

# Foundations & Application of Formal Precepting

Learning Strategies – LEAD Center  
Participant Handouts



# Class Outline

<b>Preceptor Program: What is it? Why is it important?</b>
<ul style="list-style-type: none"><li><input type="checkbox"/> Definition of a Preceptor</li><li><input type="checkbox"/> Benefits of Preceptor Program</li><li><input type="checkbox"/> Preceptor Qualities, Roles &amp; Responsibilities</li></ul>
<b>Stronger Together - Understanding Your Diverse Learners</b>
<ul style="list-style-type: none"><li><input type="checkbox"/> Diverse Learner</li><li><input type="checkbox"/> Adult Learning Principles</li><li><input type="checkbox"/> Adult Learning Styles</li><li><input type="checkbox"/> Orientation Model</li></ul>
<b>Communication, Feedback, and Critical Thinking</b>
<ul style="list-style-type: none"><li><input type="checkbox"/> Purposeful Communication</li><li><input type="checkbox"/> Effective Feedback</li><li><input type="checkbox"/> Critical Thinking</li></ul>
<b>The Orientation Process</b>
<ul style="list-style-type: none"><li><input type="checkbox"/> Transitioning Through Orientation</li><li><input type="checkbox"/> Logistics</li><li><input type="checkbox"/> Questions</li></ul>

# Preceptor Roles & Responsibilities

## Purpose & Benefits

### Qualities & Characteristics

- Role Model
- Educator
- Socializer
- Mentor
- Leader

### Responsibilities

- Manager
- Preceptor
- Preceptee

# Preceptor Roles & Responsibilities

## —THE CONTINUUM CHALLENGE—

Role Model

Educator

Socializer

Mentor

Leader

Topics are placed on top of the continuum line. Explanations / reasoning placed below

Least  
Important



Most  
Important

# Diverse Learners

- Healthcare Culture Characteristics

- Key Take Away

- The goal: *enculturate* new employees to our culture

# Adult Learning Principles

- Motivation
- Goal-Orientation
- Life Experiences & Knowledge
- Relevancy
- Respect
- Practical

<b>Barriers</b>	<b>Advice</b>

# What Is Your Learning Style?

By Marcia Conner

Learning style refers to the ways you prefer to approach new information. Each of us learns and processes information in our own special style, although we share some learning patterns, preferences, and approaches. Knowing your own style also can help you to realize that other people may approach the same situation in a different way from your own.

Take a few minutes to complete the following questionnaire to assess your preferred learning style. Begin by reading the words in the left-hand column. Of the three responses to the right, circle the one that best characterizes you, answering as honestly as possible with the description that applies to you right now. Count the number of circled items and write your total at the bottom of each column. The questions you prefer provide insight into how you learn.

1. When I try to concentrate...	I grow distracted by clutter, and I notice things around me other people don't notice.	I get distracted by sounds, and I attempt to control the amount and type of noise around me.	I become distracted by commotion, and I tend to retreat inside myself.
2. When I visualize...	I see vivid, detailed pictures in my thoughts.	I think in voices and sounds.	I see images in my thoughts that involve movement.
3. When I talk with others...	I find it difficult to listen for very long.	I enjoy listening, or I get impatient to talk myself.	I gesture and communicate with my hands.
4. When I contact people...	I prefer face-to-face meetings.	I prefer speaking by telephone for serious conversations.	I prefer to interact while walking or participating in some activity.
5. When I see an acquaintance...	I forget names but remember faces, and I tend to replay where we met for the first time.	I know people's names and I can usually quote something we've discussed.	I remember what we did together and I may almost "feel" our time together.
6. When I relax...	I prefer to watch TV, view a movie, or visit an exhibit.	I play music, listen to the radio, read, or talk with a friend.	I play sports, make crafts, or build something with my hands.
7. When I read...	I like descriptive examples and I may pause to imagine the scene.	I enjoy the narrative most and I can almost "hear" the characters talk.	I prefer action-oriented stories, but I do not often read for pleasure.
8. When I spell...	I envision the word in my mind or imagine what the word looks like when written.	I sound out the word, sometimes aloud, and tend to recall rules about letter order.	I get a feel for the word by writing it out or pretending to type it.
9. When I do something new...	I seek out demonstrations, pictures, or diagrams.	I want verbal and written instructions, or to talk it over with someone else.	I jump right in to try it, keep trying, and try different approaches.

