THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

BSPH FIELD TRAINING MANUAL

Department of Health Policy and Management

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A SPECIAL NOTE TO STUDENTS

The *Field Training Manual* explains what is expected of you before, during, and after your field training experience. This manual will also assist you in outlining your learning objectives and focusing your efforts to identify the best field training experience for your expected career path.

The technical details of the experience are covered in this guide. If you read this manual in its entirety, you should find that most of your field training questions will be answered. To be successful in securing an optimal placement, start early, maintain frequent contact with your faculty advisor and the career services coordinator, and keep your eyes and ears open. Treat this experience like a class and schedule time every week to work on your search. There are many resources are at your disposal: faculty advisor, career services coordinator, program director, professional development director, other faculty, seniors and second-year master's students, alumni, mentors, and sometimes even parents, relatives, and family friends.

Some questions you may want to ask yourself as you begin to identify potential field training sites and make a final selection are:

- **INTEREST:** In what am I most interested? Do I want a management oriented or a policy oriented placement? Am I most interested in a specific content area (aging, managed care, mental health) or a specific functional area (financial management, law, marketing)?

- **SETTING:** What kind of agency setting will best meet my needs: local agency (public health, community mental health), hospital, HMO, group practice, state-level agency, national agency, federal government, international agency?

- **LEARNING NEEDS:** Do I want a placement where I can practice skills I already have, or one where I can learn skills I do not have? What are these skill areas?

- **GEOGRAPHIC LOCATION:** Do I want to be in or near Chapel Hill, or in my hometown…or somewhere else?

- **STIPEND:** Do I need to have a stipend? If yes, what is the minimum I can afford to accept?

FIELD TRAINING MANUAL

INTRODUCTION

High quality professional education is a shared responsibility of professional schools and partners. This is particularly true when training requires the acquisition of operational skills through mentored experiences in settings outside the classroom.

Field training is an important component of both undergraduate and master's programs in the Department of Health Policy and Management and is required of all students. Even those students who bring considerable experience with them benefit from well-planned and supervised field training.

A fruitful field training experience does not happen by chance, but is carefully planned. It requires active commitment to the concept of field training on the part of students, faculty, preceptors, and field training agencies, so that effective mechanisms for collaborative efforts can be maintained.

The purpose of this manual is to provide students, faculty, preceptors, and others with a reference on policies, guidelines, and procedures pertaining to the Department's field training program.

I. POLICIES

A. Definition and Purpose. Field training is defined as a planned and supervised learning experience gained through first-hand observations and operational responsibilities in a health services or other health-related agency. While specific activities during field training vary from one field placement to another, all field training should enable students to:

- participate in learning experiences that are not normally available in the classroom, but are essential for sound training in health policy and administration
- test the validity and applicability of classroom learning to practice, thus helping students develop new knowledge and skills
- develop operational skills, gain experience, and enhance professional self-confidence as healthcare managers or policy analysts
- make a service contribution during the course of training that will not only be useful to the agency, but also will enhance the student's management and analytic skills and self-confidence
- identify and develop an agenda for subsequent learning needs
- clarify personal career goals
- broaden the student's professional network base

B. Requirement. A full-time field training experience in a department-approved health services or other health-related agency is required of all students:

BSPH Degree. Students must submit an approved field training plan and successfully complete at least *twelve weeks* (40 hrs./wk./480 hours) of field training under the joint supervision of the HPM faculty advisor and an approved field preceptor. At the end of the internship, the student must submit a field training report, an evaluation of the internship, and participate on a panel to the junior class.

C. Design and Schedule. Field training is an integral part of a student's total program of study. Completing twelve weeks of a supervised block internship during the summer months between the junior and senior years fulfills this major requirement. This allows students to apply the knowledge and skills gained in the first year of their program, explore specific interests and potential career paths, and identify learning needs to address during their final year in the program.

If a student is unable to complete the required 480 hour internship due to illness, injury, family emergency, or any other major life event, the program will allow the student to complete the required hours during the school year (i.e. during senior year) or the following summer (i.e. after the student's senior year).

