Module 1 – The Role of the Preceptor

Are you wondering what is expected of you when supervising a student during a clinical rotation?

Are you wondering what is your role as a preceptor?

This module will assist you to:

1. Understand the role of a preceptor
2. Be prepared as a preceptor – Before the student arrives
3. Plan an effective orientation
4. Set clear and relevant goals
5. Create an effective learning relationship
6. Build foundational communication skills

1.1 Understand the role of a preceptor

What is a preceptor? 'Preceptor' is a term used to describe what is also called a 'clinical/field supervisor' or 'clinical instructor'. The following quote offers a more specific definition of what a preceptor is:

"an experienced practitioner who provides role support and learning experiences to students and staff learners. A preceptor works with the learner for a defined period of time to assist the learner in acquiring new competencies required for safe, ethical, and quality practice." [1]

[1] Source: http://preceptordevelopment.org/

Five attributes of an effective preceptor

To be effective in the role, an effective preceptor should aspire to the following:

- Demonstrate professional expertise
- Actively engage students in learning
- Create a positive environment for teaching and learning
- Demonstrate collegiality and professionalism
- Discusses career-related topics and concerns [1]

[1] Huggett, K. N., Warrier, R., & Maio, A. (2007). Early learner perceptions of the attributes of effective preceptors. Advances in Health Sciences Education, 13, 649-658. doi:10.1007/s10459-007-9069-z

What do preceptors do?

They **instruct and develop capabilities** by:

- Guiding students in identifying and locating resources (e.g. sources of information such as books, journals, other members of the clinical team).
- Providing an example of best practice in the discipline.
- Demonstrating an inquiring attitude and being seekers of new knowledge.
- Exposing students to the 'big picture' of the organization and of professional practice in the community of care where learning opportunities occur.
- Helping students engage in formative evaluation and refocus as required.

They **inspire** by:

- Leading by example.
- Introducing the student to colleagues who inspire them.
- Being aware of unique opportunities within the agency/organization that may provide inspiration to the student and facilitate the student's availability to participate.
- Setting the bar of performance beyond the merely acceptable. [1]

[1] College of Southern Idaho Health Sciences and Human Services Paramedic Program. (n.d.). A Guide to Preceptorship. Available online at: http://hshs.csi.edu/paramedic/PDF/preceptorship.pdf

What else do preceptors do?

They **provide constructive feedback** by:

- Focusing on behavior/actions with concrete examples.
- Giving feedback in private and in a timely fashion.
- Offering suggestions for the student to try next time and offer to be a resource.
- Creating the greatest possible opportunity for student success.

They **manage risks** by:

- Assisting in risk identification.
- Encouraging development of judgment/actions in the face of risks.
- Modelling preparation for and management of risks.
- Being an advocate for clients and the learner.

They **open doors** by:

- Assisting in making connections to learning opportunities within the placement agency.

- Providing appropriate introductions to others who may influence the student's professional or career development.
- Promoting awareness of contributions made by the learner to the placement agency.
- Being flexible to facilitate learning opportunities that arise throughout the placement. [1]

[1] College of Southern Idaho Health Sciences and Human Services Paramedic Program. (n.d.). A Guide to Preceptorship. Available online at:
http://hshs.csi.edu/paramedic/PDF/preceptorship.pdf

Preceptor Do's and Don'ts

Here are some *do's and don'ts* to keep in mind as a preceptor.

Do:

- Be an exemplary role model
- Meet briefly with your student before daily assignments to discuss student goals and answer questions
- Address issues immediately and appropriately
- Notify student and school/faculty of unplanned absences
- Remember what it felt like to be a student
- Maintain professionalism in attitude, appearance, and confidentiality at all times
- Attempt to offer your student adequate breaks and meal opportunities
- Offer appropriate positive reinforcement (see Feedback and Evaluation Module)

Don't:

- Engage students in gossip
- Impede student learning by assigning only 'busy work'
- Always use the same teaching methods (see the module on Learning Needs)
- Do anything to the student you would not want done to you! [1]

[1] College of Southern Idaho Health Sciences and Human Services Paramedic Program. (n.d.). A Guide to Preceptorship. Available online at:
http://hshs.csi.edu/paramedic/PDF/preceptorship.pdf

Think about it

Being a preceptor may mean wearing many "hats". What are some of the "hats" that you have worn or that you anticipate that you will have to wear as a preceptor? **Enter your response below**.