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<b>10. When I assemble an object...</b>	I look at the picture first and then, maybe, read the directions.	I read the directions, or I talk aloud as I work.	I usually ignore the directions and figure it out as I go along.
<b>11. When I interpret someone's mood...</b>	I examine facial expressions.	I rely on listening to tone of voice.	I focus on body language.
<b>12. When I teach other people...</b>	I show them.	I tell them, write it out, or I ask them a series of questions.	I demonstrate how it is done and then ask them to try.
<b>Total</b>	Visual: _____	Auditory: _____	Tactile/Kinesthetic: _____

The column with the highest total represents your primary processing style. The column with the second-most choices is your secondary style.

Your primary learning style: \_\_\_\_\_

Your secondary learning style: \_\_\_\_\_

Now that you know which learning style you rely on, you can boost your learning potential when working to learn more. For instance, the following suggestions can help you get more from reading a book.

If your primary learning style is **visual**, draw pictures in the margins, look at the graphics, and read the text that explains the graphics. Envision the topic or play a movie in your thoughts of how you'll act out the subject matter.

If your primary learning style is **auditory**, listen to the words you read. Try to develop an internal conversation between you and the text. Don't be embarrassed to read aloud or talk through the information.

If your primary learning style is **tactile/kinesthetic**, use a pencil or highlighter pen to mark passages that are meaningful to you. Take notes, transferring the information you learn to the margins of the book, into a journal, or onto a handheld computer. Doodle whatever comes to mind as you read. Hold the book in your hands instead of placing it on a table. Walk around as you read. Feel the words and ideas. Get busy—both mentally and physically.

**More information on each style, along with suggestions on how to maximize your learning potential, is available in the book *Learn More Now* (Hoboken, NJ; John Wiley & Sons, 2004).**

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A previous version of this assessment was published in *Learn More Now: 10 Simple Steps to Learning Better, Smarter, and Faster* (Hoboken, NJ; John Wiley & Sons, March 2004). Learn about the book and read an excerpt at <http://marciaconner.com/learnmorenow/>.

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# Learning Styles




See  
it



Say  
it



Do it

# Orientation Models

- Conscious Competence

- \_\_\_\_\_

- \_\_\_\_\_

- \_\_\_\_\_

- \_\_\_\_\_

# Purposeful Communication

- Open-Ended Questions
- Affirmations
- Reflective Listening
- Summarize



# Open-Ended Questions

## OARS

### OPEN ENDED QUESTIONS: ("What, Who, or How")

- What part of your day went really well?
- What skill do you feel most comfortable with?
- How do you feel the day went?
- What one thing would you change about today if you could?
- What is something you want to work on?
- Tell me more about....
- How did it feel...?
- What are some things you noticed...?
- How did you prioritize the tasks at hand?
- What barriers did you have to overcome?
- Describe to me how...
- What are your main takeaways?
- How did you know when to ask for help?
- What's happened since we last met?
- How can I help you with...?
- What would you like to do next?
- Help me understand...

### AFFIRMATIONS:

- You showed a lot of patience when you...
- That took a lot of courage to...
- One of your real strengths is...

### REFLECTIONS (Reflective Listening):

- It sounds like you...
- So what you're saying is...
- So you feel...
- You seem...
- You're wondering if...

### SUMMARY:

- Here is what I heard... tell me if I missed anything
- Let me see if I understand

# Powerful Questions List

## Anticipation

What is possible?  
 What if it works out exactly as you want it to?  
 What is the dream?  
 What is exciting to you about this?  
 What is the urge?  
 What does your intuition tell you?

## Assessment

What do you make of it?  
 What do you think is best?  
 How does it look to you?  
 How do you feel about it?  
 What resonates for you?

## Clarification

What do you mean?  
 What does it feel like?  
 What is the part that is not yet clear?  
 Can you say more? What do you want?

## Elaboration

Can you tell me more? What else?  
 What other ideas/thoughts/feelings do you have about it?

## Evaluation

What is the opportunity here?  
 What is the challenge?  
 How does this fit with your plans/way of life/values?  
 What do you think that means?

## Example

What is an example? For instance?  
 Like what? Such as?  
 What would it look like?

## Exploration

What is here that you want to explore?  
 What part of the situation haven't you explored yet?  
 What other angles can you think of?  
 What is just one more possibility?  
 What are your other options?

## For Instance

If you could do it over again, what would you do differently?  
 If it had been you, what would you've done?  
 How else could a person handle this?  
 If you could do anything you wanted, what would you do?

## History

What caused it?  
 What led up to it?  
 What have you tried so far?  
 What do you make of it all?

## Implementation

What is the action plan?  
 What will you have to do to get the job done?  
 What support do you need to accomplish it?  
 What will you do?  
 When will you do it?

