The Roles of the Preceptor

**Protector**
$safeguards the patient and preceptee$
- Protects patients from novice error
- Protects novice from errors that could threaten self/others
- Ensures adherence to facility policy and procedures
- Provides feedback consistent with standards of practice
- Acts as an advocate for the novice
- Supports developing skills while ensuring safe practice

**Educator**
*$teacher, coach, evaluator$
- Assesses learning needs/styles.
- Collaborates with preceptee to set goals and plan learning activities
- Provides opportunities for learning through appropriate assignments/experiences
- Assesses and develops preceptee’s critical thinking
- Validates competency for the preceptee’s role.
- Gathers and documents evidence of competence.
- Evaluates learning and performance
- Coaches, encourages, and validates performance and capability
- Collaboratively updates the teaching/learning plan with the new preceptee
- Provides feedback through reflective practice and reflective learning discussions
- Adheres to nursing and institutional policies, procedures, and protocols
- Guides the preceptee to seek assistance appropriately
- Discusses issues and concerns about the preceptee’s performance in a timely manner

**Facilitator**
*$role model, socializer, team leader$
- Models professional behavior
- Exemplar for role and “how to access evidence”
- Fosters integration into work culture
- Introduces preceptee to team and other staff
- Understands/supports social needs
- Gives and receives feedback
- Resolves issues/conflict
- Teambuilding: ensures support of colleagues for socialization
# Principles of Adult Learning Theory

## Characteristics of Adult Learners:
- Require Relevance of Learning ("Why do I need to know this?")
- Self-direction
- Need Respect
- Desire Collaboration

## Elements that facilitate learning:
- Motivation = Incorporate things that your preceptee values/appreciates.
- Reinforcement = Providing specific comments to your preceptee as they learn encourages them to continue the positive behavior.
- Retention of information = The amount of information that the preceptee remembers is directly related to how it was taught, reinforced, and practiced.
- Transference = The preceptee needs to be able to use information that was taught or practiced in one setting and apply it to other settings.

## Learning Styles:

<table>
<thead>
<tr>
<th>Style</th>
<th>Preceptee Needs</th>
<th>Preceptor Strategies</th>
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<tbody>
<tr>
<td>Visual</td>
<td>The visual learner uses sight to take in and process new information. It is then reorganized in a fashion that makes sense to the learner.</td>
<td>Pictures&lt;br&gt;Graphs, Diagrams&lt;br&gt;Colorful learning materials&lt;br&gt;(e.g. posters in staff lounge, quick-reference card)</td>
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<td>Auditory</td>
<td>The auditory learner assimilates information best when it is presented verbally.</td>
<td>Traditional lecture formats&lt;br&gt;Audio recordings, Verbal instructions&lt;br&gt;Clear expectations&lt;br&gt;Minimize extraneous noise&lt;br&gt;Two-way verbal communication (e.g. debate or group discussion)</td>
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<td>Read/Write</td>
<td>Words, in all their written forms, appeal most to the learner in the read/write category.</td>
<td>PowerPoint presentations&lt;br&gt;Books/journal articles&lt;br&gt;Policy/procedure&lt;br&gt;Internet search&lt;br&gt;Lists, Handouts, Note-taking</td>
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<tr>
<td>Kinesthetic</td>
<td>The kinesthetic learner prefers a hands-on approach to learning. They place high value on practical information presented in a succinct and logical format.</td>
<td>Coach (vs. demonstrate)&lt;br&gt;Have preceptee gather supplies&lt;br&gt;Promote hands-on experiences&lt;br&gt;Facilitate role-play</td>
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Principles of Communication

Communication Components: Verbal (vocabulary, intonation, pacing, clarity, timing, relevance)
Nonverbal (personal space, culture, body language, attitude)

Effective Communication Techniques:

