the PIVOTAL webpage. Attached to this link is a brief survey to obtain your feedback on the PIVOTAL process and any suggestions for improvement.

**Process**



Figure 1 Quick Overview of the PIVOTAL process

**STEP 1 – REFLECTION**

The first part of a peer observation of teaching partnership is for you to engage in a period of reflection. Spend some time after your teaching activities to consider your strengths and weaknesses as a teacher. It is important for you to decide what you hope to accomplish from a peer observation partnership. Identify what aspects of your teaching or tutorials you wish to receive feedback on. You may wish to use the ‘Questions to assist with reflection’ (appendix 1a, 2a) to get you started.

**SOME GENERAL CONSIDERATIONS**

**Confidentiality**

Confidentiality is an important component of any peer observation partnership. You must have confidence that your peer observer will respect their role and not share their observations with another person, or use the observation experience in any other context. It is therefore important that both you and your peer observer discuss how any records from the observation process will be handled when the observation cycle is completed. Usually, any written documentation is returned to the person who was observed at the end of the cycle.

**Timing of PIVOTAL**

For those taking regular tutorials, it is important to give some thought as to the most appropriate time in the semester to undertake this process. It may be best to undertake when you have been working with your group for a number of weeks and your relationship with your group is well established or you may elect to undertake it early when your group is still developing. It depends to some extent on what you wish to receive feedback on. Consideration of student timelines is important, particularly if you plan to undertake an Extended PIVOTAL and include student feedback. It should not be done at a time when exams are looming as students will have more pressing concerns than providing you with valuable feedback on your teaching.

**STEP 2 – ENGAGEMENT**

**Engaging a peer observation partner**

The person you invite to be your peer observation partner is **your** choice. Your peer observer should be someone you respect and trust and with whom you have a comfortable relationship. You may choose your partner because he/she has experience in the same or a similar teaching or tutoring role to yourself. However, you may wish to invite a colleague teaching in a different context at the University whose perspective you would like to consider. Your partner must be willing to invest time into the partnership as the commitment requires discussion, observation and the provision of both verbal and written feedback. Your peer observer should be a colleague who can highlight positive teaching characteristics but also be able to provide constructive and specific feedback on behaviours that could be improved, modified or developed to improve student learning. A close colleague who is reluctant to provide a realistic viewpoint or conversely a colleague known to be negative or selective in their feedback is not an ideal choice as a peer observer. It is best to invite a colleague who represents a balance between these two extremes. As the person being observed, it’s up to you to decide who observes, when and in what context the observation will take place. Invite your colleague and set time aside for a pre-observation meeting. Information concerning the role of the peer observation partner is provided in the appendix (1b, 2b). As this is likely to be helpful to your partner you may wish to provide him or her with a copy.

**The role of the peer observation partner**

The peer observation partner is someone who will observe film footage of your tutorial or teaching activity, provide honest and supportive feedback and encourage you to think about your tutoring and student learning. Although peer observation can obviously help improve teaching practice, there are a number of issues that need to be taken into account to ensure its success. The most common challenges to implementing a peer observation partnership are time and workload constraints. It is important that you and your colleague are clear about what is required on both sides of the partnership and that clearly defined timelines are agreed for all activities. An estimation of the potential time involved for you and/or your partner would be as follows: Pre-observation meeting and discussion 30–60 minutes, period of review of film footage 30–120 minutes, compilation of feedback 30–60 minutes and post-observation meeting 30–60 minutes. Therefore, the time involved could be in the vicinity of 2–4 hours. For more information on the role of the peer observation partner please refer to appendix 1b, 2b.

**Engaging the students**

An extremely important part of this process is to engage the students whether or not you are undertaking an Extended PIVOTAL. This should be done well in advance of the tutorial you plan to film. Explain to your students that as part of your professional development as a tutor you would like a colleague to observe your teaching and in order to achieve this most effectively your teaching needs to be filmed. Explain to the students that filming provides you with an opportunity to observe yourself and for your colleague to watch the footage in their own time and provide feedback. It is important that students understand that the film will be destroyed once the observation cycle is complete and that no one else will view the film other than you and your peer observation partner. Encourage students to ask questions about the process and ensure that they are comfortable. Invite any student who may have concerns about the process to contact you directly.