1.2 Be prepared as a preceptor – Before the student arrives

Here are some important questions to ask yourself before you begin a preceptor experience:

1. Do you have the time and energy to take a student right now?
2. What is your teaching style?
3. How comfortable are you with giving feedback, and other potentially conflictual situations?
4. What supports does your agency provide around taking students?
5. What kind of a caseload will you be expected to maintain during this time period?

The main point is that taking a student requires a considerable amount of thought and preparation, particularly around whether or not your current workload and agency constellation will allow you to comfortably do so. Also, it is important to reflect on your learning and teaching styles and how you anticipate navigating some of the potentially challenging aspects of precepting, like providing feedback and managing conflict. Those subjects are covered in later modules.

[1] Barker, E. R., & Pittman, O. (2010). Becoming a super preceptor: A practical guide to preceptorship in today's clinical climate. Journal of the American Academy of Nurse Practitioners, 22, 144-149. doi:10.1111/j.1745-7599.2009.00487.x

What to find out about your student

Here are some top things to find out about your student before embarking on a preceptor experience:

1. Her learning style.
2. His preferences around feedback.
3. Her current level of skill and experience.
4. His personal learning goals for this placement.
5. Any special needs she has.
6. What he expects from supervision.
7. The academic requirements of her program.
8. What supports are available at his educational institution for both preceptors and students?
9. Who your main contact person is at the school and how to reach them.
10. Why she has chosen to enter this profession. [1]

Obtaining the above information will help you collaborate with your student to create a productive and successful placement experience for you both. It will also help to establish rapport, begin a dialogue between you that should continue throughout your work together, and

provide a foundation for other important conversations you will regularly have, such as feedback. The main point is that the better you know your student, and the more time you invest at the start of the placement in discovering who she is and how you can work best together, the easier the rest of your time together will be. As you will see below, building rapport and trust with your student is an extremely worthwhile investment, and an essential part of the preceptor experience.

[Click here to open up a printer-friendly PDF of questions to ask your student at the beginning of a preceptorship](#).

[1] Alberta Heath Services. (n.d.). Preparing to be a Preceptor. 1-58. Available online at: http://www.albertahealthservices.ca/hr-student-hca-preceptor-handbook.pdf

1.3 Plan an effective orientation

Orienting a student to a new placement involves both practical and relational tasks. Many students in the research conducted for this project identified how helpful a thorough orientation to the placement setting was, in terms of making them feel more comfortable in their new environment, and easing the transition into a new experience. [1] One common way of ensuring that none of the key areas are missed is to create a checklist before the student arrives.

Students need to know:

- The physical layout of the placement
- Where you work and how to find you
- Who to go to if you aren't available
- Their workspace, including computer and telephone access
- The location of any equipment they will be using
- The names and positions of staff they will be working with
- Dress code
- Where and when to eat and take breaks
- Location of bathrooms
- Where to store their things
- The chain of command at the unit/agency
- Daily schedule, including when they are expected to arrive and leave for the day
- The general culture of the agency (i.e. how formal an environment is your unit; political mandate, if appropriate; your colleagues' roles; previous students' roles) [2]

[Click here to open a printer-friendly version of the above checklist for student orientation](#).