<table>
<thead>
<tr>
<th>Technique</th>
<th>Definition</th>
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<tr>
<td>Active Listening</td>
<td>Listening actively means that the listener is focused on what is being said and shows interest through his or her body language. The goal of active listening is to fully understand what the other person is trying to communicate.</td>
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<td>Restatement</td>
<td>The best way to ensure that the preceptee understands your message is to have him or her restate, or repeat the message.</td>
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<tr>
<td>Reflection</td>
<td>In reflection, the preceptor identifies emotional themes in the conversation and reflects them back to the preceptee in a nonjudgmental and open manner. This process allows the preceptee to further explore feelings being experienced. (e.g. &quot;I'm sensing from your words and tone that you're angry about this.&quot; &quot;It sounds like you are pleased with how things went.&quot; &quot;It seems as though you're disappointed.&quot;</td>
</tr>
<tr>
<td>Questioning</td>
<td>Questions are a key part of communication. Asking pertinent questions aids the preceptor in clarifying the preceptee's thinking. Questions can be either open-ended or closed-ended.</td>
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Ineffective Communication Techniques:

<table>
<thead>
<tr>
<th>Unclear use of vocabulary</th>
<th>Inappropriate timing</th>
<th>Aggression</th>
<th>Speaking too quickly or too slowly</th>
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<tbody>
<tr>
<td>Offering irrelevant information</td>
<td>Passiveness</td>
<td>Incongruity between verbal and nonverbal message</td>
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</table>
Benner’s Novice-to-Expert Model:

<table>
<thead>
<tr>
<th>Stage</th>
<th>Characteristics</th>
<th>Preceptor Role</th>
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</table>
| Novice      | Little or no previous experience, little situational perception, little discretionary judgement, rigid adherence to rules | - Provide positive feedback  
- Assist the new employee to develop good organizational and prioritization skills  
- Remind the preceptee that there is more than one way to accomplish a task |
| Advanced Beginner | Starts trying tasks on their own, has difficulty troubleshooting, wants information fast, can place some advice in context required, uses guidelines, but without holistic understanding | - Provide positive feedback  
- Listen attentively  
- Role model expected behaviours |
| Competent   | Develops conceptual models, able to deal with ‘crowdedness’, conscious planning, develops routines, troubleshoots on own and seeks out expert advice, sees actions in terms of long-term plans and goals | - Share stories of your own challenges, mistakes, and learning experiences  
- Take advantage of teaching opportunities when things do not go as planned  
- Use humor appropriately |
| Proficient  | Guided by maxims but applies these to current situation, sees situations holistically and sees what is important, self corrects and learns from the experience of others, makes quicker and better decisions that achieve success | - Assist the new employee in positive and creative problem solving  
- Address conflicts that may persist |
| Expert      | Transcends rules, guidelines and maxims, works primarily on intuition based on deep understanding, analytic approaches used in novel or problematic situations, has vision of what is possible and delivers it | - Assist the new employee in positive and creative problem solving  
- Address conflicts that may persist |

Stages of Reality Shock:

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<tr>
<th>Stage</th>
<th>Description</th>
<th>Preceptor Role</th>
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| Honeymoon Phase | Employee loves his/her job and is excited to come to work every day. He/She easily interacts with staff and patients, but may not be effective at processing information and seeing the big picture. | - Provide positive feedback  
- Assist the new employee to develop good organizational and prioritization skills  
- Remind the preceptee that there is more than one way to accomplish a task |
| Shock Phase | Employee sees everything as a problem. The reality of the job does not match with their expectations. The employee may reject the way things are done at work, and this may affect performance. | - Provide positive feedback  
- Listen attentively  
- Role model expected behaviours |
| Recovery Phase | Employee begins to experience a return of humor. He/She is increasingly able to accept the reality of new job role and connect it to initial expectations. Perceptions are more balanced. | - Share stories of your own challenges, mistakes, and learning experiences  
- Take advantage of teaching opportunities when things do not go as planned  
- Use humor appropriately |
| Resolution Phase | Employee has resolved the conflict between current position and past employment or school. The outcome at this stage can be either positive or negative. Preceptors can have a significant role in achieving a positive outcome. | - Assist the new employee in positive and creative problem solving  
- Address conflicts that may persist |
References


Developed by Kaci Meddings 4/2014