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# **Preceptor Program**

A Collaboration California Economic and Workforce Development Regional Health Occupations Resource Center The Orange County Ethnic Workforce Initiative The Nurse Workforce Initiative

#### **Program Overview**

Goal
Program Objectives
Preceptor Roles
Role Model
Educator
Facilitator
Evaluator



# 

# Module One

#### **Preceptor Role**



Definitions

PreceptorPrecepteePreceptorship

### Module 1: Role

DACUM
Develop A CurriculUM
A method to determine the competencies or tasks in a given job.
Philosophy that expert workers can most accurately describe the job.

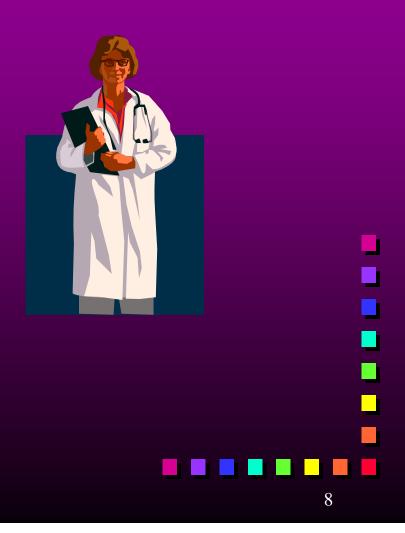
# **DACUM Process**

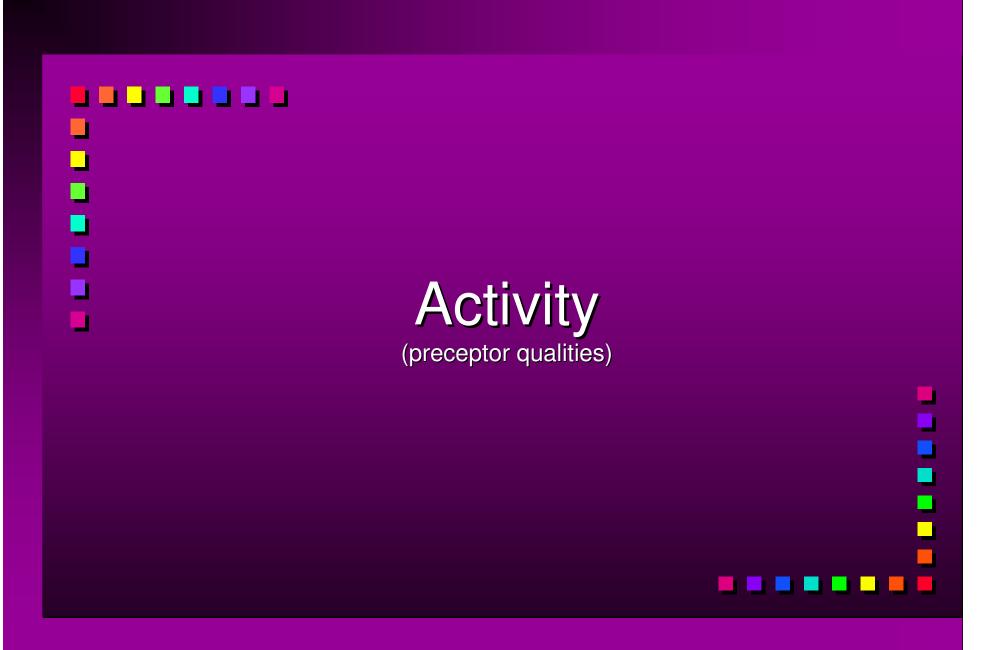
Job Duty Task Step Knowledge and Skills Equipment Traits and Behaviors



### **Role Transition**

Staff NursePreceptor





### An Effective Preceptor

#### Knowledge





Skills



# Knowledge

- Policies/procedures
- Practice standards
- Routines
- Documentation
- Preceptee's job description

- Biculturalism
- Resources
- Principles of teaching/learning/ adult education
- Teamwork

#### Attitudes

Respectful
Realistic
Patient
Open-minded
Dependable
Good Listener

- Supportiveness
- Positive
- Sense of humor
- Constructive
- Mature
- Honest

### Skills

Patient care
Communication
Use of equipment
Use of resources
Interpersonal relations

- Work organization
- Problem-solving
- Decision-making
- Priority-setting
- Delegation

#### **Preceptor's Expectations**

Role definition
Performance expectations
Delineation of responsibilities
Enumeration of expected outcomes for the preceptor program
Valid and reliable evaluation tools **Preceptor's Expectations** 

Available resources
Support system
Adequate preparation for the role
Adequate training

# Responsibilities of the Preceptee

- Identifies own learning needs
- Is active in the learning process
- Readily asks questions



Responsibilities of the Preceptee (continued)



- Reads and follows policy/procedure manuals
- Utilizes resources
- Identifies goals
- Competencies
- Reports concerns
- Evaluates

#### **Preceptee Expectations**

Job Description Preceptor/Job Expectations Unit staff Responsibilities Evaluation Tools/Measures Hands-on Experiences Support Systems



#### Stress

Internal Stress

#### External stress



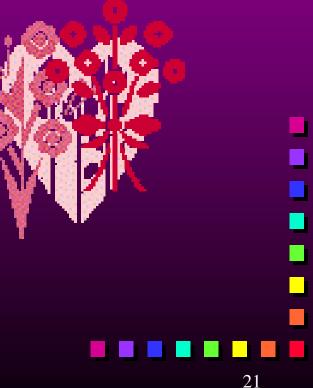
#### **Reality Shock**

Reality shock phases
 Honeymoon
 Shock
 Recovery
 Resolution



#### **Reality Shock - Honeymoon**

Characteristics Everything is wonderful Excited Rose-colored glasses Enthusiastic



#### **Reality Shock - Honeymoon**

Strategies
Take an interest
Help to set realistic expectations
Encourage to ask questions about the history of the organization
Assist to focus on developing a reputation for competence

#### **Reality Shock - Shock**

Characteristics
 Anger, moral outrage
 Frustration, rejection
 Confusion
 Disappointment
 Disillusionment

-
-

#### **Reality Shock - Shock**

#### Strategies

- Be a good listener
- Encourage a look at current learning status
- Focus on the good things
- Create a climate for learning
- It is all right to be a learner
- Prevent feelings of abandonment

#### **Reality Shock - Recovery**

Characteristics
Stress is reduced
Able to grasp the role
Realized the truth; more than one perspective exists
Sense of humor begins to return

#### **Reality Shock - Recovery**

#### Strategies

- Nurture ability to see humor in the situation
- Give positive feedback; share stories about preceptor's own first work experience
- Assist to turn disappointments into learning experiences

#### **Reality Shock - Resolution**

Characteristics
Adjustment

job hopping
returning to school

Bicultural adaptation

Integration of two conflicting value systems

#### **Reality Shock - Resolution**

Strategies

- Assist to evaluate work situation objectively
- Help identify appropriate and obtainable goals

Discuss constructive problem-solving

# Implementing a Program

RolesResponsibilitiesPlan

# 

# Module Two

#### **Role Model**



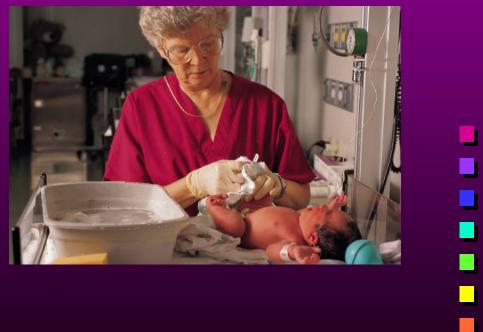
#### Module 2: Role Model

Role Modeling is a process in which an individual identifies with and assumes the values and behaviors of another person that ultimately results in behavior modification that is usually permanent. (Bidwell & Braswell)

Demonstrates by example how competent staff perform their job Attributes include Clarity Consistency Openness Communicativeness Specificity Accessibility

Provides competent patient care.

