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## Using the Myers-Briggs Type Indicator® and Ignatian Pedagogy Model for Improved Learning in Master's Level Finance Classes for Nurses

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### Abstract

Faculty of Jesuit universities remain challenged on seamlessly incorporating the Ignatian Pedagogy (IP) Model into the fabric of everyday educational life in a way that is practical, understandable, and relevant to an increasingly demanding learner population. An ongoing longitudinal evaluation of nurse content retention and learner satisfaction<sup>1</sup> in the nonclinical courses of economics, finance, and accounting revealed an unacceptable level of learner dissatisfaction.<sup>2</sup> The generalized reflective process of the IP model was used to assess the specific gaps in expectations and knowledge between learners and faculty as identified by the Myers-Briggs Type Indicator® (MBTI). The gap between contextual understanding and application of the content by learners could be tied to faculty course design and content delivery. The authors found that learner dissatisfaction could be reduced if faculty is aware of the gap in content delivery, design, and evaluation. The use of the MBTI and IP Model together helped bridge the specific IP element gaps in context and content within this specific course structure. The authors found that addressing learner assumptions prior to, and during, content delivery (using the MBTI and IP Model) enhanced the contextual awareness and relevance of content application which resulted in greater learner satisfaction.

### Introduction

Jesuit philosophical insight requires knowledge of oneself. Applying that insight into the practical reality of delivering educational content is a challenge. This paper explores how the contextual awareness and learner satisfaction were increased using the Myers-Briggs Type Indicator® (MBTI), in conjunction with the Ignatian Pedagogy (IP) Model, for two nonclinical courses in the MS Leadership Program at the Loretto Heights School of Nursing at Regis University in Denver, Colorado.<sup>3</sup>

RNs tend to assess, evaluate, and act within a defined set of structures or limitations—these actions are part of the training and expectations in a clinical setting. As a group they are taught to evaluate situations based on well-defined clinical guidelines and develop consistent, detailed action steps after a thorough assessment. The clinical education for nurses in the MS Leadership

Program seeks to refine these skills. However, two courses within the program require these accomplished professionals to remain abreast of the changing dynamics in health care and learn material outside the clinical arena—financial awareness and financial decision-making. This paper focuses specifically on the findings from the longitudinal assessment of Myers-Briggs Type Indicator® (MBTI) preferences for learner populations from 2009 through 2013. The anecdotal information gathered by faculty for these two classes helped identify the context, preferences, natural tendencies, and expectations of this learner population, aspects that tie closely with the IP Model. The MS Leadership Program employs the IP Model as a learning strategy to enhance values-centered learning and reflection in learners at this Jesuit institution.

During the initial financial class, the MBTI analysis is used to explore and enhance learner internal and external self-awareness. The

knowledge from the MBTI types resulted in faculty adjusting class activities, content delivery, and areas of emphasis that would support, and challenge, individual learner and group preferences and experiences.<sup>4</sup> This paper presents the agreement found between the MBTI assessment of learner preferences and the reflective elements of the IP Model as a learning strategy to enhance acquisition of new content in these courses. By considering the similarities in learning strategies between the MBTI and the IP Model, faculty found different ways to adjust course content in a manner that enhances the learner's experience and also reinforces the underlying principles that frame a Jesuit education.

### Identified Gaps

Placing nursing professionals enrolled in the Regis University Master's Leadership Nursing Program in a learning situation foreign to their expertise and clinical background (financial classes) creates a natural anxiety and barrier to learning new content.<sup>5</sup> Except for awareness of a unit budget, many learners lack clearly demarcated reference points when they enter these classes. The content is foreign, the language is foreign, and the logic is foreign.

The mastery, experience, and general knowledge these learners possess in their daily clinical work environments have little function in a financial class until they can translate those processes into financial expectations. As a result, the learning situations, content, and processes in financially-focused classes for many is disconcerting, frustrating, and creates a high level of tension and anxiety which manifests as a feeling of being overwhelmed.<sup>6</sup> The reflective process of the IP Model served as a global template in which to assess the specific gaps the authors found in the expectations and knowledge between learners and faculty as identified by the MBTI. The MBTI, in conjunction with the IP Model, helped identify specific gaps in language, content, interest, and relevance for learners in these specific classes.