In the exceptional case, a situation may arise where the student's learning objectives are best met in a "concurrent" field placement during the academic semesters. This option is not intended as a convenience for those who do not wish to spend the summer in an internship, but must be a response to a compelling reason that makes the concurrent placement a better choice. The option is designed on an individual basis by the faculty advisor and the student, and must be presented to, and approved by, the appropriate program director, and the department chair or associate chair; documentation of the proposal and the approval will be kept in the student's official file. **The design must include a minimum of 480 hours of work in the field (i.e., the equivalent of 40 hours/week for 12 weeks).** All policies and procedures pertaining to the summer

internship, except those pertaining to schedule, apply equally to concurrent field training. If concurrent field training is approved, the student registers for field training (HPM 301) in the appropriate semesters.

A well-planned beneficial field training experience requires participation in a series of activities. These activities begin early in the first year of study, continue during the summer and the fall of the second year, and include orientation, site identification and selection, planning, placement, and evaluation. The schedule for typical activities for a well-planned summer internship includes the following:

Juniors: Fall Semester. First mandatory field training orientation to the purposes, policies, and procedures of field training takes place during the student's first semester. Students are required to attend field training orientation and the internship panel, to hold discussions with faculty and with students who have completed internships, to review information in this manual and the department's internship files, and to participate in any scheduled field visits to agencies. Students should rely primarily on their faculty advisors and the career services coordinator for becoming acquainted with the field training program. However, the academic program director, the professional development director, and other HPM faculty can provide helpful guidance in specific areas.

Students are offered as much support as they need and/or want in finding an internship. The Career Services Office maintains extensive descriptive information on potential field training placements, and makes this information available to current students. In addition, the Career Services Coordinator actively sends students information about potential internship opportunities and is willing to contact prospective sites if necessary. Students are also encouraged to work with their faculty advisor to ensure suitable field training placements. Many students find their internship by working directly with the Career Services Coordinator. Some also find their internships through University Career Services or through their own personal search efforts.

The Career Services Office internship files, located in the Career Services Resource Area, contain descriptive material about past and potential placements, student activity reports, project reports, and other pertinent materials. These files contain invaluable information that provides insights into placements at specific locations and gives the student a point of contact inside a specific agency of interest.

After attending the field training orientation and the internship panel, the student should schedule an appointment with his/her faculty advisor. **Faculty advisor** and **student** interaction should be directed toward achieving the following:

- identifying the student's learning objectives based on an assessment of abilities, previous experience, and career interests
- identifying available placement opportunities and selecting the one that is most suitable and feasible for the student

Juniors: Spring Semester. Early in the spring semester (January), the career services coordinator will conduct a second mandatory field training orientation session. Specific field training questions will be addressed and a general assessment of the class's progress in finding an internship will be discussed.

During the spring semester, **students** should work with their **faculty advisors** to:

- make a final decision on the site for field training placement
- prepare a written **field training plan**, with appropriate consultation with the field preceptor
- obtain approval of the **field training plan** by the field preceptor, faculty advisor, and academic program director, with plan filed in the CSO no later than ***April 30***
- distribute copies of the final signed **field training plan** to preceptor and advisor

Juniors: Summer. After reporting to the field training agency on the arranged date, the student will carry out appropriate training activities on a full-time (40 hours/week) basis for the specified length of time, as indicated in the individual field training plan.

Students may not take courses other than field training for credit during the block field training period unless studies are approved by the program director in advance and arrangements are made with the preceptor.

Students should initiate a substantive contact with their advisor and should arrange at least one contact between their academic advisor and preceptor. These contacts may be made via phone, email, or in person and should be made sometime between the second and third week of the internship. It is the student's responsibility to facilitate these contacts.