If you plan to complete an Extended PIVOTAL, explain to the students that you hope to obtain specific feedback from them about your tutoring practice. Highlight to the students that the feedback will be via an anonymous paper survey which you will distribute, it will take approximately 5–10 minutes of their time to complete and that it will be undertaken at the end of the tutorial you film.

Inform students that you will bring the consent forms next time you are scheduled with them. This provides students with time to raise any concerns with you. Have the students complete the consent forms at the start of your next tutorial (see appendix 1c, 2c for the student consent template).

**Consent**

It is important that you obtain consent from students, any staff members or patients that may be involved in the filming process. Please refer to the appendix for templates for obtaining these various consents (appendix 1c, 2c, 2d). At the end of the observation cycle the student consent forms should be forwarded in an envelope via the internal mail system to the Case-Based Learning Coordinator, Medical Education Unit, Mayne Medical School, for secure storage.

**STEP 3 – PREPARATION**

Prior to the filming, you should prepare for your tutorial or teaching activity as you normally would. CBL tutors should review the tutor guide and the resources offered to students as they normally would in preparation for a tutorial. In the context of other teaching activities, consider any pre-reading that has been set, any intended learning outcomes or learning objectives, the learning activities you have planned and review any presentation you have prepared. Consider what you hope the students will achieve as a result of your tutorial or teaching activity and what strategies you might use to assist students in achieving these. For teaching sessions where a tutorial guide is not provided, develop a brief tutorial or lesson plan to share with your peer observation partner, include what you hope to achieve and how you expect to manage the session. Brief guides to writing intended learning outcomes and a tutorial plan are included in the appendix if you wish to use them (appendix 2e, 2f).

A critical part of preparation is to identify the priority areas that you would like to receive feedback on from your peer observation partner and/or students. The questions you thought about during the reflection process (Step 1) will have helped you identify some of these areas. You may wish to use the PIVOTAL Observation Recordtemplateprovided (refer appendix 1e, 2h)oruse it as a framework to construct your own form. This will be the form on which your peer observation partner will document their observations.

**Seeking specific feedback from students - the Extended PIVOTAL**

Inviting students into the PIVOTAL process recognises them as partners in improving teaching and learning in tutorials. The Extended PIVOTAL process provides an opportunity to obtain feedback from your students on issues that you determine you want feedback on. For CBL tutors, this feedback will be more specific and likely to be more meaningful to you compared to the more generic SETutor evaluation. For clinical tutors or tutors developing their own teaching activities, the student perspective on whether the intended learning outcomes were achieved, feedback on your tutoring practice and management of tutorials can be obtained. Asking students to consider the same priority areas for feedback that you request of your peer-observation partner provides the student perspective. It is recommended that you reflect on the same items of feedback you request from your students before considering the feedback you receive. A template is provided to capture feedback from students (refer appendix 1d, 2g). You can adjust this template to suit your needs as this will form the survey that you ask your students to complete at the end of the tutorial you film. The broad areas for consideration include the priority areas you identify, student learning, group learning, group process and roles. You will note that the suggested items for consideration are the same listed in the template that your peer observation partner will be asked to reflect on as well. Thus, it will be of interest to you to compare your own reflection to that of your students and peer observation partner on exactly the same items.

**STEP 4 – FILMING OF YOUR TUTORIAL OR TEACHING ACTIVITY**

Once you have developed the observation record for your peer observation partner and for those undertaking the Extended PIVOTAL, plus the feedback form for your students, you are ready to film. Your filming does not need to be motion picture quality, it simply needs to provide a clear audio and view of you, your students and any visual or physical resources you employ in your teaching activity. You will need to obtain consent from your students and any other staff member or patient who will be included in the filming process.

A student may request that they are not captured visually on film and this should be respected. In this situation, your filming should focus on students who are comfortable and other students can be seated out of view of the camera or device. Clearly, if a patient or staff member declines to be involved in this process you must respect their wishes.

When thinking about how you will film your tutorial, you will need to consider:

* Where you will set up the camera/device in the room
* What you intend to use – phone or other device, camera
* How you will make the footage available to your peer observation partner – e.g. digital copy onto a portable flash drive (USB is a convenient method) or secure digital sharing using *Cloudstor* technology (see appendix 3)
* Where to place any students who do not wish to be captured on film

One suggested approach with regard to the layout is with you in the ‘hot’ seat as follows in figure 2:

Whiteboard

Camera

Entry

Digital Screen

Figure 2 Possible set up of CBL room for filming

Initially it may feel a little strange filming the tutorial but, surprisingly, it will not be very long into the tutorial before you and the students forget that the filming is taking place and your teaching will revert to its usual approach.