Operationally, the MBTI was used to identify learner preferences. This, coupled with their specific comments, was used to determine gaps in content need and presentation structure. By using the element categories of the IP Model (context,

experience, action, and evaluation), faculty could then appraise the course by placing the specific intent of the existing content and learning activities within the appropriate IP category element. Doing the same with learner comments, faculty could appraise the learner readiness using the IP elements, and thus created a visual summary of the multi-layered activities of each course. It was obvious the majority of activities and focus fell within the IP element categories of Experience and Action. It was also clear that greater attention and more consistency in reinforcement were needed in the IP Model element categories of Context and Reflection. The identification of gaps allowed faculty to refine existing approaches specific to what the IP Model identified. For example, to address the gap in Context, faculty began focusing more intently on explaining "why" an activity was useful in a work situation or "why" specific material was necessary to understand a relevant financial concept. While there are formal evaluations included in the courses, the iterative nature of the IP Model Evaluation element reminded faculty of the need to systematically include informal, ongoing iterative reflections and evaluations throughout content delivery.

This knowledge allowed the authors to respond with a more nuanced approach for engaging the needs of these specific learners. While curriculums are meant to close the traditional content gap of what learners need to know, the findings of this longitudinal review found that content focus, the "what" (IP element of Experience) is not enough. What is equally relevant to these learners is to know the "why (IP elements of Context, Reflection, Evaluation) and the how" (IP element of Action) behind the specific content. This subtle shift in awareness has led to a broadening of content delivery. The traditional "task specific" only activities now encompass a wider spectrum of learning, one that includes context (why), and evaluation (how to present and review)—key aspects of the IP Model; of note, something learners said was missing from previous iterations of the classes.

While the curriculum is supposed to meet multiple learner expectations, in actuality this longitudinal review of MBTI assessments found gaps in learner experiences resulting in perceptions that the

Student Breakdown (N=89)					
	2010	2011	2012	2013	National pop
ISFJ	5	2	6	0	most
ISTJ	1	1	2	1	
INFJ	1	3	3	1	least
INTJ	3	5	2	1	2 least
ESFJ	1	1	10	2	most
ESTJ	0	3	1	1	
ENFJ	3	7	4	2	2 least
ENTJ	1	3	0	1	least
ENFP	2	0	4	0	
ESFP	0	1	1	0	
ENTP	0	0	2	0	

Figure 1: self-reported online MBTI survey results of learners from the leadership-only cohort, 2009-2013.

curriculum was task-heavy on the “what” and less precise on the “why” (see Figures 1 and 2). What was less obvious was the relevance about how the “what” of the activities affected strategy, daily operations, budgeting, staffing, and their individual work environments. Certain assumptions made by faculty regarding this learner population raised questions about the structure and presentation of content and its perceived lack of relevance. The evaluation of the IP Model, in concert with MBTI, assisted faculty in identifying the gap between the “what, why, and how” of not only content delivery, but also the gap between how that content applied to everyday real world dynamics. The evaluation identified a gap in the learner’s “contextual” awareness (in IP language) or the “perceiving” aspect of the MBTI.

The greatest gap between financially focused professionals and nursing professionals is the latter are mostly cooperative and relationship driven, prefer consensus, and are unsettled by conflict (F); whereas the natural preference of financial personnel is thinking (T), which reflects a specific reliance on facts, tasks, and clear objectives (in this case related to financial outcomes or money).<sup>7</sup> This preference also treats cooperation and relationships (quality, outcomes, and safety) as secondary, in the sense that they are complementary to financially related priorities. Where financial departments consider dollars and numbers first, clinicians (nurses) consider quality and patient care first. In addition, an MBTI “thinking” preference tends to presume that conflict is a natural part of any interaction. Bridging perceptual habits of thought and

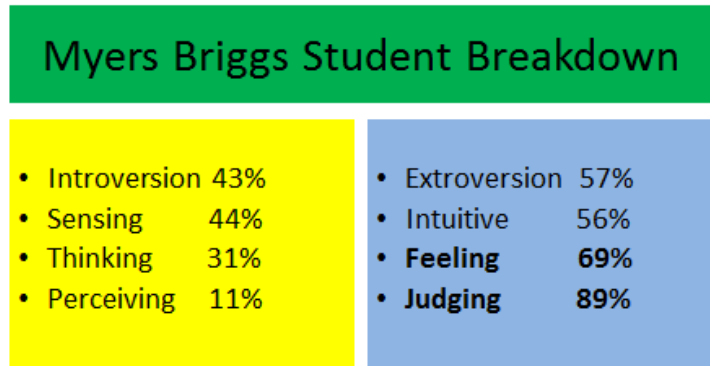
difference is part of how the “why” (IP element of context) can be presented in a manner that is inclusive, rather than one that is antagonistic.

With those differences well established and recognized, the content activities of the class attempt to show why and how those tension points manifest in daily interactions—and how to overcome those differences through understanding, data, and narrative.<sup>8</sup> The gap between preferences and expectations is then explored (using MBTI/IP Model) with an emphasis on what these learners can do to enhance their own self-awareness, and in turn, use that in combination with data/content in a manner that is beneficial to themselves and their employers.