[1] [McCarty, M., & Higgins, A. (2003). Moving to an all graduate profession: preparing preceptors for their role. Nurse Education Today, 23, 89-95. doi:10.1016/S0260-6917(02)00187-9](#)
[2] MAHEC Office of Regional Primary Care Education. Setting Expectations: An Educational Monograph for Community-Based Teachers. 1-25. Available online:

https://portal.utpa.edu/portal/page/portal/utpa_main/daa_home/hshs_home/pasp_home/pasp_preceptors/preceptors_files/Setting%20Expectations.pdf

1.4 Set clear and relevant goals

Another important piece of the introduction to a placement is the identification of goals and objectives, which should come from you, the student, and the educational program. Some programs have a predetermined set of goals that students must achieve, and formal mechanisms to assess progress (such as mid-term and final evaluations); others require students and preceptors to create a tailor-made learning contract. In either case, it is important to establish a framework to follow for your time together, including:

- Program requirements
- Student goals
- What you hope the student will learn
- How achievement of these goals will be measured/established
- A detailed timeframe
- A schedule for meeting to review/update goals [1]

[1] MAHEC Office of Regional Primary Care Education. Setting Expectations: An Educational Monograph for Community-Based Teachers. 1-25. Available online: https://portal.utpa.edu/portal/page/portal/utpa_main/daa_home/hshs_home/pasp_home/pasp_preceptors/preceptors_files/Setting%20Expectations.pdf

Think about it

Take a moment to write down your responses to the list of goals on the previous page. Here they are again:

- Program requirements
- Student goals
- What you hope the student will learn
- How achievement of these goals will be measured /established
- A detailed timeframe
- A schedule for meeting to review/update goals

If you have never supervised a student complete it as though you were a student again!

1.5 Create an effective learning relationship

The literature very clearly asserts that the relationship between students and preceptors is an essential component in an effective placement experience. Students who feel comfortable with and trusting of their supervisors tend to be much more engaged in their learning, more able to take chances, talk about and learn from mistakes, and generally feel more confident in their

abilities. One component that was voiced over and over again by students was **the need to feel respected** by their preceptor, and the difference that this made in their learning process [1]. While respect sounds like an obvious concept, it can sometimes be difficult to quantify or describe behaviors that clearly connote it.

Here are some ideas for establishing and maintaining respect:

- Show interest and curiosity in your student
- Take what they say seriously (which first requires careful listening)
- Refrain from judging them in any way
- Be unconditionally supportive, keeping in mind that support can come in the form of constructive feedback
- Correct behaviors, not the person
- Whenever possible, use warmth and humor
- Embrace difference

Darling-Hammond, L., Orcutt, S., et al. (n.d.). Feelings Count: Emotions and Learning. Stanford University School of Education, 5. 89-104. Available online: http://www.learner.org/courses/learningclassroom/support/05_emotions_learning.pdf

Understand the relationship dynamics between preceptor and student

While it goes without saying that hierarchy is inherent in student-preceptor relationships, it is worth noting how this hierarchy can affect a student's ability to voice concerns, and that it in fact often does. In their study on conflict in student placements, Myrick, Phelan et al describe students often remaining silent in uncomfortable or conflictual situations that occur during their placements because of their relative lack of power and vulnerable location in relation to supervisors and other staff. This creates a situation, which places great responsibility on educators and preceptors to create an environment that both protects students and encourages them to have a voice; such an environment can only encourage open communication, which is especially essential in situations in which a student is struggling.

When we, as educators, become truly conscious of the oppressive aspects of our practice, aspects that reflect unchallenged acceptance of values, beliefs, norms and the practices defined for us by others, we can then begin to create a more democratically and cooperative teaching/learning experience. Perhaps then, conflictual situations that emerge can be received without judgment and resolved in a more authentic manner. [1]

In any placement, both the student and preceptor have rights and responsibilities:

Preceptor Rights & Responsibilities	Student Rights & Responsibilities
Set expectations for performance	Receive timely feedback
Maintain appropriate supervision	Question evaluation reports
Access clinical performance	Discuss details of evaluation and performance
Remove any unsafe student from clinical practice	Appeal