Seniors: Fall Semester. Returning students will need to complete the following in order to meet the field training requirement:

Twelve-Week Final Report is to be submitted to the Career Services Office (with a copy to preceptor) no later than ***August 3.***

Student Evaluation Form will be sent to each student at the end of his/her summer internship. This evaluation should be completed by the student and submitted to the Career Services Office no later than ***August 3.***

Participation in an **Internship Workshop** will be held early in the fall semester. **All returning students are required to attend and to make a brief presentation on their summer experience.**

E. Stipend. The department recognizes the need for adequate financial support for students during field training and encourages them to seek stipends from field training agencies. However, field training placement decisions should be made principally on the quality of the experience and secondarily on the availability of stipends. When queried by potential placement sites, we encourage them to pay a stipend.

F. Administration. Field training involves active collaboration among the student, faculty advisor, field preceptor, program director, professional development director, and career services coordinator. These responsibilities are as follows:

1. ***Role of students.*** Students are the primary beneficiaries of field training and their role must be as *active* as those of the academic program directors, faculty advisor, and preceptors. Students are expected to:

- develop an understanding of the department's philosophy, policies, standards, and procedures with regard to field training

- learn the mission, goals and focus of work of potential field settings and agencies for meeting individual learning goals through field visits, reading of field reports of students in previous years, and discussions with second-year students, the career services coordinator, and faculty

- ask faculty advisor for assistance in selecting an area of career interest to develop during the internship, select the internship placement site, and develop an appropriate field training plan (and supplements, when indicated)

- maintain active communication with the faculty advisor for guidance and monitoring of field training activities

- provide all appropriate documents to the Career Services Office in a timely manner

- conduct themselves as responsible and mature professionals during field training, complying with the agency's code of conduct, and meeting all obligations and responsibilities according to schedule

2. ***Role of field preceptors*.** Field preceptors are key participants in field training. The quality of their commitment, interest, and efforts has tremendous influence on the outcome of field training.

   Preceptorship of field training implies a dual set of responsibilities. First, preceptors are similar to clinical or laboratory instructors, ensuring a meaningful learning experience for the student with the commitment, zeal, and enthusiasm of a good teacher. The preceptor is also a responsible official in the agency who ensures that students fully comply with its policies and standards. Field preceptors should:

   - develop an understanding of the department's philosophy, policies, standards, and procedures pertaining to field training

   - participate in the preparation of the student's field training plan

   - take a proactive posture in all matters pertaining to field training, including providing the Career Services Office with up-to-date information on their agency for inclusion in the field training resource files and facilitating possible long-term field training arrangements with the department

   - make the student feel welcome in the agency, facilitate the student's orientation, assign appropriate tasks, and provide suitable and regular time for supervisory discussion with the student

   - certify completion of field training by the student and return an evaluation of the student's performance, as well as the department's field training process, to the Career Services Office

Willing and interested preceptors may serve as future liaisons between the department and their agency. Additionally, all internship preceptors will receive information from the Career Services Office detailing expectations, either by email, over the phone or in person.

3. ***Role of faculty advisors.*** Faculty advisors are integrally involved and responsible for participating in the planning and supervision of the field training of their advisees. Advisors should:

   - Meet with students during their junior year to identify career interests and related learning objectives as well as help to identify potential internship locations
   - increase their knowledge of field training opportunities available for students and subsequently help each advisee to gain a proper appreciation of learning opportunities available in different settings
   - help students with the development of a field training plan, document primary responsibilities and learning objectives for the internship. Advisors must approve the plan before students can begin their internship.
   - refer students, when appropriate, to other members of the faculty for advice
   - recommend new preceptors to the Career Services Office
   - respond in a timely manner to any issues that need faculty advisor attention
   - contact the Program Director and the CSC with any concerns that may arise
   - communication with both their advisees' and their advisees' preceptors at least once during the summer to check on student performance thank them for their participation

4. ***Role of academic program directors.*** The academic Program Directors are responsible for reviewing and approving completed field training plans and assigning final field training grades in conjunction with the professional development director. They may also:

   - monitor field training activities to ensure high standards
   - intervene when appropriate in situations that may arise during the placement