### MBTI Survey Findings

The MBTI gave faculty a concrete framework for creating a context for information delivery. The first step in establishing the pre-learning, contextual basis of any unfamiliar content is to reduce the anxiety surrounding it. One way to quantify this anxiety or possible gap in understanding (based on individual preference), is by asking learners to take any free online MBTI survey as a way to establish baseline preferences and self-awareness. By starting with self-awareness prior to presenting content, faculty attempt to establish a context which begins with the personal assumptions and beliefs of the learners and ends with the preferences of those who work in accounting and finance.

The anecdotal findings (see Figure 2) of this review revealed that the greater majority of nurses exhibited strong F and J tendencies from the MBTI which means they are not only cooperative and relationship driven, seek consensus, and are unsettled by conflict (F for Feeling) but also structured, organized, as well as detailed and task oriented and appreciate standard routines (J for Judging). This latter point is also generally shared by the majority of clinical faculty and those working in the financial arena.<sup>9</sup> How this similarity plays out is part of the on-going learner activities and weekly faculty-learner interactions that occur in a normal classroom exchange.



**Figure 2:** As reported by the learners, this informal table reflects the online MBTI® inventory self-assessment results for the MS in Leadership section of the Regis Nursing program 2009-2013; N=89. The self-assessment material was used for discussions relating to how learners interact with peers and what they expect from those in management/finance. These discussions were the basis for creating a context from which the financial learning activities (the why) could then be fully evaluated and reflected upon. This process helped identify what the learner needed to know (based on their MBTI preferences), why that is important (creates the questions), and gave them a framework for the logic that management uses in decision-making (the purpose of the course).<sup>10</sup>

Note 1: The MBTI online survey was piloted during 2009; however, data were not formally captured.

Note 2: Starting in 2014, the two financial classes, already required for RNs seeking an MS in Leadership, will also be required for those RNs seeking an MS in Education.

The strong ‘J’ preference of the nurses enrolled in these classes is evidenced in the homework assignments. These learners tend to focus more on the doing and getting the assignments correct than understanding why the exercise is important or how management uses the data in decision-making. If this distinction is not recognized, the learners are prone to viewing specific activities as “busy work” with no relevance or context. This response is partly related to the natural reaction to new material, and in part to the ‘J’ preference for detail, structure, and organization.<sup>11</sup>

The online MBTI survey preference indicator helped faculty to define and establish a pre-learning context that offers an opportunity for greater learner understanding of the “why and how” behind the content. By bringing awareness of this gap between preferences and expectations (between context and content), the MBTI, in combination with the IP Model learning strategy, attempted to establish a solid foundation for managing differences and limiting overreactions associated with conflict in the work place. If the real and perceived anxiety of engaging with financial professionals can be lessened, then nurses could be in a better position to explore this vital working relationship on equal terms. Awareness of the larger organizational context can

improve nurse responses at a unit and/or personal level.

### Usefulness of the Ignatian Pedagogy Model

Three of the main elements of the IP Model,<sup>12</sup> **Experience** (personal and/or professional), **Reflection** (centered consideration of an event), and **Action** (what is expected after the learning occurs) are often easy to address and assess. However, in this instance the pre-learning component, the **Context** element, and the on-going/post-learning element, **Evaluation**, were where the gap was most obvious with these learners (see Figure 3). Context is described as an awareness of how the course material is situated in their world or what lens they might view the course material through. A lens might be one of anxiety or anticipation of the course material based on personal values or assumptions about the course. Without context, the experience, reflection, and action are not viewed from an integrated reality and thus any learning can be hindered. By combining the IP Model with the MBTI, faculty could identify gaps in awareness and knowledge which initiated a reconsideration of the course activities and faculty approach to content delivery. This review led to a greater focus and inclusion of the “why and how” (context) in course delivery through increased emphasis and

use of the IP Model in reflection activities.<sup>13</sup> By the end of the longitudinal assessment, learner evaluations anecdotally reflected a greater sense of awareness, growth, understanding, and personal development on the part of the learners—thus delivering on the intent of a Jesuit educational experience—one which integrates the IP Model in the process.