Examples:





 Maintains current practice.

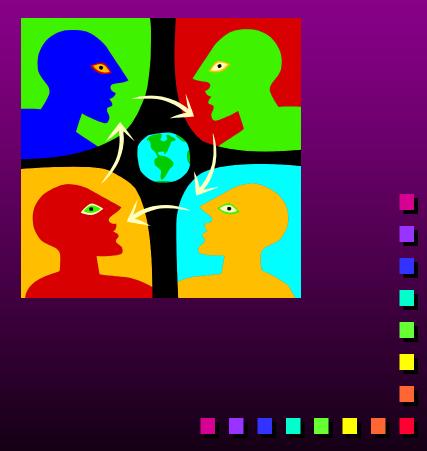
Examples:



Participates in unit governance
 Examples:

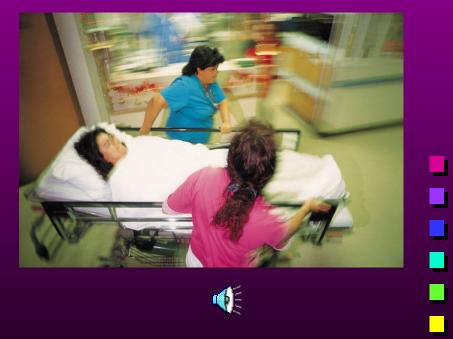


Serves as resource person.
 Examples:



# Role Model

 Maintains effective working relationships with all members of the healthcare team.
 Examples:



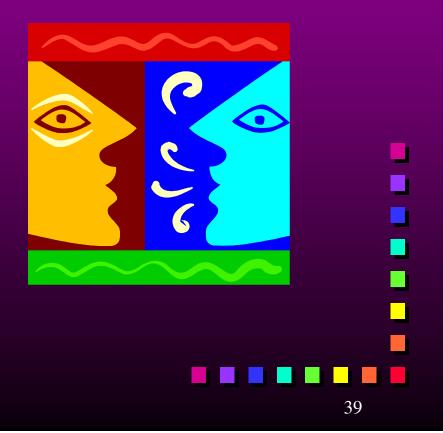
## **Role Model**

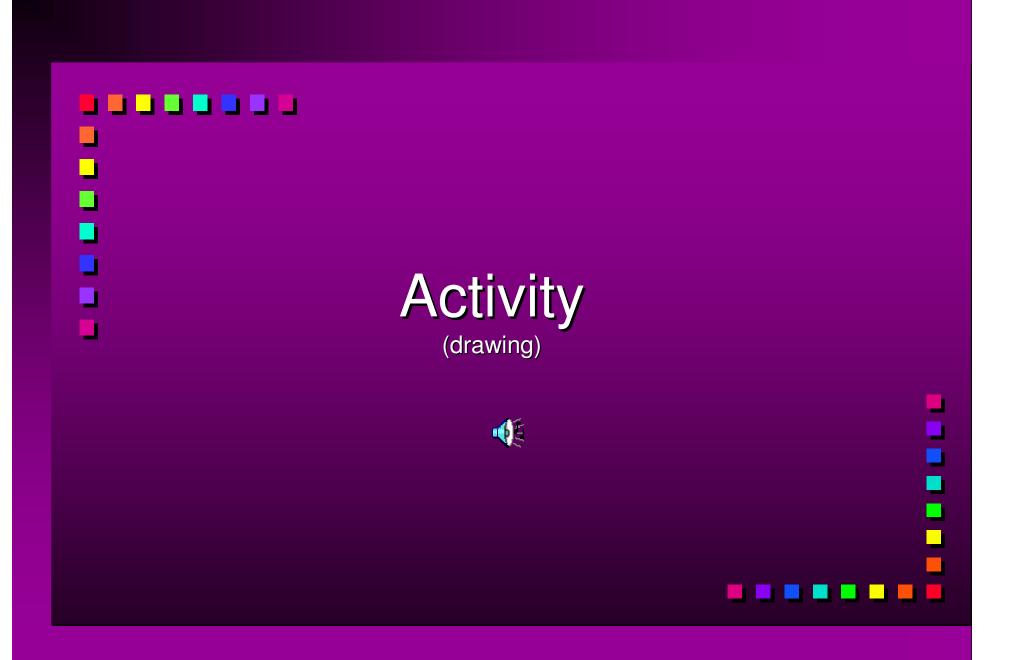
 Demonstrates time management and organizational skills.
 Examples:

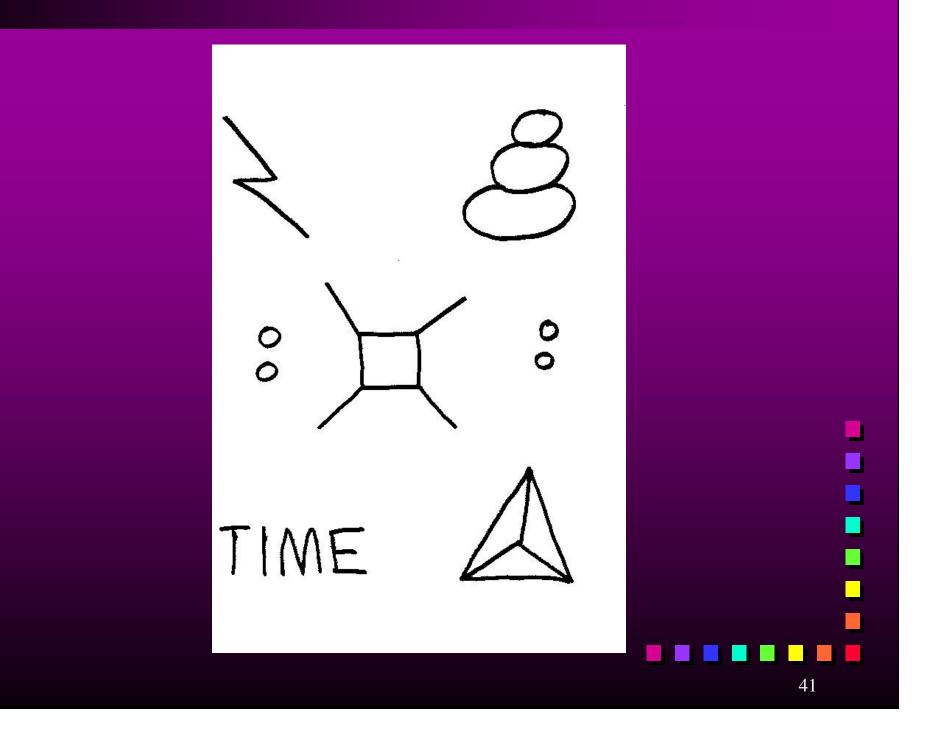


**Role Model** 

Promotes effective communication.
 Example:









#### **Role Modeling Communication**

- Who
- What
- When
- Where
- How
- Why





Modul

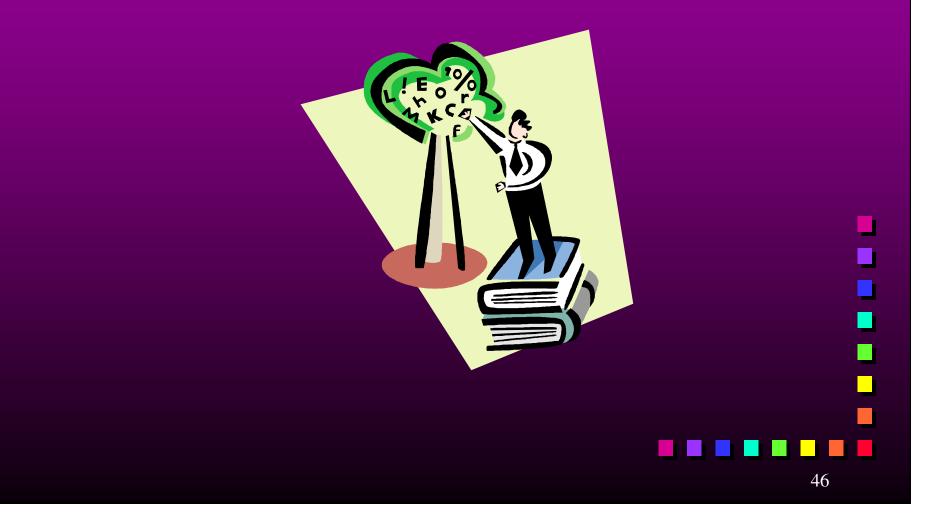
# Module Three

#### Educator



Learning:
A Higher Mental Process
Differs from instinct
Complex
Lots of theories
Still researching.....

# What influences learning?



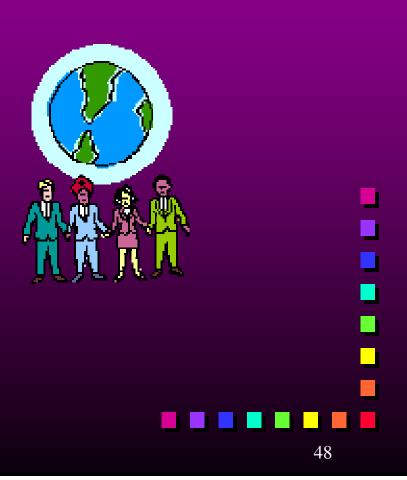
Environment

StressNoiseBusyness



# Culture

GenerationalEthnicGender



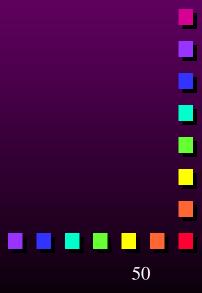
# **Intellectual Ability**





# Primary Language





# Philosophy of Education

Liberal
Progressive
Behaviorist
Humanistic
Radical

# Memory

Learning by association
Learning through contextualism

# **Transfer of Learning**

- Program participants
- Program design and delivery
- Program content
- Changes required to apply learning
  - Resistance to change
  - Activity
- Organizational context
- Community/Societal forces



# **Categories of Learning**

KnowledgeAttitudesSkills



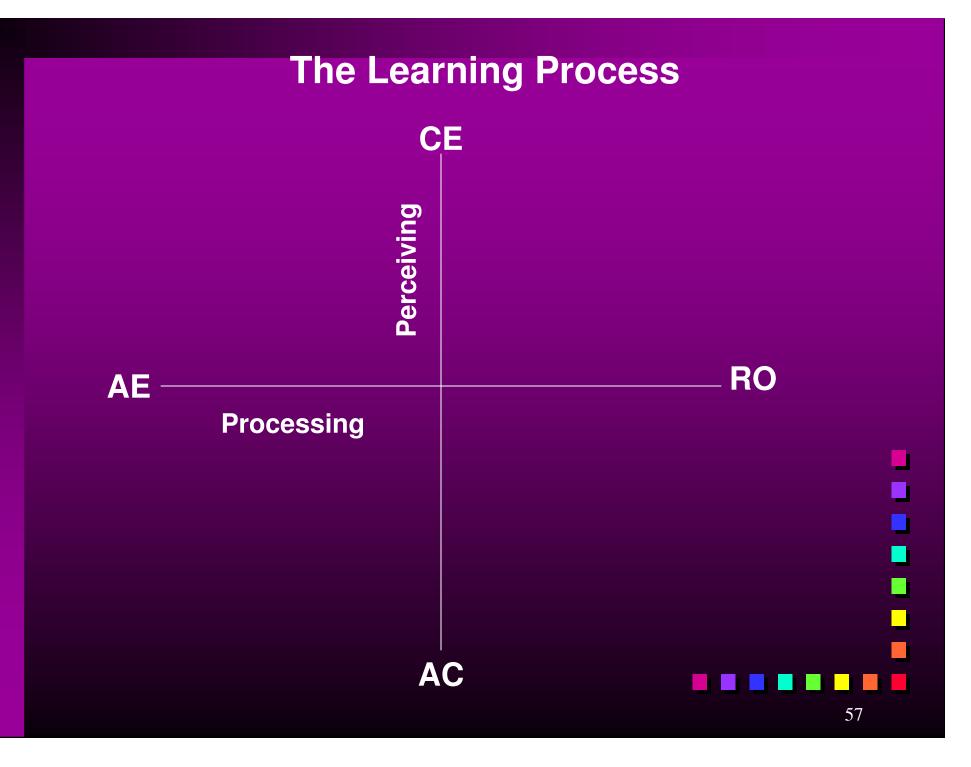


#### Kolb's Learning Style Inventory

- Keep sheet together
- Rate each question
- Don't try to read into the questions
- Go with your first response
- Don't go back
- Press hard to go through to back copy
- Follow directions for scoring

# Ranking

4= most
1=least
3= next most
2= left over



### Learning Styles

Concrete Experience (CE)
 Reflective Observation (RO)
 Abstract Conceptualization (AC)
 Active Experimentation (AE)



# **Concrete Experience**

Learning opportunity
Personal meaning
Why is this important to me?
Feelings important