[1] Myrick, F., Sawa, R., Phelan, A., Rogers, G., Barlow, C., & Hurlock, D. (2006). Conflict in the preceptorship or field experience: a rippling tide of silence. International Journal Of Nursing Education Scholarship, 3(1), 1-14. doi:10.2202/1548-923X.1202

1.6 Build foundational communication skills

Being a preceptor, even in a best-case scenario, involves having conversations that can be difficult. The preceptor role requires providing constructive feedback, assessment, and evaluation of students, all of which may become potential sources of conflict. This certainly doesn't mean that precepting is necessarily a negative experience; with the right skills, we can be in this role effectively and model appropriate communication to our students. [1]

[1] Rural Instructor Preceptor Project (RIPP). (2011). Preparing to be a Preceptor: A Handbook for Health Care Aide Preceptors. Retrieved from http://www.albertahealthservices.ca/hr-student-hca-preceptor-handbook.pdf

Effective communication

Effective communication involves both (1) active listening and (2) reframing a statement.

Actively listening

Exactly as the term suggests, this technique involves taking the time to listen without planning a response as the other person is speaking, without judging them, and without immediately offering advice. It is important also to pay attention to non-verbal cues, like body language, in order to ascertain a complete picture of what the person is trying to convey. Careful listening can help prevent misunderstandings, and can help to de-escalate conflict.

Reframing a statement

Once you feel that you have understood what someone is trying to express, the next step is offering a response. It is important that you establish with the person that you have been listening, that you have received the message, and that you take seriously what they are saying.

You can do this by reframing: reflect back the essence of what you have heard, removing any hostile tone, and direct the conversation towards problem-solving.

There are four steps in reframing a statement:

1. Acknowledge the emotion
2. Remove the inflammatory language
3. Restate the problem or issue
4. Request or wait for clarification or validation

Here is an example of how to reframe a statement:

Statement: 'I really hate Tuesday mornings. This whole thing just feels like such a waste of time.'

Response: 'So my sense is that you're not happy with how things have been going at the team meetings. What specifically has been bothering you?'

[1] Huggett, K. N., Warrier, R., & Maio, A. (2007). Early learner perceptions of the attributes of effective preceptors. Advances in Health Sciences Education, 13, 649-658. doi:10.1007/s10459-007-9069-z

Finding common ground

Before any issue can be solved, the parties involved have to come to some agreement about what the main issues might be. In addition to bringing the situation closer to finding a solution, coming to agreement on some aspect, even if it's the fact that you don't agree, can de-escalate tension and create rapport. Summarizing what has been said is a key component of finding common ground: [1]

Here is an example:

"So you're saying you want to leave as soon as your hours are done, regardless of what's happening with your cases, and I feel that you should stay until any major outstanding issues are taken care of. So it seems like the issue here is that we're not agreeing on whether it's fair to ask you work extra placement hours- does that sound right?"

[1] Hyrkäs, K., & Shoemaker, M. (2007). Changes in the preceptor role: re-visiting preceptors' perceptions of benefits, rewards, support, and commitment to the role. Journal of Advanced Nursing, 60(5), 513-524.

Establishing clear agreements

Essential to any productive conversation about conflict is the creation of an agreement for future interactions. Difficult conversations can address existing issues, but without a clearly stated understanding of next steps, parties involved can leave with very different interpretations of what will happen next. The next step does not have to be a solution; it could be another meeting, the involvement of another person, etc. The important piece is to ensure that everyone involved understands what will happen next.

[1] Rural Instructor Preceptor Project (RIPP). (2011). Preparing to be a Preceptor: A Handbook for Health Care Aide Preceptors. Retrieved from http://www.albertahealthservices.ca/hr-student-hca-preceptor-handbook.pdf

Think about it

Think of a time in which you provided or received feedback.

* How did you feel?
* What are some of the communication skills that would have made the conversation easier to receive or provide the feedback?
* What were some of the positive aspects of the conversation that made you feel comfortable giving/receiving the feedback.