Self-awareness (for learners and faculty) provides the backdrop for considering existing approaches for integrating the reflective IP Model and any leadership inventory (MBTI is considered a type of leadership inventory<sup>14</sup>) in teaching those new to any subject matter. In the global language of the IP Model, learners enter these courses with a lack of **context** and limited financial **experience** from which to take **action**. These limitations prevent

**evaluation** and **reflection** on that unknown content area. The goal is to create the opportunity to share in a manner that allows for understanding the context of the information, and then to act on that knowledge by applying it appropriately in their work place or daily lives. Integrating this awareness with action can initiate personal development and enhance organizational growth. Integration seems only possible, the authors observed, if the initial gap in content knowledge, and more importantly self-awareness, is understood and addressed consistently. Recognizing this gap and methodically doing something about it allows faculty to focus attention in the appropriate arenas, naturally moving from self-awareness to action to self-mastery, expertise, and finally, to evaluation and reflection.

### Ignatian Pedagogy Conceptual Model

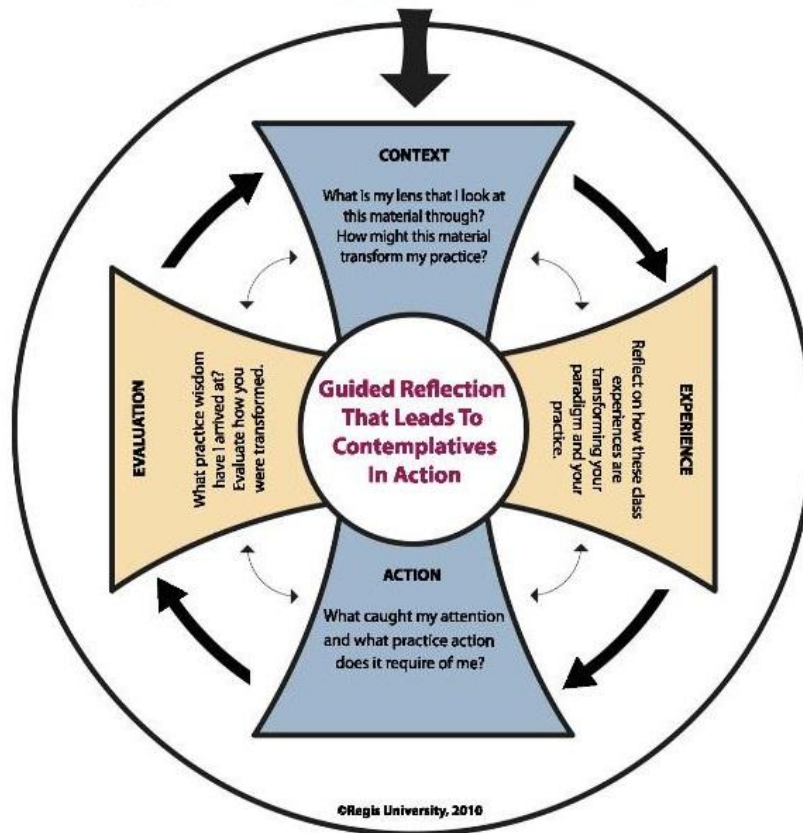


Figure 3

## Implications

### Curriculum

The observations of the authors, based on the longitudinal accumulation of MBTI types (see Figures 1 and 2), suggest that use of the MBTI, in combination with the IP Model, can provide a grounded, logical, and pragmatic approach for actualizing and achieving enhanced faculty and learner self-awareness. If faculty can recognize their own individual preferences and tendencies, this may reveal how certain unconscious assumptions creep into, and subtly affect, curriculum development, classroom priorities, and even relationship interactions among learners. The combined awareness of both the IP Model and MBTI reveals how faculty is better able to integrate the IP into the curriculum. For example, reflection exercises are often one-dimensional “add-ons” and do little to establish a habit of reflective practice. Given that evidence supports the critical importance of reflective practice to safe and efficient delivery of care, the IP Model offers a convenient strategy and format for establishing consistent reflective practice.<sup>15</sup>

In these MS Leadership nursing finance courses, the gap in the learning process was evident in learners asking “why” a great deal during class. The authors felt that this revealed a “lack of Ignatian context,” as evidenced by the disconnect between how the content was situated in their practice, and the curriculum. This was obvious when reviewing the anecdotal MBTI preferences—the majority of both learners and faculty exhibited a strong detailed orientation (MBTI ‘J’ tendency). If one is inclined to focus on detail, then the faculty must constantly link back to the context by anticipating and answering the “why” questions coming from the learners, even if they are not expressed publically. With this recognition and subsequent adjustments made by faculty, the gap and the questions of “why” were reduced dramatically in subsequent faculty course evaluations.<sup>16</sup>

### Faculty

In this University program faculty are primarily nurses. While no intentional MBTI assessment has been conducted internally to identify faculty preferences, anecdotal observation suggests the majority mirror the learners, exhibiting MBTI ‘FJ’

tendencies. These tendencies manifest as a strong competence at organized, task oriented detailed activities. The lack of IP contextual awareness appears in the group dynamics and assessment ability to see broader more long-term implications for the curriculum development (‘P’ in the MBTI, Context in IP Model). There is a strong desire to focus on tasks, checklists, and meeting academic requirements. The question is what else is missing or needed based on the learner and employer perspective?