#### Abstract Conceptualization

Logic & ideas
Systematic planning
Thirst for knowledge
Feelings less important

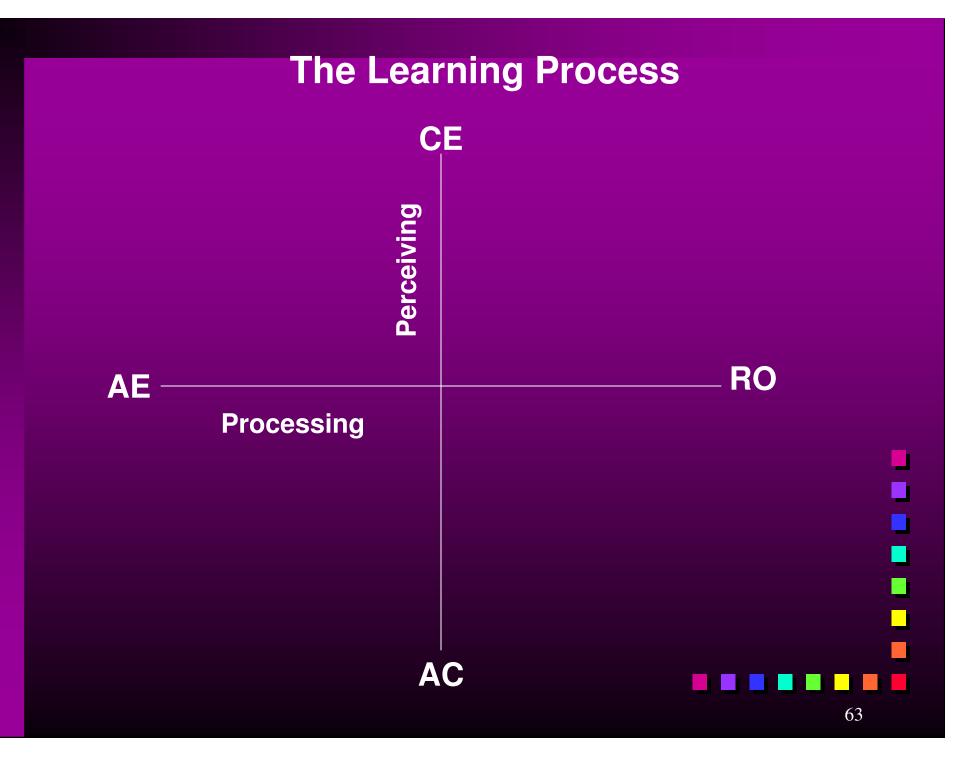
#### **Reflective Observation**

Planning
Mull it over
Need time

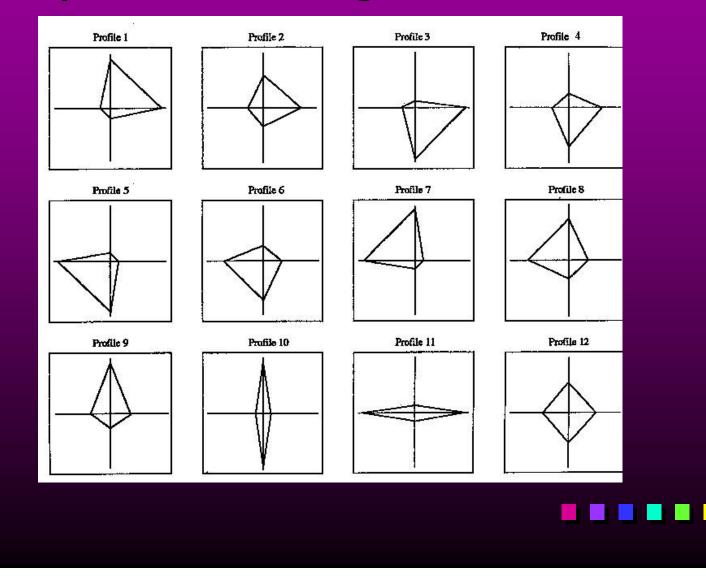
# **Active Experimentation**

Does this work?PracticalHands-on

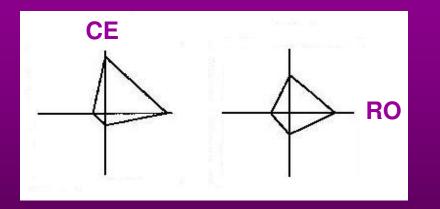




# Sample Learning Profiles



#### Profiles 1 and 2

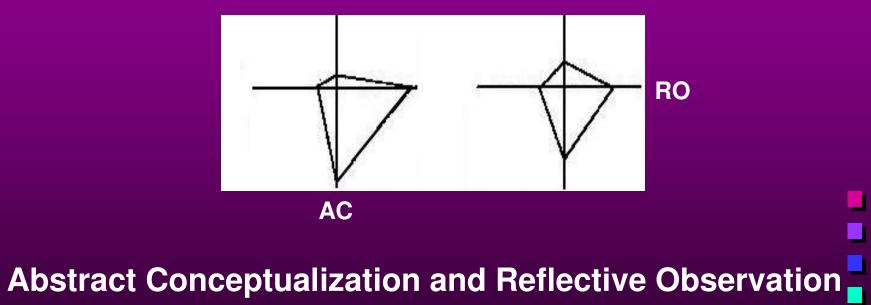


**Concrete Experience and Reflective Observation** 

Reflectors



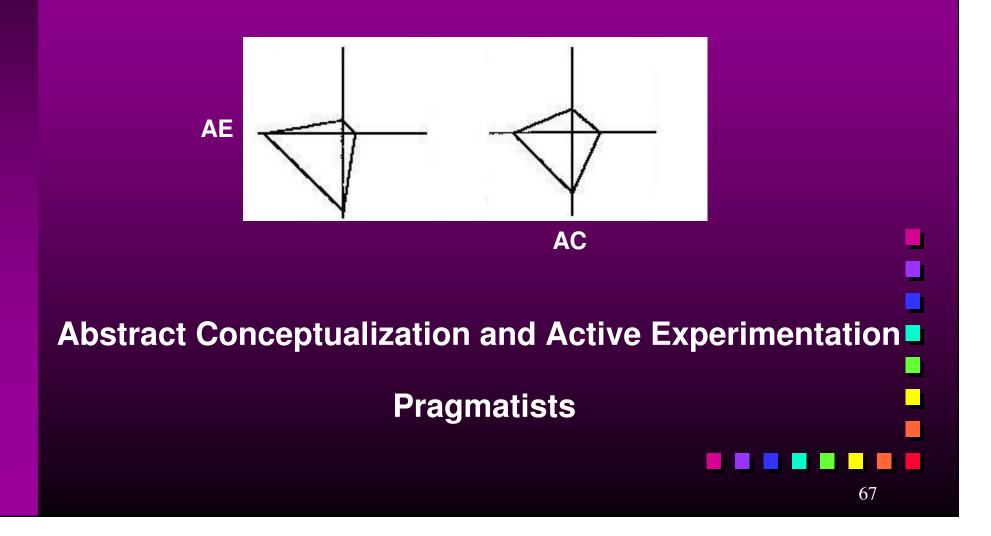