5. ***Role of professional development director.*** The Professional Development Director is responsible for guidance in the general oversight of the field training program, including preceptor development and overall quality of the field training experience. In this role, the Director will:

   - arrange for appropriate activities for faculty, students, and preceptors to ensure high-quality field training, possibly to include a professional development conference
   - undertake appropriate developmental activities to expand opportunities for high-quality internship placements
   - assure the maintenance of an appropriate database of past field training experiences as a resource for students in the department

6. ***Role of career services coordinator***. The Career Services Coordinator is responsible for facilitating and coordinating field training activities and for serving as a resource to the academic

program directors, faculty advisors, students, preceptors, and professional development director. To this end, the career services coordinator will:

- serve as a general resource and consultant to the students and to the faculty in all matters of field training
- assist with logistics of the internship placement process
- make initial contacts at new agencies for students
- make periodic reports to the department Associate Chair, Program Directors, and Professional Development Director on all matters related to field training activities in the department
- collect and organize the student's written work for field training and deliver it to the program directors and the professional development director for grading

II. GUIDELINES AND STANDARDS

A. Identification of Field Training Site and Preceptor. Internship sites and preceptors must be approved by the Career Services Coordinator and must meet the following criteria:

1. An agency chosen for field training should:

- be an established health agency
- consider participation in field training a professional obligation
- have one or more ongoing programs that could provide the student with needed learning opportunities
- have an opportunity for the student to gain important operational experience
- have competent staff who are interested in ensuring that the student learns as much as possible while in the agency
- provide necessary materials support to the student, such as a desk, supplies, travel, secretarial support, and the like, in order to facilitate the completion of any tasks the student is assigned as part of field training

All internship preceptors will receive information from the Career Services Office detailing expectations, either by email, over the phone or in person.

2. A professional chosen as a field preceptor should:

- hold a responsible position within the agency
- recognize the preceptor's role as an opportunity to teach
- be professionally qualified to meet the needs of the student

- participate in the development of the field training plan
- have the ability to assign duties, provide necessary resources to the student, and facilitate communication with others as appropriate
- be able to devote sufficient time to field training activities, including planning, supervision, and evaluation
- be amenable to working and interacting with the faculty advisor

A student who wishes to do field training in an agency in which she/he is currently working, or has previously worked, must:

1. hold a different position than that currently/previously held and/or be assigned different tasks than those currently/previously assigned; **and**
2. report to a different supervisor than currently/previously responsible.

In unusual circumstances, and on an exception basis, it may be appropriate for the student's internship to comprise a major research project and for a faculty member to serve as the student's preceptor. *In such cases, the Director of the student's degree program and the department Chair or Associate Chair **must** review and approve the placement.*

B. Registration. A student must be registered while serving an internship. Registration and billing for field training is done in accordance with UNC Chapel Hill's fall schedule. Registration for field training credit is required for each degree program as follows:

***BSPH Students*:** Register in March for **two** credits for HPM 393 (formerly HPM 301) (**Summer Session I and Summer Session II**). Students will pay tuition based on in-state or out-of-state status as well as the summer field training fee. **The field training fee of $400 is paid with registration as well as all other fees set by the university.** Students initially will receive a grade of "S" for this course, which will be changed to a permanent letter grade at the successful completion and evaluation of field training.

C. Fee. The field training fee, approved by the university, contributes to the support of the Career Services Office and to faculty and student activities pertaining to field training.

The field training fee is $400 for undergraduate students. The total cost for the field training (tuition plus field training fee) depends on whether the student is an in-state or out-of-state student for tuition purposes, and the number of credit hours to be earned.

D. Site Visits. While it is desirable for the student to visit the prospective field site for initial, pre-placement discussions, this is not mandatory. Students may choose to make exploratory visits during holiday and/or semester breaks.