## Integration

What will you take away from this?  
 How do you explain this to yourself?  
 What was the lesson?  
 How can you make sure you remember what you have learned?  
 How would you pull all this together?

## Learning

If you had free choice in the matter, what would you do?  
 If the same thing came up again, what would you do?  
 If you had it to do over again, what would you do?

## Options

What are the possibilities?  
 If you had your choice, what would you do?  
 What are possible solutions?  
 What will happen if you do, and what will happen if you don't?  
 What options can you create?

## Outcomes

What do you want?  
 What is your desired outcome?  
 If you got it, what would you have?  
 How will you know if you reached it?  
 What would it look like?

## Perspective

When you're ninety years old, what will you want to say about your life?  
 What will you think about this five-years from now?  
 How does this relate to your life purpose?  
 In the bigger scheme of things, how important is this? So what?

## Planning

What do you plan to do about it?  
 What is your game plan?  
 What kind of plan do you need to create?  
 How do you suppose you could improve the situation?  
 Now what?

## Predictions

How do you suppose it will all work out?  
 What will that get you?  
 Where will this lead?  
 What are the chances of success?  
 What is your prediction?

## Resources

What resources do you need to help you decide?  
 What do you know about it now?  
 How do you suppose you can find out more about it?  
 What resources are available to you?

## Starting the Session

What's occurred since we last spoke?  
 What would you like to talk about?  
 What's new/the latest/the update?  
 How was your week?  
 Where are you right now?

## Substance

What seems to be the trouble?  
 What seems to be the main obstacle?  
 What is stopping you?  
 What concerns you the most about?  
 What do you want?

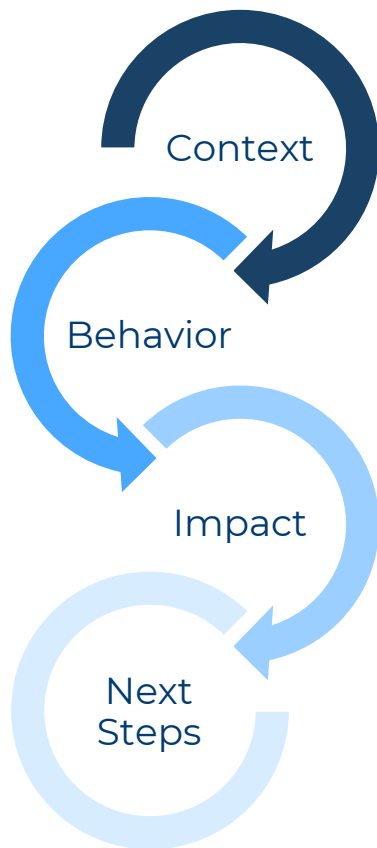
## Summary

What is your conclusion?  
 How is this working?  
 How would you describe this?  
 What do you think this all amounts to?  
 How would you summarize the effort so far?

## Taking Action

What action will you take? And after that?  
 What will you do? When?  
 Is this a time for action? What action?  
 Where do you go from here? When will you do that?  
 What are your next steps? By what date or time will you complete these steps?

# Effective Feedback



- Positive
- Constructive
- Guidelines

# Initiate the Discussion

## Conversation Starters

"I have something I would like to discuss with you that I think will help us work together more effectively."

"I'd like to talk about \_\_\_\_\_ with you, but first I'd like to get your point of view."

"I need your help with what just happened. Do you have a few minutes to talk?"

"I think we have different perceptions about \_\_\_\_\_. I'd like to hear what you are thinking about this?"

"I'd like to talk about \_\_\_\_\_.  
I think we have different ideas about how to \_\_\_\_\_."

I'd like to see if we can reach a better understanding about \_\_\_\_\_.  
I would like to hear your feelings about this and share my perspective as well."

I would like us to have a conversation about something that is difficult for me to discuss.

I want to help you succeed and to do that we need to talk about \_\_\_\_\_.