#### Profiles 3 and 4



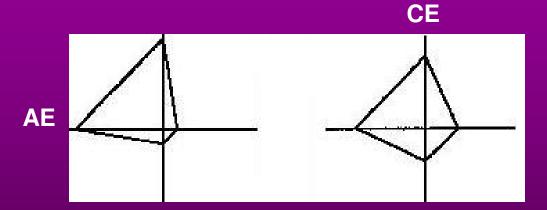
**Theorizers** 



#### Profiles 5 and 6



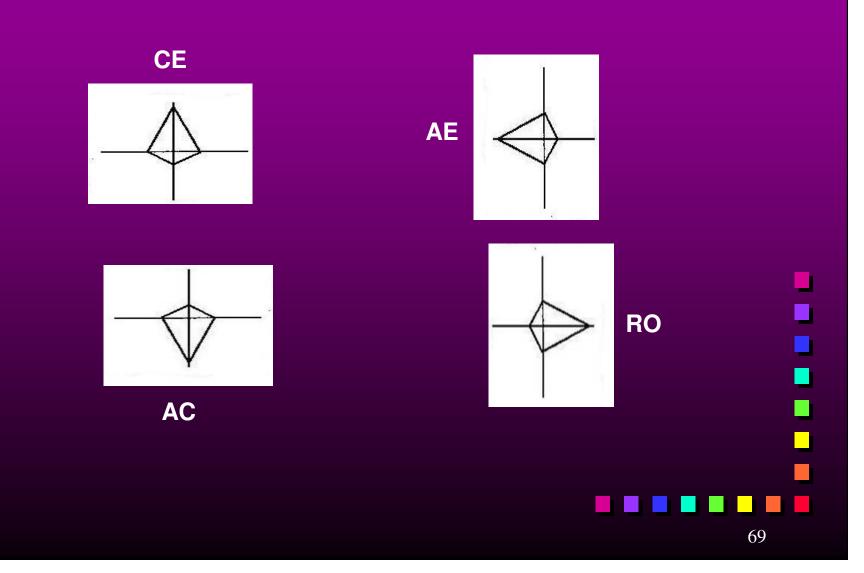
#### Profiles 7 and 8

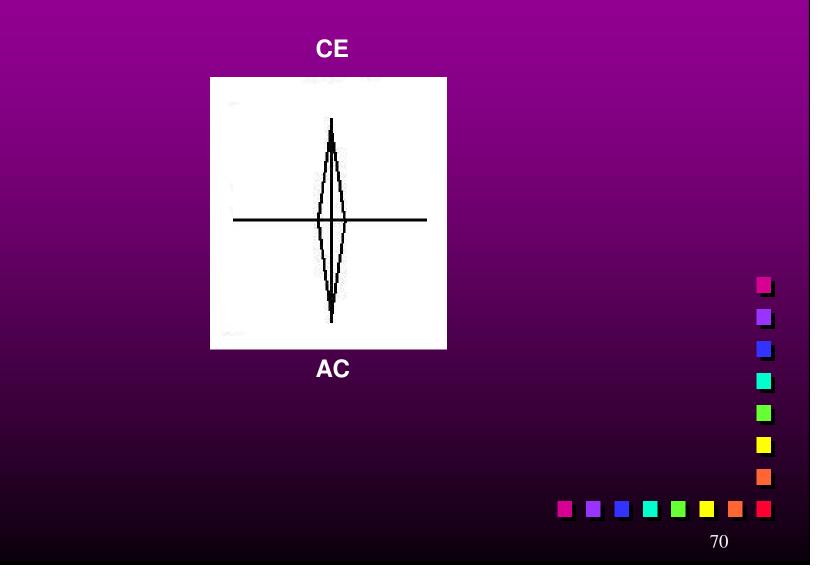


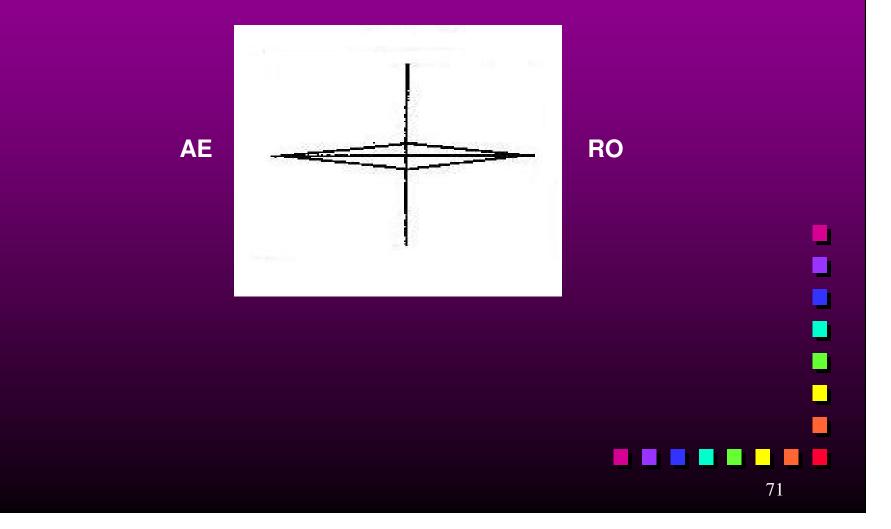
Active Experimentation and Concrete Experience

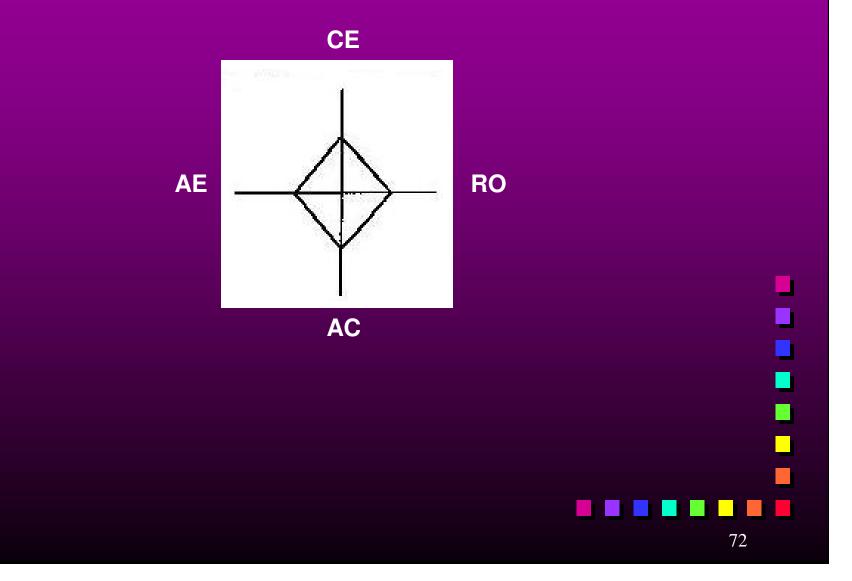
Activists





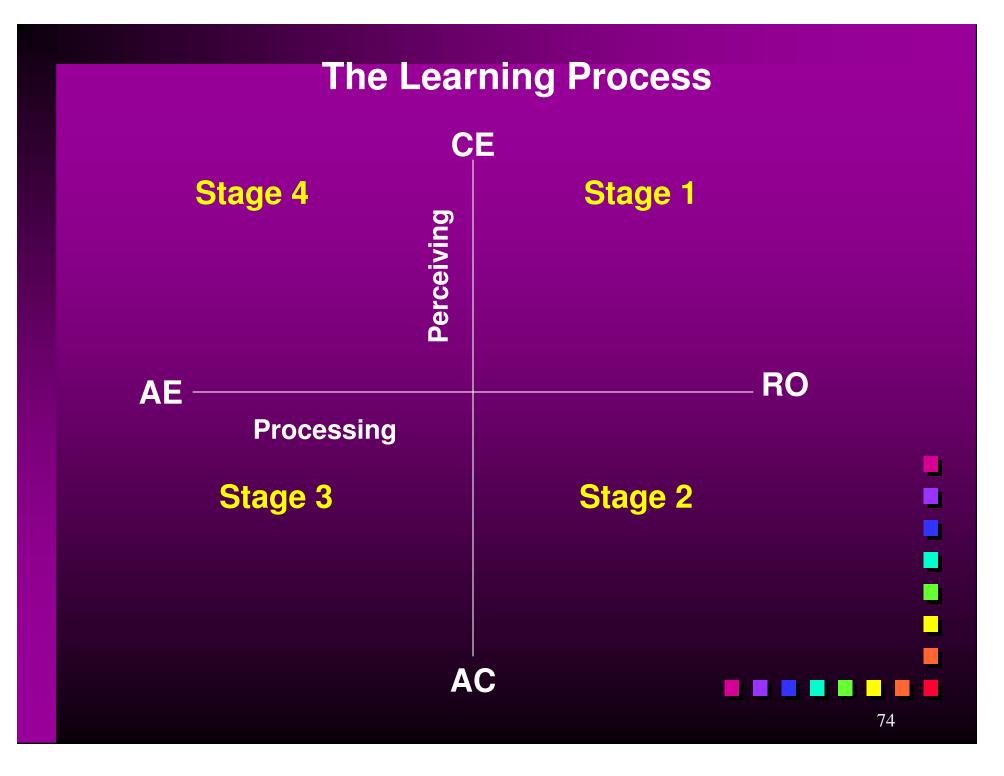






#### **Comparing Learning Styles**

No good or bad, just different
How you learn best
Focus on improving other areas
Respect the differences