**STEP 5 – SELF-OBSERVATION AND REFLECTION**

When you review the film, again it might feel a bit odd observing yourself on film, however, doing so can reveal much to you about your tutoring style and how you interact with your students. Importantly, it can be a powerful tool to enhance reflection about your tutorials.

When you observe the film footage, reflect on the priority areas that you identified to request feedback on from your peer observation partner. Consider the PIVOTALObservation Record which you have developed for your peer observation partner and reflect on what you see. It is a good idea to formally complete this record yourself as well. If you undertook an Extended PIVOTAL and requested student feedback, reflect on the items you asked your students to consider. Once you have reflected on these items look at the feedback the students have provided you with. Consider where you agree and differ from your students. Reflect on why discrepancies might exist. Consider any suggestions that the students have made.

After reviewing and reflecting on the film, choose approximately 30 minutes of footage for your peer observation partner to review. This does not need to be continuous footage but should be areas that you wish to receive feedback on, particularly in relation to the priority areas you identified.

**Hint:** It may be that a more accurate reflection of your tutorial occurs sometime after the filming commences. At the start of filming you and your students may be more aware of the camera but this will soon dissipate once you get further into the tutorial.

Some tutors may need assistance with converting camera or phone film footage to their computer. Please find links to the Microsoft and Apple websites to provide some help in appendix 3. You may also find helpful advice simply using Google or asking a colleague, friend or family member.

**Hint:** It is not necessary to edit the footage. Another option would be to note the time codes of the footage excerpts you would like your colleague to review and provide him/her with a written record of these. For example you may have recorded a 2 hour tutorial and would like to receive feedback on the following excerpts: 35:25 to 55:10, 1:10:30 to 1:40:10.

Deliver the footage with the PIVOTAL observation record to your peer observation partner at the pre-observation meeting or according to the timeline and manner which you decided at the pre-observation meeting.

**STEP 6 – PRE-PEER OBSERVATION MEETING**

Being observed in your teaching practice is an active process for professional development. In order for the process to be successful it requires discussing with your peer observation partner what you hoped to achieve in your tutorial. Although preferable, meetings need not be face to face. With modern technology such as Skype and videoconferencing, and if you plan to share your film footage and PIVOTAL observation record using *Cloudstor*, your meeting could take place remotely. For busy clinicians this could also occur via phone if necessary.

The purpose of this meeting is to:

* Provide your chosen film segment to your peer observation partner. If you are not meeting face to face this could be shared using *Cloudstor* technology (see appendix 3)
* Provide your peer observation partner with the PIVOTAL Observation Record form you have developed for your partner to record their feedback, which should include the specific areas you wish to receive feedback on
* Schedule the post-observation meeting. Ideally this should in the days following the receipt of the footage by your peer observer. Enough time should be allowed for your peer observer to review the footage and complete the observation record

It may also be an opportunity:

* For clinical teachers, who have developed the teaching material themselves, to discuss the teaching plan and provide their peer observation partner with the opportunity to clarify their understanding of the context and aims of the tutorial

**STEP 7 –POST- PEER OBSERVATION MEETING**

**Prepare to Receive Feedback**

An important part of this process is receiving feedback. Be prepared to receive positive feedback. Some people can feel a little awkward receiving praise from a peer and tend to dismiss it. It is important to take positive feedback on board so that you can appreciate what is successful about your tutoring. Receive positive feedback, verbally acknowledge it and thank your partner for the observation. The majority of people who have had their teaching observed are pleased with the feedback they receive, and are often surprised at how positive it is. In a similar manner, it is also important to be prepared to receive suggestions for improvement. Avoid the temptation to become unreceptive, to justify your position, to make excuses or become defensive. When suggestions for improvement are openly received your peer observation partner will be satisfied that their part of the partnership has been done effectively and will not feel uncomfortable.

Use the PIVOTAL process to elicit feedback. Gain skills in drawing out feedback, and asking your partner to clarify it and expand on it when necessary e.g. ‘What do you consider is the best aspect about my positive manner with the students?’ or ’What do you think I should try to change first to improve student engagement?’ are the type of questions that make this process effective. Keep in mind that you both have the ultimate aim of improving the learning experience for students.