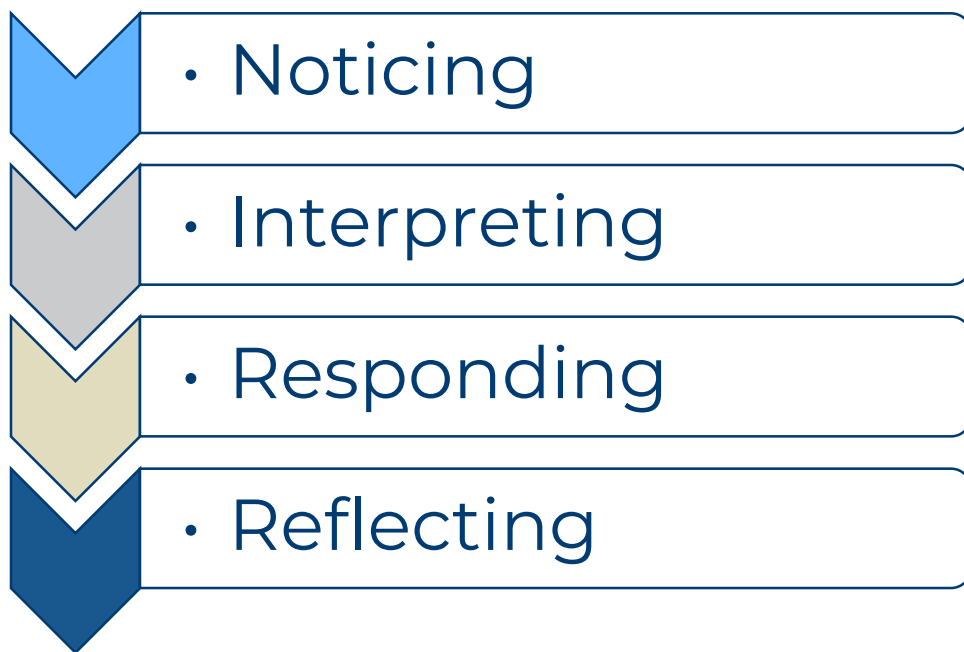
# Feedback Practice

ROOM	SITUATION	FEEDBACK
<b>Example</b>	Your learner was explaining how to find the cafeteria to a visitor, and the visitor challenged the information. Your learner became defensive and used threatening body language with the visitor then abruptly left the room.	"I'd like to talk about how you handled that visitor, but first I want to get your point of view."
<b>ROOM 1</b>	The patient asks for an oral swab after your learner applied health care approved lotion on the patient's feet and legs. Your learner reaches into the drawer to grab an oral swab without removing their gloves and washing their hands.	
<b>ROOM 2</b>	Mike is new to your area. He is very experienced, having worked in a similar role in before. He has been in the department for about 2 weeks, his orientation is going very well. This week you noticed that his language is becoming more 'colorful,' sometimes sprinkling in some crude comments, even in front of others.	
<b>ROOM 3</b>	<p>You are the preceptor for Judy, an RN with over 15 years of experience. This is her 2nd shift with you. She followed you closely yesterday, and assisted with some tasks.</p> <p>You and Judy discussed that today she would begin to get some of the skills signed off on her pathway. An IV needs to be re-started on one of your patients, and you have asked Judy to do it. Judy states "Good Grief, I've put in hundreds, probably thousands of IVs. I certainly know how, just sign me off".</p>	
<b>ROOM 4</b>	You are the preceptor for a new employee. It is nearing the end of his second week on the unit. He seems disinterested in being at work and isn't asking questions. This week he said he prefers to take his meal break alone. He has been about 15 minutes late to work twice.	
<b>ROOM 5</b>	Your learner is in the last week of orientation. You are switching for break. When you return to the department after lunch, you find call lights going off and your learner sitting at the nurse's station on their personal phone.	



# Critical Thinking

- Tanner's Clinical Judgment Model



- Strategies

- Barriers

# Transition Through Orientation

- Beginning

- Middle

- End

# Logistics & Documentation

- Competency Validation

Self-Evaluation of Skill Competence	
1	Unfamiliar with skill and/or unable to do independently
2	Uncomfortable performing skill (Low frequency/high risk skill).
3	Able to perform skill without supervision.
4	Able to teach skill new employees

- Pathway/Checklist Documentation

- Goal Setting

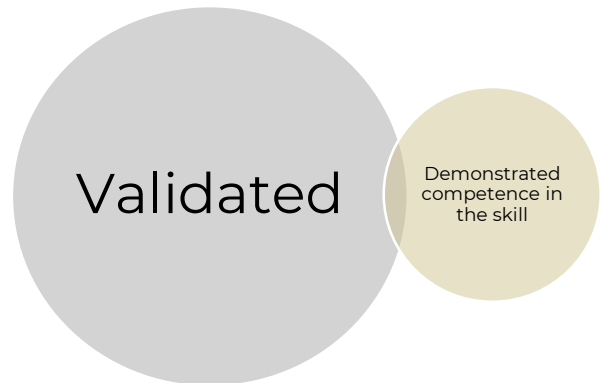
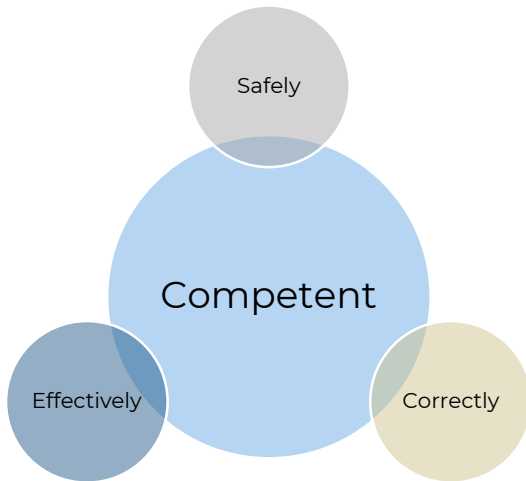
- Progress Reports