Learning Activities Stage 1 Personal Interest Reason for learning Motivation How does it relate to me

# Learning Activities

Stage 2

- Gather important facts
- Direct teaching



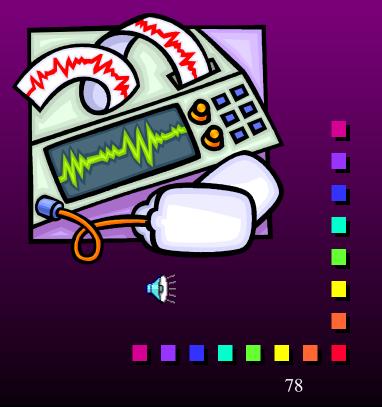
# Learning Activities

 Stage 3
 Using the material
 Hands-on practice
 Experimental
 Action-oriented



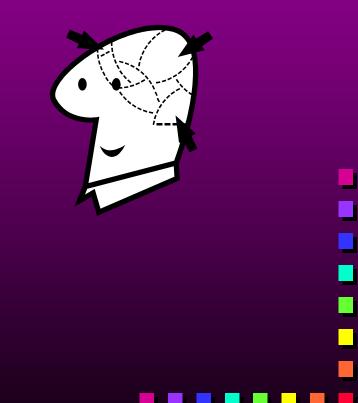
# Learning Activities

Stage 4
 Integration into practice
 Relate to information you already hold



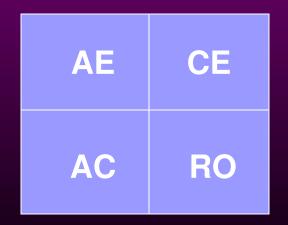
# **Additional Learning Styles**

- Logical/mathematical
- Verbal/linguistic
- Intrapersonal
- Interpersonal
- Visual/spatial
- Body/kinesthetic
- Musical/rhythmic