Faculty with strong ‘J’ tendencies may not be aware of the gap between the activities they deem important and how those details need a contextual (‘P’ perceiving in the MBTI) basis for ‘J’ oriented learners to understand and assimilate the content. Awareness can help address anecdotal evaluations which thematically focus more on “what should I do” and “why this is relevant to me now” attitudes. A central point of these courses is to have the learner glimpse, understand, and appreciate that management is often placed in ambiguous situations and challenged to figure things out on their own. Management is not about clear, distinct, or situationally specific, organized tasks (‘J’ tendency/preference). Although the routine and specific nature of many tasks is an expectation in a clinical situation, management decisions are often not routine and are broader in nature. Appreciation of this difference informs the nurse learner about role expectations.

For individual faculty, the ‘J’ preference presents in a general tendency to assume an expert position that results in not questioning their own context, personal values, and assumptions regarding content delivery or curriculum development. Any faculty assumes they understand the entirety of their situation, and yet, it is not unusual in the hectic nature of curriculum development and teaching to forget to assess an established and approved course using the reflective IP Model. This presents as not asking, not listening, or not hearing what learners, employers, or graduate nurses are saying about the content, delivery, or relevance of the program in the marketplace. The focus is intently on meeting course requirements (task, activity bias or ‘J’ in MBTI), rather than integrating needs from various constituencies (Context and Evaluation elements of the IP Model). Content delivery, as many experts have

suggested, is not learning.<sup>17</sup> Task activities are not ends in themselves.

The blind spot in self-awareness may manifest in overlaying assignments specifically related to the IP, such as parceling out ongoing reflection and evaluations as a discrete task activity, rather than integrating the “what, how, and why” of the content delivery process. Greater awareness of the MBTI/IP dynamic may assist faculty to navigate the thorny curriculum issues where politics and personality often trump logic and self-awareness.

### Opportunities and Challenges

The findings from this anecdotal survey do not assume the knowledge of the IP Model, or the specifics of the MBTI, but rather, they attempt to use that knowledge as a means to integrate the insights into conversations and discussions about curriculum development, assessment, and learner interactions in the classroom. Without a fundamental baseline (IP and MBTI), true integration is minimal, as it relies, and is dependent upon individual faculty who may or may not be able to provide consistency in delivering the general group message, or to actualize the IP Model in practice consistently.

This recognition serves a dual purpose. It reveals how faculty can structure program content that can meet specific learner expectations (tendencies) while reinforcing existing worldviews and/or work habits. It also suggests how faculty can engage more fully their learner’s natural tendencies/perspective of context, experience, actions, reflection, and evaluative methodologies—which is the fundamental IP Model learning strategy.

This process of utilizing both MBTI and the IP Model is not the traditional “what to do” application, but rather, it allows for variations in interest, content, situations, and backgrounds that are knowledge-based and organized within the IP Model strategy. This built-in ambiguity can be disconcerting for those MBTI “J types”<sup>18</sup> (learners and faculty alike) who prefer black and white, absolute structure, content and information in a specific framework, or those overwhelmed and limited by the crush of work-related duties and

responsibilities. What this process suggests is that to engage a full representation of the IP Model within a discussion matrix requires all parties to revisit persona, professional, and group assumptions.

Successfully integrating the IP Model with the MBTI, or any other leadership inventory<sup>19</sup>, can provide a concrete basis for identifying, sorting, and actualizing options available for faculty to create more effective content delivery and more integrated and useful curriculum adjustments. By implementing such an approach, faculty can create a more methodical and inclusive process, one which clearly delineates guidelines that engage and apply the full spectrum of the IP Model, as well as learner/faculty preferences, and still meet organizational needs.

This recognition and application provides faculty an avenue for better understanding the different needs in the classroom and online, allowing them to amend daily and weekly interactions with the learners as necessary. Awareness and implementation of the MBTI, in conjunction with the IP Model, offers faculty an avenue for introducing and reinforcing Context in a way that challenges the general task/activity tendency of the learners (IP elements of Experience and Action) in a way that deepens their specific learning experience.

Faculty awareness increases by working with the questions embedded in each element of the IP Model, particularly in the area of Context. This more methodical effort leads to a conscious application and integration of the IP Model and assures that all elements are adequately and fully represented, discussed, and evaluated within the culture. IP Model questions (see Figure 3) are reminders that assure that the pre-learning Context is established, in which the elements of Experience (content), Action, and Evaluation, are equally reflected on in any organizational or faculty group discussion and decision-making process. This outcome assures the consideration and actualization of IP and general Jesuit principles in the educational experience, one that offers more flexibility and engagement for the learner and faculty alike.