# Documentation Tips

The pathway, or self-assessment checklist, is the unit-specific document used to guide orientation experiences for new and transferring employees. This tool demonstrates to credentialing agencies, upon request, that Sanford/GSS staff are competent to perform their role.

It must be completed as thoroughly as possible. The preceptor role include observing and determining validation and documentation of skill competency.

- Self-Assessment: Preceptee completes a self-assessment and their scores assist you in focusing on the areas of greatest need.
- Learning Options: The learning options guide you to additional resources when providing education on a particular topic/skill.
- Competency Validation: Your initials and the date indicate that you, as the preceptor, have determined that the preceptee has demonstrated competency within the listed skill.



## Do's

Remind the preceptee of their accountability for the pathway/self-assessment checklist and should always have it when working

Set a goal of signing off at least 3-5 skills each shift ensure documentation is completed timely

Review the steps of new skills using the teach-back method prior to performing a skill on patients/residents

## Don'ts

Forget to tell the preceptee what they need to correct if you do not sign off on a skill as competent

Forget to check with other staff when seeking learning experiences for your preceptee

Forget to pass on any concerns regarding preceptee progress to unit leadership or education staff as soon as possible so they can be addressed

# PRECEPTOR PEARLS

## What you need to know about the Sanford Health Nurse Residency Program

Transitioning from nursing student to practicing RN can be really challenging. The 12-month program provides strategies to strengthen well-being and resiliency while enhancing clinical judgment and leadership capacity for new graduate nurses. The program was developed in association with Vizient/AACN Nurse Residency Program. RNs with less than 12 months of experience upon hire participate in the residency. There are three residency start dates each year (January, May and September). Nearly 1000 Sanford RNs have completed the residency program so far in Sioux Falls, Fargo, Bismarck, Bemidji, Worthington and Aberdeen!

## What are the Goals of Residency?

- Support the nurse resident’s transition from the role of student nurse to professional registered nurse.
- Promote the development of professional relationships across the interdisciplinary team.
- Strengthen self-confidence and competence in the ability to provide leadership at the point of care.
- Foster professional growth and personal satisfaction through individual development plans.
- Improve the nurse resident’s knowledge of policies, procedures and resources.
- Enhance the nurse resident’s understanding of EBP through direct application in the care environment.

## Residency Seminars

Residents attend monthly seminars that include a topic for discussion and clinical reflection time with peers and facilitators. There is also time for collaboration on an evidence-based practice initiative at each seminar. The seminar topics are designed to support the new RN through their transition to practice. Since the COVID-19 pandemic, most of the seminars have transitioned to virtual meetings. At the end of the program, the residents have a graduation seminar.

Monthly Seminar Topics		
Transitioning to Practice	Managing the Changing Patient Condition	Providing End of Life Care
Advancing Cognitive Shifting	Delivering Quality Care	Maturing Ethical Awareness
Communicating Effectively	Ensuring a Culture of Safety	Leading at the Bedside
Educating Patients	Cultivating a Culture of Respect	Developing Professionally

### ANCC Practice Transition Accreditation Program (PTAP)

Sanford is seeking accreditation for the residency program! Accreditation standards help strengthen the residency program and highlight our commitment to advancing the nursing practice. This accreditation is achieved through writing a self-study to demonstrate compliance with the standards and completing a virtual survey with the PTAP team. The accreditation decision will be announced in the spring of 2021.



## Precepting a Nurse Resident

**TIP!**

Use your preceptor skills to support the residency program.

<b>Role Model</b>	Speak positively of the residency program. Attend residency graduations and any off-unit meetings you are a part of.
<b>Educator</b>	Ask the resident what they are learning at seminar and tie that content into their precepted learning experience.
<b>Socializer</b>	Talk about the residency program with all the residents in your department. Connect former residents with new residents.
<b>Leader</b>	Consider becoming a residency facilitator.
<b>Mentor</b>	Stay connected with the resident even when orientation is complete. Continue to be a trusted resource as the resident progresses through their 1 <sup>st</sup> year as an RN.