E. Written Materials. Each student, faculty advisor, and preceptor is required to prepare appropriate documentation pertaining to various phases of field training and to file these with the Career Services

Office. Students must complete the flowing requirements in order to receive credit. These requirements are as follows:

- ***Field Training Plan.*** A detailed and approved field training plan must be submitted to the Career Services Office prior to starting the internship. This plan is an agreement among the student, preceptor, and the department that ensures that each party agrees to all objectives of the field training. All involved parties must sign the plan before an internship can start (preceptor, student, faculty advisor, and program director). Students should also submit a copy of their field training plan to **both** their field preceptor and their academic advisor. The deadline for submission is ***April 30*****.**

- ***Field Training Report.*** The final field training report should be 3-4 pages in length. It should include a brief statement of accomplishments and reflection on learning objectives outlined in the Field Training Plan. It should also address whether all of the field training plan learning objectives were completed and if not, why not. Identification of any issues that need the faculty advisor's attention should also be included. Copies of project reports and/or other examples of the student's internship work should be included if available and non-confidential. The deadline for submission is no later than ***August 30***.

- ***Student's Evaluation of Field Training.*** All students will receive a student evaluation form which will include specific questions pertaining to their internship site and their preceptor. **Students should submit their evaluation no later than *August 30*.** Those who do not receive the form should request a copy from the CSO. This evaluation helps the department evaluate the internship process and make changes if necessary.

- ***Preceptor's Evaluation.*** Preceptors will receive an evaluation form from the Career Services Office at the culmination (or shortly before) of the internship period. Preceptors are asked to complete the evaluation of the student's performance in specific areas and the overall internship experience and return it to the CSO. This evaluation is strongly considered when assigning the student's permanent field training grade.

- **Participation in an Internship Workshop for incoming juniors in the program.**

F. Grade. Grades are assigned for the block field experience (HPM 301) by Program Director after the completion of the training period. Field training is a formal degree requirement; therefore, performance is evaluated with the same rigor as for classroom activities. In determining the grade for each course, the student's participation in the following areas is taken into account:

- field training orientation
- determining learning needs
- placement arrangements
- preparation and submission of field training plan
- preparation of field training reports, according to deadlines
- evaluation of performance during field training by preceptor

- follow-up activities

G. Grading Procedures. For clarity and to avoid misunderstandings, the following criteria for grading have been established:

1. Student met with faculty advisor during the fall semester to discuss internship. *Failure to meet this criterion results in a 1/3-point reduction (e.g., from A to A- or H to H-).*

2. Signed field training plan was submitted to the CSO by ***April 30***; this deadline can be extended at the discretion of the program director for circumstances beyond a student's control. *Failure to meet this criterion results in a 1/3-point reduction (e.g., from A to A- or H to H-). If the field training plan is more than two weeks late, a second 1/3-point will be deducted (e.g., from A- to B+ or H- to P+).*

3. One advisor/preceptor contact initiated by the student and completed between the second and third week of the internship. *Failure to meet this criterion results in a 1/3-point reduction (e.g., from A to A- or H to H-).*

4. Completed field training report and student evaluation submitted to the CSO by ***August 30.*** *Failure to meet this criterion results in a 1/3-point reduction (e.g., from A to A- or H to H-).*

5. Preceptor's evaluation of the student. Five-point performance scales are used in the evaluation. Based on past experience, the following metric is used:
   a. Average score on quantitative scales greater than or equal to 4 = full credit
   b. Average score on quantitative scales greater than or equal to 3 and less than 4 = one-third grade deducted
   c. Average score on quantitative scales greater than or equal to 2 and less than 3 = two-thirds grade deducted
   d. Average score on quantitative scales less than 2 = 1 full grade deducted.

   We often find rating bias in preceptor evaluations. It is recognized that extraordinary circumstances outside the student's control may sometimes account for poor ratings on a field training evaluation. Where average scores fall in the "C," "D," or "F" category, discussion with the preceptor and the student by the program director, faculty advisor, and/or the professional development director is recommended to resolve issues related to student performance.