## Application and Recommendations

Piloting this integrated program in one class allows faculty to observe and verify whether the findings from this longitudinal assessment are applicable to their individual, class, department, or college settings. Resistance to change is constant, but faculty excited by such an adventure may find a doorway through the resistance by incorporating the MBTI and IP Model into their teaching practice.

As with any new program, success breeds credibility, which over time dissolves the objections of skeptics. Measurable success and positive responses in course evaluations can initiate a more pointed dialogue among faculty about how to reassess and refine curriculum development processes, group assumptions, and personal approaches to content development and delivery—one that more fully engages the personal strengths of all constituencies involved.

### Key Insights: Application of the MBTI within the IP Model

The following is a summary of the key insights related to the specific situation described in the paper. What follows are some observations on how to expand or evaluate the effectiveness of this approach when applied to different educational environments.

- By using any MBTI instrument, or other leadership inventory/instrument, faculty and learners become aware of the natural tendencies of themselves, and how those might compare with others working in the financial arena. This helps identify multiple gaps in awareness, expectation, and knowledge.
- While many learners have taken the MBTI instrument previously, their ability to use and discuss the findings from a knowledgeable perspective was virtually non-existent, reinforcing the observation that such instruments (by faculty and learners) are seen as an activity, an end in itself, rather than something that needs incorporation into their knowledge base and actualized in their daily lives. Learners and faculty may lack a working understanding about the fundamental value underlying relationship development with financial managers, or how that aligns with

content delivery to meet, in this case, the financial expectations of middle and executive management.

- Much of the faculty/learner population specific to this discussion have a ‘J’ preference, which means they see activities as something specific to be mastered. This means their curriculum activities emphasize task development and completion. The current gap recognized in this longitudinal review was succinctly expressed by learners as “what is the importance of this task?” and “how is it relevant to me?” These specific comments were consistently expressed in the classroom and on evaluations, verifying the existence of the gap.
- The strong ‘F’ feeling tendency of the nurses reveals a preference and focus on relationships and emotional connection. At times this may be at the expense of outcome. Financial areas by contrast (of hospitals in this case) exhibit a preference for data evaluations prior to and, at times, in spite of relationships in business decision-making. This ‘T’ or thinking preference in the financial arenas can be the basis of conflict and misunderstanding or, if treated with recognition, become complementary depending on the awareness of the participants.
- Use of the MBTI combined with the IP Model can increase faculty and learner self-awareness, and assist in the integration of IP elements (see Figure 3) into content delivery, leading to greater understanding and content assimilation. As an evaluative strategy this combination can be useful for considering existing curriculum and faculty development needs.
- Consistent use of the MBTI and IP Model can increase learner awareness and confidence by reducing the fear and anxiety surrounding new content. By recognizing the context inherent in the learner, barriers are dissolved, and opportunities open up for new awareness.
- Actualizing the elements of the IP Model (reflection on Context, Experience, Action, and Evaluation) can more deeply integrate class related activities. This can result in more focused or refined learner actions that may achieve better learner outcomes, and in the process, move the IP Model from an add-on activity in Jesuit educational institutions, to an

integrated element in all aspects of curriculum development and content delivery.

- The embedded questions for each element of the reflective IP Model offers faculty concrete suggestions for how to apply and reinforce the Model's use in professional practice and individual daily routines (see figure 3).

Specifically, the questions of the IP Model are:

- **Context:** What is the lens that I use to look at this material? How might this material transform my practice?
- **Experience:** Reflect on how these class experiences are transforming my paradigm and practice.
- **Action:** What caught my attention, and what practice change does it require of me?
- **Evaluation:** What practice wisdom have I arrived at? How was I transformed in this class?

### Future Considerations: Practical Applications and Recommendations


As a result of this research, there are a number of implications for future practice:

1. Consciously gather and track IP/MBTI or relevant leadership inventory preference data for faculty, college level administration, and learners. Use the IP Model as a learning strategy to identify relevant gaps in "context, experience, action, and evaluation."
2. Develop one question for each IP Model component that can be used systematically and consistently in group, and individual, meetings to assure the full breadth of the reflection process has been adequately covered for learner and faculty development (see Figure 3).
3. Establish a systematic, practical, and measurable system for collecting, sharing, evaluating, and using the preference types in faculty and administrative decision-making, as well as content delivery at the learner level. (This is "how" Jesuit principles can be incorporated and actualized in curriculum, faculty development, and content delivery in the classroom.)
4. Evaluate the existing faculty and class evaluations to assure they are measuring the appropriateness and learner satisfaction of

content delivery as it relates to the core principles of the IP Model: context, experience, action, evaluation and reflection.