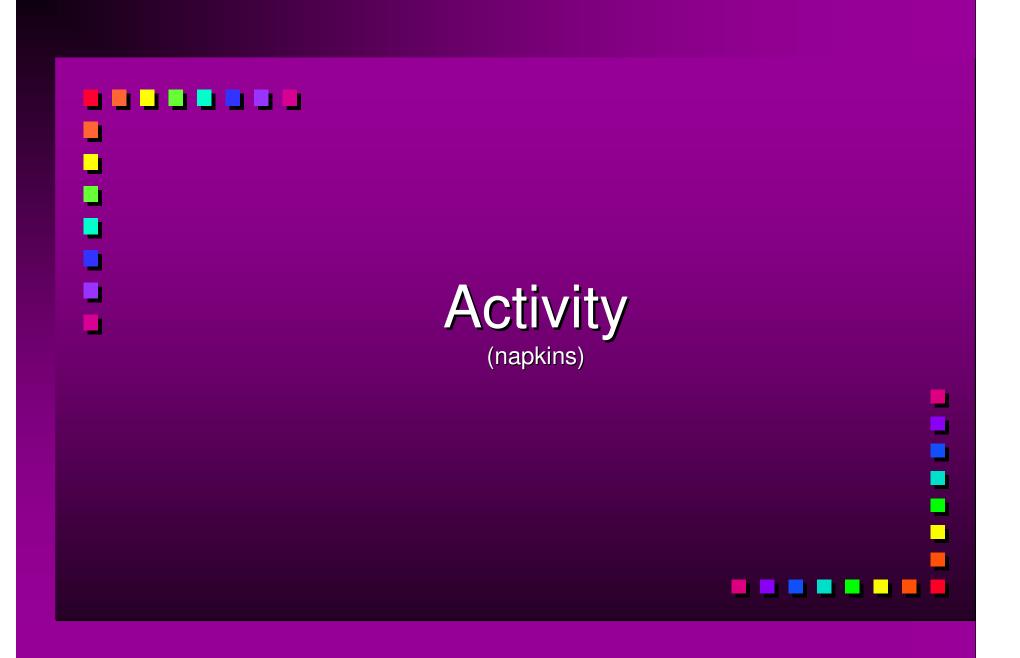


#### **Principles of Adult Learning**

Malcolm Knowles
Learning retention
Relationships to Kolb's work

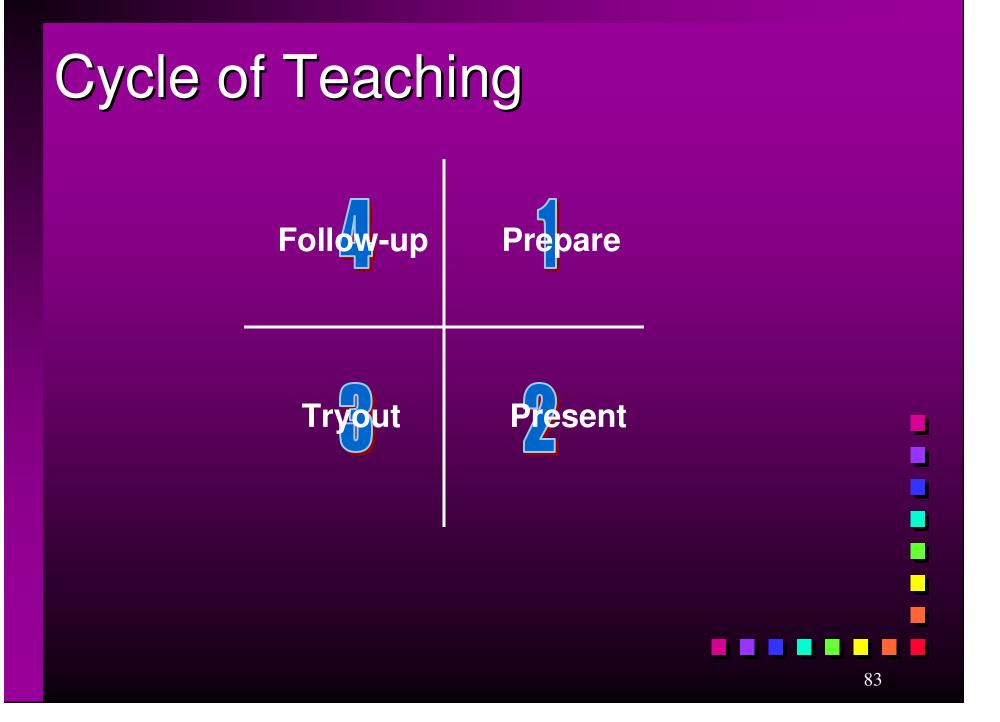






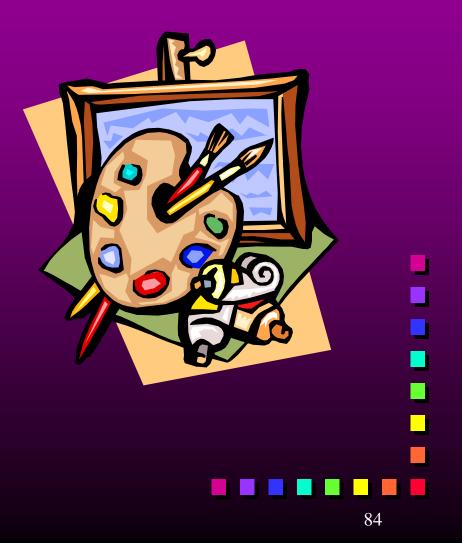
#### **Teaching Psychomotor Skills**

Steps
Prepare
Present
Try-out
Follow-up



# Prepare

 Plan
 Assess readiness
 Motivate



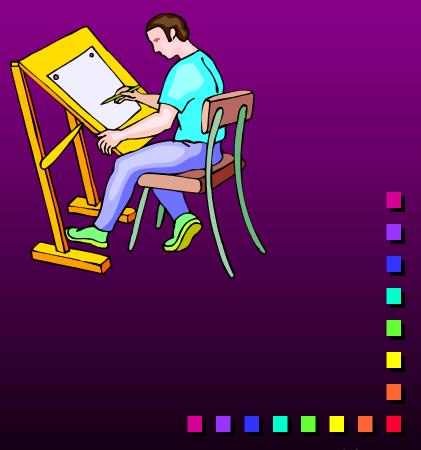
#### Present

Demonstration
 Return demonstration



# Try out

 Trial with cueing by instructor
 Behavior modeling
 Reinforce



#### Follow-up

Encourage questions
Feedback
Model behavior
Taper off
Evaluate



# **Psychomotor Skills**

Effective methods in teaching
Be prepared
Motivate
Create safe learning environment
Develop a trusting relationship with preceptee



#### Determining Learning Needs

Current level of performance Identify what needs to be learned Prioritize Needs High risk/high frequency Mandated Learning needs mutually agreed-upon



#### Levels of Competency

Novice
Advanced beginner
Competent
Proficient
Expert

# **Selecting Teaching Methods**

#### Knowledge





Skills



Knowledge	Attitudes	Skills	Kolb	Learning Activity
				Reading
				Role play
				Providing patient care
				Practice on Mannequins
				Asking questions

#### Creating a Learning Plan

Who?
What?
When?
Where?
How?
Why?

#### **Goal Setting**

The most important thing about goals is having them.



**Goal Setting** 

PurposeBenefitsBarriers

#### **Goal Characteristics**

Mutual Relevant Positive Realistic Measurable Written Specific



#### Write one positive, realistic, measurable, and obtainable goal you might set for a preceptee in your work setting.

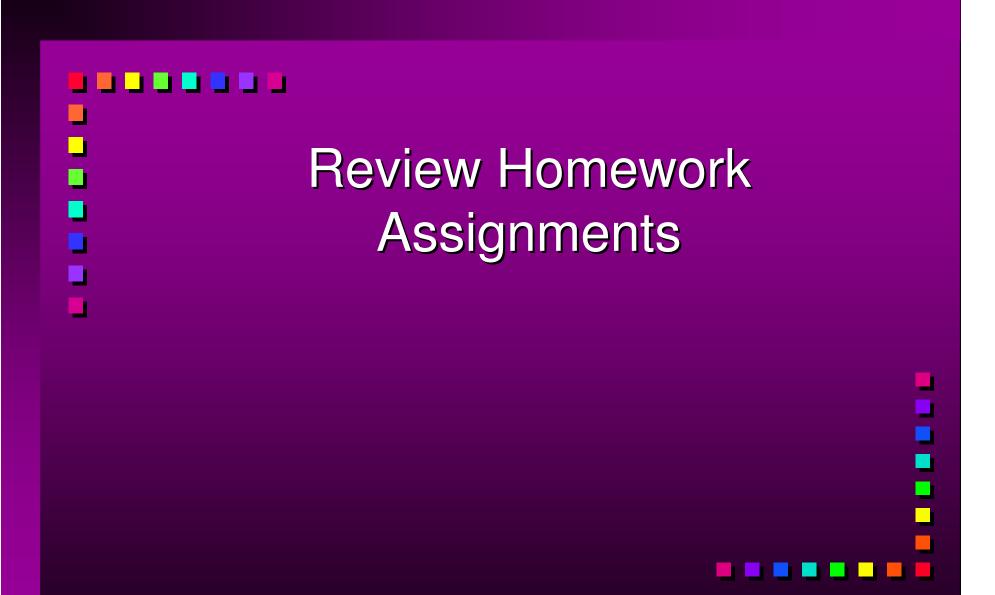
#### **Using Goals**

- Meet with preceptee regularly
- Encourage preceptee to come prepared with a list and self-evaluation
- Limit number of goals
- Do not duplicate competency lists
- Share ideas
- Plan to reevaluate

#### Model Goal Setting

- Long Term Goals
- If you want to do something better, you must do something different that requires a change.
- Letter to self