Review Exercise – Crossword

Test your comprehension of some of the important terms from this module. In this crossword review exercise, enter the word that completes or defines the sentence or phrase. All words come from *Module 1 – The Role of the Preceptor*.

To open the crossword exercise, click on this link (Module 1 – Crossword Review Exercise) or the image below.

Note that the crossword will open in a new window/tab and you will have to return here to continue the module.

Review Exercise – A Preceptor's Checklist

Review the checklist below of tasks to complete during your role as a preceptor. Open and print out this [PDF version of the checklist](#) so you can use it on-the-job.

Before the Learner Arrives

- Review the course objectives and evaluation form.
- Identify your own expectations as a preceptor.
- Solicit staff help in orienting your student.
- Set time(s) to meet with your student.

As the Learner Arrives

- Orient your student to the practice, community, and their rotation.
- Assess your student's level and background.
- Meet with your student to discuss school, their and your expectations for the rotation.
- Agree on 5-7 rotation objectives.
- Communicate with other staff members the student's objectives so that they can include them in discussions about relevant cases.

During the Rotation

- Refer to expectations and rotation objectives as you provide learner feedback on cases presented, during daily de-briefing and evaluation sessions.
- Connect with staff to ensure that your student has had the opportunity to discuss relevant cases with them.

At the End of the Rotation

- Refer to expectations and rotations objectives as you review your student's evaluation with them.
- Collect feedback and note any changes needed for your student to increase the likelihood of successful future rotations. [1]

[1] MAHEC Office of Regional Primary care Education's "Setting Expectations: An Educational Monograph for Community-Based Teachers"

Review Exercise – Final Thoughts on this Module

In this review exercise, enter your answers to the six questions below. One you are done and hit SEND, an email will be sent to the eLearning course supervisor with your answers.

1. Describe what you feel are your main duties as a preceptor.

2. As a preceptor, how will you prepare for the arrival of your student?

3. Name the top three tasks you will employ to orient your student to your agency.

4. What are your top three goals to achieve with your student?

5. How do you plan to create an effective learning relationship with your student?

6. How will you ensure you communicate well with your student?

Please enter your (1) name, (2) email address, and (3) profession below before you SEND. Your information will not be shared with anyone other than the eLearning course supervisor.

References – Module 1

Please note that a Dalhousie NetID may be required to view some of the following articles.

Barker, E. R., & Pittman, O. (2010). Becoming a super preceptor: A practical guide to preceptorship in today's clinical climate. Journal of the American Academy of Nurse Practitioners, 22, 144-149. doi:10.1111/j.1745-7599.2009.00487.x

BC Preceptors Development and Support website. Available online at: http://preceptordevelopment.org/

College of Southern Idaho Health Sciences and Human Services Paramedic Program. (n.d.). A Guide to Preceptorship. Available online at: http://hshs.csi.edu/paramedic/PDF/preceptorship.pdf

Darling-Hammond, L., Orcutt, S., et al. (n.d.). Feelings count: Emotions and learning. Stanford University School of Education, 5. 89-104. Retrieved from http://www.learner.org/courses/learningclassroom/support/05_emotions_learning.pdf

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McCarty, M., & Higgins, A. (2003). Moving to an all graduate profession: preparing preceptors for their role. Nurse Education Today, 23, 89-95. doi:10.1016/S0260-6917(02)00187-9

Myrick, F., Phelan, A., Barlow, C., Sawa, R., Rogers, G., & Hurlock, D. (2006). Conflict in the preceptorship or field experience: a rippling tide of silence. International Journal of Nursing Education Scholarship, 3(1), 1-14. doi:10.2202/1548-923X.1202

Rural Instructor Preceptor Project (RIPP). (2011). Preparing to be a Preceptor: A Handbook for Health Care Aide Preceptors. Retrieved from http://www.albertahealthservices.ca/hr-student-hca-preceptor-handbook.pdf