For those that undertake an Extended PIVOTAL feedback from your students is often informative. Do not overanalyse outlier comments from students. A better approach is to look for collective themes in the students’ comments. If one student makes a comment that is different to all other students, reflect on this and why this might be so, but do not change your practice based on a single comment. Every now and then a student may make a comment that is challenging or confronting. Try to consider the student perspective and what could underlie such a comment. If you wish, discuss any challenging comment with your peer observation partner at the post-observation meeting.

**The Post-Observation Meeting**

The post-observation meeting is an opportunity for you and your peer observer to reflect on what you both observed in your tutorial.

Reflection is a collaborative effort and will involve an appraisal of your tutoring by you and feedback from your peer observation partner. Feedback should include observations of good tutoring practice, comments on the specific priority areas that you identified at the pre-observation meeting, as well as areas that your peer observation partner identified as benefiting from further development. This meeting also provides an opportunity to revisit parts of the film segment together to clarify or discuss further.

Once you have shared your reflection and your peer observer has provided you with feedback, if you engaged in the Extended PIVOTAL process you may wish to share some, or all, of the feedback you have received from your students. It is particularly useful to compare the common items for feedback that your students, your partner and you have all considered. Any significant discrepancies may be worth exploring further.

After considering feedback together, you and your peer observation partner should now consider some strategies to enhance your teaching and foster your development. Any areas of *student learning* that you and your observation partner identify as requiring further development from the perspective of the course or learning module should be fed back to the course coordinator.

At the end of the post-observation meeting you should have a copy of your tutorial plan if you developed one, your reflections from observing yourself on film (your PIVOTAL Observation record), feedback from your colleague (PIVOTAL Observation record completed by your peer), any feedback from your students and the film footage that you shared with your peer observation partner. It is most important that the copy of the footage be returned to you so that it can be destroyed or any digital sharing of the footage is deleted as per the agreement outlined to the students.

**STEP 8 – REFLECTION AND CLOSURE**

Spend some time reflecting on the PIVOTAL process. You may wish to formally document your reflections, conclusions and any changes you plan to initiate in the form of a reflective summary for your own records – a template is offered in the appendix if you wish to use this (appendix 1f, 2i).

If you engaged in an Extended PIVOTAL process, it is important to provide some feedback to your students after you have reflected on their comments and met with your peer observation partner. This does not need to be a formal process. Thank the students for offering feedback, identify any themes in their feedback and advise the students of any changes you intend to make as a result of this. Ask the students for any suggestions as to how they could envisage changes happening and proceed from there. You may be surprised with some of the innovative ideas students may offer to help you accomplish any changes.

Even if you didn’t engage in an Extended PIVOTAL you may still wish to share some of the changes you intend to make in your tutorials as a result of feedback from your peer observation colleague. Students usually appreciate being involved and again may help by suggesting some practical ideas to assist you in your process. It is also good role modelling as a teacher to show students that you have reflected on your teaching and wish to improve it. Remember that your students will be tomorrow’s clinical teachers.

**REPORTING BACK ON YOUR EXPERIENCE**

Once the observation cycle has been completed you and your peer observation partner should record that you have completed the process via a link on the PIVOTAL website. Attached to this link you will find a brief 5 minute survey to obtain your feedback on the PIVOTAL process and any suggestions for improvement. As this is a new process for tutors it is important that we evaluate the process to determine its effectiveness and how it impacts on tutors.

**Appendix**

1. Case-based learning package:
	1. Questions to assist with reflection of your tutoring practice
	2. The role of the peer observation partner
	3. Student consent template
	4. PIVOTAL student feedback
	5. PIVOTAL Observation Record
	6. PIVOTAL Closure
2. Small group learning in clinical settings package:
3. Questions to assist with reflection of your teaching/tutoring practice
4. The role of the peer observation partner
5. Student consent template
6. Patient consent template
7. Intended Learning Outcomes
8. Writing a tutorial plan
9. PIVOTAL student feedback
10. PIVOTAL Observation Record
11. PIVOTAL Closure
12. Useful websites
	1. Cloudstor

 <https://www.aarnet.edu.au/network-and-services/cloud-services-applications/cloudstor>

* 1. Windows help

<http://windows.microsoft.com/en-AU/windows-live/movie-maker-import-photos-videos-camera>

* 1. Apple Help <https://support.apple.com/en-au/HT201734>

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