5. Examine application of these insights to other administrative, faculty, and learner developmental and evaluation processes at the macro and micro levels of curriculum and department operations.

### Conclusion

The gap between knowledge and practice will continue to widen if universities continue to focus their curriculum and content delivery on specific activities that do not include contextual bearings. However, by incorporating the IP Model in conjunction with a leadership inventory such as the MBTI, universities are better situated to assess faculty and organizational decision-making. For the learner, this approach offers a life-long framework for assessing situations from the viewpoint of Context, Experience, Action, and Evaluation in a manner that achieves a reflective practice that offers the promise of a deeper, more thoughtful, more effective learning and decision-making process, which is the hallmark of a Jesuit education. 

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### Notes

<sup>1</sup> Based on on-going class and faculty evaluations for 2009-2013.

<sup>2</sup> These are anecdotal comments and complaints from learners in faculty and course evaluations.

<sup>3</sup> 614 Introduction to Accounting, Economics, and Finance; 615 Applications of Accounting, Economics, and Finance.

<sup>4</sup> Examples include the addition of the MBTI activity; discussions about fear of financial content; the reinforcement and extensive explanations by faculty about the "why" behind every homework example and tying those activities together through a comprehensive research project that reinforces how the class content is applicable to their specific work setting. Other ways the MBTI/IP knowledge is applied is with individual one-on-one discussions of homework assignments, and then reviewing that homework in class to reinforce learning with the group. The type and tone of faculty comment on an individual's homework considers the MBTI preference of the individual learner. By reviewing homework assignments in class, while redundant, reinforces the new content, while also creating a community space for any residual questions to be discussed. This activity was added by faculty because the majority of learners self-report

an 'F' preference (MBTI), which means they prefer the opportunity for more collaborative and group interaction. The results and feedback from learners over the years has led faculty to adopt an on-going iterative approach to the changes, sequencing and/or amending of content delivery. Faculty have also simplified presentation materials and found alternative resources that better explain specific context or application of content. These changes are done in "real time," meaning that if the same learner questions, frustrations, and problems arise in the content, alternative delivery methods or different content is provided in the next offering of the class until those concerns are resolved. By knowing a learner's MBTI preference allows faculty to evaluate any class/course evaluation by considering it in the appropriate context. The effectiveness measure of this process consists of the reduction of negative comments in learner course and faculty evaluations, and their satisfaction and personal comments about content retention.

<sup>5</sup> By the first class, learners are asked to share their greatest fears about "finance." During the initial class, those fears are discussed. The fears expressed by learners about the subject matter are relatively consistent. Knowledge of the MBTI preferences offers a practical way for faculty to explore and ground those fears in a framework that enhances individual and group learning. Prior to the systematic use of the MBTI, learner fears were not addressed and remained a constant unstated and unexpressed obstacle to learning and content retention.

<sup>6</sup> During 2009-2013, the word "overwhelmed" was consistently and constantly expressed by the learners during both, financial classes and formally in-course evaluations. Learners expressed concerns about the newness of the content and their lack of familiarity with the economics, finance, and accounting content covered in the classroom setting. Note: no formal gathering of MBTI preferences were collected in 2009.

<sup>7</sup> This is a common issue raised during class discussion on organizational budget priorities. Where the majority of learners have 'F' tendencies (see figure 2) they "feel" that financial decisions made on "financial metrics" are harsh and "unfair." By shifting the context (IP element) during the class content delivery, learners are introduced to the "why" (IP elements of Context, Reflection, and Evaluation), which allows them to reassess their original beliefs, and situate their narrow view of budget priorities into a larger organizational context. MBTI information and materials are ubiquitous. There is a myriad of information available on the web and formally in scholarly articles and books on the subject. An introductory reference is <http://www.myersbriggs.org/type-use-for-everyday-life/mbti-type-at-work/>. See also: Peter G. Northouse, *Leadership: Theory and Practice*, 6<sup>th</sup> ed. (Los Angeles: Sage, 2013).