6. Presentation of the field training experience during an internship event.

   This panel will be structured and conducted by the director of the Career Services Office. All BSPH students will be required to participate in one 20-30 minute panel discussion in which they will be asked to provide a brief summary of their experience and respond to audience questions. Failure to participate will result in a one-third point deduction from the field training grade. This requirement is intended to put closure on the field training experience, as well as to allow junior students to benefit from the experiences of senior students.

7. An internship in a health agency is an important and required component of an undergraduate's degree program here in the Department of Health Policy and Management. A fruitful field training experience does not happen by chance, but is carefully planned.

In assessing these activities and determining a grade, the professional development director, along with the appropriate academic director, will consider the formal evaluation of the student's performance by the preceptor, the student's periodic reports, and whether deadlines were met.

At the discretion of the program director, a student who misses multiple criteria and/or deadlines as indicated in this manual may receive a grade of D or F for the internship (an undergraduate who receives a D or an F will not be considered to have completed their field training requirement).

FIELD TRAINING RESPONSIBILITIES

	Student	Preceptor	Faculty Advisor	Program Director	Professional Development Director	Career Services Coordinator
PRIOR TO FIELD PLACEMENT						
Determine learning objectives and secure field placement *Nov.-Mar.*	**1** Student meets with faculty advisor and CSO	**2** Meets with student to explain agency's mission and operations	**2** Advises student and contacts preceptors in new agencies	**3**	**2** Provides guidance, referrals, as requested	**2** Available as a resource consultant
Field training plan must be submitted to CSO *April 30* (Preceptor, Student, Faculty Advisor, and Academic Program Director must sign field training plans)	**1** Prepares under guidance and direction of advisor and preceptor	**2** Provides guidance and input concerning activities	**2** Directs preparation; provides guidance and input concerning learning objectives and activities	**3** Reviews plans for completeness and detail and approves	**3**	**2** Collects and maintains all field training plans; monitors quality
Copies should be given to **both** preceptor and advisor	**One** Copy of the signed plan must be submitted to the career services coordinator					
DURING FIELD PLACEMENT						
Telephone, email, or in-person contact 2-3 weeks into field training, on or about June 1	**1** Mandatory facilitation of contact: Student should initiate contact with advisor as well as facilitate contact between advisor and preceptor	**2** Communicates with advisor	**2** Speaks with student and communicates with preceptor. Is available for consultation with student and/or preceptor during the internship.	**3**	**3**	**3**

1 = Primary Involvement **2** = Support **3** = Monitoring

	Student	Preceptor	Faculty Advisor	Program Director	Professional Development Director	Career Services Coordinator
AFTER FIELD PLACEMENT						
12-Week field training report due *September 7 to* Career Services Office (CSO). Submit **one copy** to the CSO and **one copy** to preceptor	**1** Prepares report and reviews with preceptor	**2-3** Receives final copy of report from student	**3** May review	**2** Reviews as part of student evaluation for grade	**2** Reviews as part of student evaluation for grade	**3** Provides copy to program director; monitors and maintains reports
Evaluation from student due *August 30* stapled ***to the field training report***	**1** Completes and submits to Career Services Office		**3** May review	**3** Reviews student comments	**3** Reviews student comments	**2** Collects, distributes to program directors, and maintains forms
Evaluation and **completion statement from Preceptor** due no later than *August 30*		**1** Submits to the Career Services Office	**3** May review	**2** Reviews as part of evaluation of student for grade	**2** Reviews as part of evaluation of student for grade	**2** Collects, distributes to program directors, and maintains forms
Field training panel (CSC will determine date)	**1** Mandatory participation			**1** Plans and facilitates panel	**1** Plans and facilitates panel	**2** Records student participation
Grade assignments completed no later than *September 30* (See Section III. F.)			**3** May provide input, as desired and/or requested	**1** Assigns grade, in conjunction with professional development director, and submits to CSO	**1** Assigns grade, in conjunction with program director, and submits to CSO	**2** Submits grade to registrar

1 = Primary Involvement **2** = Support **3** = Monitoring