<sup>8</sup> There are two recent articles published based on the observations made during the teaching of these classes. For specific content knowledge as to "what nurses need to know" see Rick Muller and Margo Karsten, "Do You Speak Finance?" *Nursing Management* 43, no. 3 (2012): 50–54, <http://journals.lww.com/nursingmanagement/Fulltext/2012>

[/03000/Do\\_you\\_speak\\_finance\\_13.aspx](http://journals.lww.com/nursingmanagement/Fulltext/2012/06000/Letters.2.aspx). For comments about this article see *Nursing Management* 43, no. 6 (2012): 8-9, <http://journals.lww.com/nursingmanagement/Fulltext/2012/06000/Letters.2.aspx>. For what financial content a staff nurse, manager, or Chief Nursing Officer need to know see Rick Muller, "Bull's Eye! Hitting the Financial Knowledge Target," *Nursing Management* 44, no. 10 (2013): 53–55, [http://journals.lww.com/nursingmanagement/Fulltext/2013/10000/Bull\\_s\\_eye\\_Hitting\\_the\\_financial\\_knowledge\\_target.11.aspx](http://journals.lww.com/nursingmanagement/Fulltext/2013/10000/Bull_s_eye_Hitting_the_financial_knowledge_target.11.aspx).

The latter article was a direct result of reoccurring questions raised by learners during these specific classes.

<sup>9</sup> This is anecdotal evidence by the authors gathered at several organizations. One, of many such resources that describe "type preferences" in relation to work environment is Paul Tieger & Barbara Barron-Tieger, *Do What You Are: Discover the Perfect Career for You through the Secrets of Personality Types*, 2<sup>nd</sup> ed. (Boston: Little, Brown and Company, 1995).

<sup>10</sup> By creating the opportunity for learners to enhance their self-awareness using the online MBTI "survey," helps establish a contextual baseline (IP element: Context) in which to compare their work-related expectations and needs to those in management positions. This ongoing assessment of global organizational needs, in contrast to unit or specific patient needs, is part of the dynamic interchange that occurs throughout the content deliver in both classes—the "what do I need to know" (IP element: Experience). By building on "what" learners believe they know, faculty can reinforce the "why" by placing content in a larger context (IP elements: Context, Reflection, and Evaluation). With this awareness, faculty can create activities and refine discussions that can reinforce and extend content in such a way that provides a richer and more integrated framework in which to understand the logic used in traditional management decision-making.

<sup>11</sup> This statement is what the authors observe in ongoing classroom situations during this specific time period. See also endnote 7 for additional content resources that relate to MBTI breakdowns.

<sup>12</sup> George W. Traub, S.J., *A Jesuit Education Reader* (Chicago: Loyola Press, 2008).

<sup>13</sup> The "major paper" learners are asked to create involves defining the strategic planning, capital, budgeting, and purchasing processes for their employer and the financial criteria used in comparing projects, evaluation of financial requests, and determining decision priorities. The reflection activity asks learners to explore if and how their initial impressions/beliefs have changed about the course/content, their work environment, peers, and the people working in financially related departments. Their initial investigation was to consider the following: What do nurses need to know about finance, hospital priorities/decisions; and what does "finance" need to know about nursing? What recommendations would you make to nursing management and financial managers to increase cooperative working relationships aligning priorities and resources? Their final reflection was to include:

- What did you learn? (No vague generalizations, be specific.)

- 
- How is that relevant to your career/work environment; how does it affect your perceptions compared to where you started? How can you apply it?
  - Why is this important to you or others, now and in the future? Or not?
  - Based on your investigation, what information, education, structures, or processes would you consider/implement to increase your chances of having requests approved by finance?

<sup>14</sup> Leadership inventories in “business scholarship” refer to specific self-assessment models that can be used to ascertain strengths and areas of improvement for any individual. MBTI was used in this situation; however, there are a myriad of other leadership inventories/instruments that might also be equally valuable.

<sup>15</sup> Karen Mann, Jill Gordon, and Anna MacLeod, “Reflection and Reflective Practice in Health Professions Education: A Systematic Review,” *Advanced Health Science Education Theory and Practice* 14 (2009): 595-621.

<sup>16</sup> This is based on the learner evaluations of the course and faculty from 2009-2013.

<sup>17</sup> See Ken Robinson (April 2013): “How to Escape Education's Death Valley” at [http://www.ted.com/talks/ken\\_robinson\\_how\\_to\\_escape\\_education\\_s\\_death\\_valley.html](http://www.ted.com/talks/ken_robinson_how_to_escape_education_s_death_valley.html)

<sup>18</sup> “Type” is shorthand for a set of preferred approaches to interactions and activities. No one is a “type,” but rather prefer to approach situations with a specific lens, a point also made in the IP Model.

<sup>19</sup> For how a leadership inventory was used to assess, evaluate, and define organizational culture, see Rick Muller and Margo Karsten, “The Systematic Deployment of a Leadership Inventory to an Employee Population,” *International Journal of Knowledge, Culture and Change Management* 11, no. 1 (2011), 163-178.