# **Module Four**

#### Facilitator

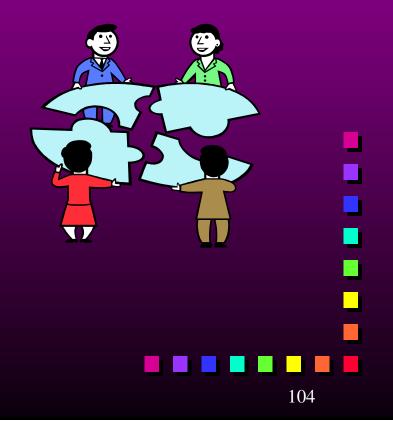


 Familiarize with physical environment
 People tool
 Scavenger hunt



Promote sense of belonging

- Socializing to the unit
- Unwritten rules

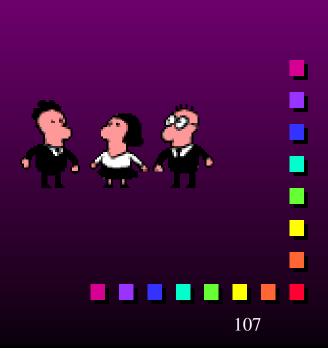


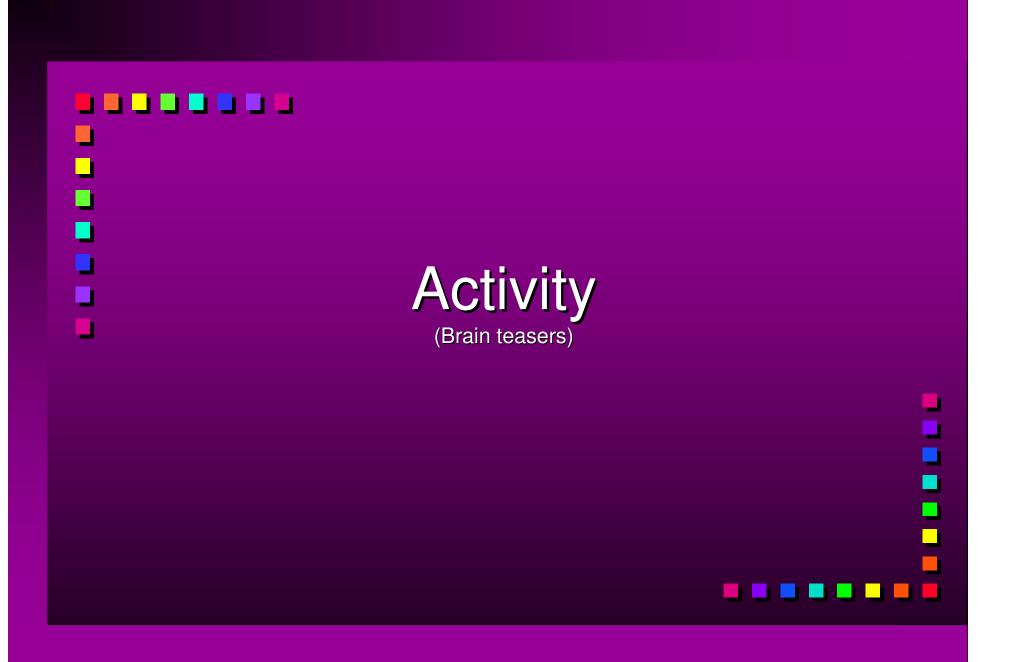
Arranging the Clinical Experience
 Choosing assignments
 Negotiating with staff

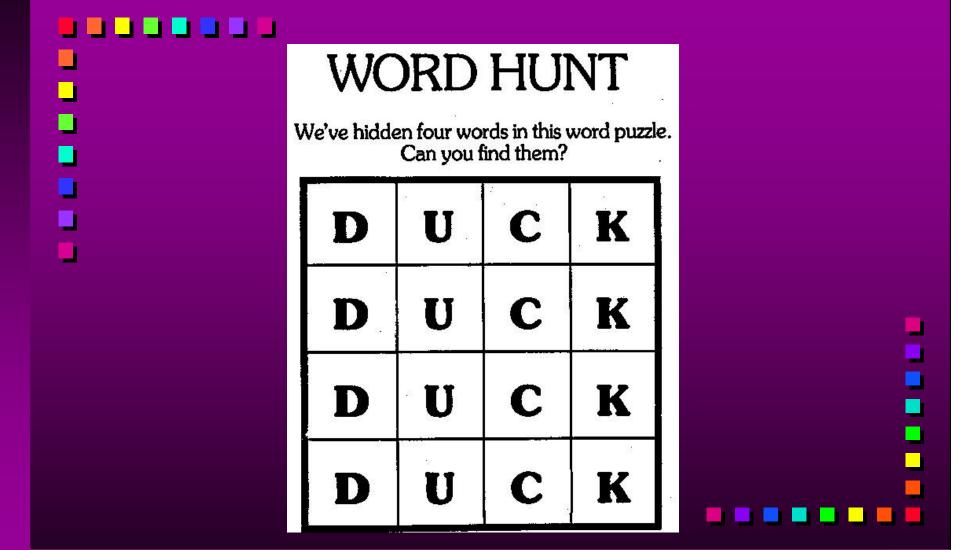


#### A Peacock in the Land of Penguins

- Develop reflective thinkers
- Model a systematic approach to thinking and problem solving
- Foster critical thinking







# Critical Thinking People Are:

- Truth seeking
- Open-minded
- Analytical
- Systematic
- Self-Confident
- Inquisitive
- Mature

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#### **Decision Making**

 A systematic sequential process of choosing among alternatives and putting the choice into action. (W. Lancaster & J. Lancaster, 1982)

## **Decision Making**

Analyzing alternative courses of action, their potential effects, and selecting the best course of action

Implementing the selected action, monitoring the effects and reevaluating the decision in light of the effects

# **Problem Solving**

Problem solving is cognitive processing directed at achieving a goal when no solution method is obvious to the problem solver.
 (Mayer & Wittrock, 1996)



# **Problem Solving**

- Rational, analytical thinking
- An investigative action
- Use of the nursing process
  - Assess
  - Plan
  - Implement
  - Evaluate

# **Critical Thinking**

- A composite of the attitudes, knowledge, and skills. (Watson & Glaser, 1980)
- A process, the goal of which is to make reasonable decisions about what to believe in and what to do. (Ennis, 1996)

# Paul, Binker, Adamson, and Martin (1989)

The art of thinking about your thinking while you are thinking in order to make your thinking better: more clear, more accurate, or more defensible.

#### Critical Thinking Steps Peter Facione 1998

- Interpretation
- Analysis
- Inference
- Explanation
- Evaluation
- Self regulation



#### Interpretation

Components
 Categorizing
 Decoding
 Clarifying meaning

# Interpretation

- Distinguish facts, assumptions, and inferences
- Knowledge component
- Interpret data



#### Interpretation

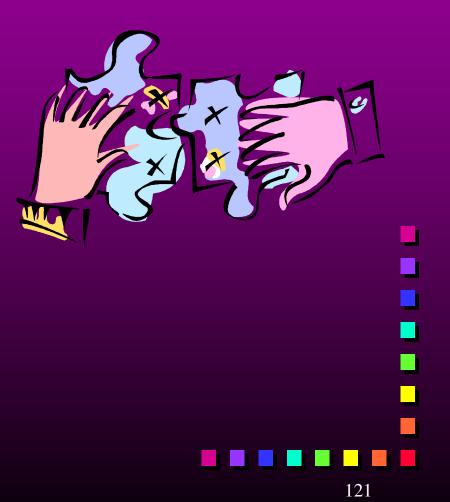
**BP** 160/98 Reports elevated BP Question to ask Tell me what you know about this drug, diagnosis, procedure, treatment?





# Analysis

- Components
  - Prioritizing
  - Making relationships
  - Making connections
  - Defining various courses of action



# Analysis

- Recognize the existence of problems
   Distinguish between relevant and irrelevant information
- Begin to analyze nursing problems and define the possible courses of action

# Analysis

Questions to ask
What lab work would you want to monitor while the patient is on this drug?
What are the elements in the patient's admission assessment findings that relate to the admitting diagnosis?
What should you do first for this patient?

#### Case Study

A MVA patient, age 13, had an open reduction of a right tibial fracture three days ago and is also in pelvic traction. She is complaining of pain in her right leg. She states that her pain level is an 8/10 and that it is worse than yesterday. The patient has Vicodin and MS ordered for pain. The preceptee prepares to medicate the patient with morphine.

#### Inference

 Components
 Drawing conclusions based on evidence/data

> Comprehending the meaning of subjective and objective data



# Inference

- Weighing risks and benefits of various courses of actions
- Identifying gaps in information
- Making sound decisions



#### Inference

- Based on these symptoms, what conclusions can you draw?
- New nurses have a tendency to go for the obvious.

#### Case Study

A MVA patient, age 13, had an open reduction of a right tibial fracture three days ago and is also in pelvic traction. She is complaining of pain in her right leg. She states that her pain level is an 8/10 and that it is worse than yesterday. The patient has Vicodin and MS ordered for pain. The preceptee prepares to medicate the patient with morphine.

 Components
 Explaining
 Providing rationales for conclusions



Explaining in verbal or written format, sound reasons for actions taken or conclusions drawn

Explaining relationships between data

Questions to ask

- Why would you want to do this treatment first?
- Why is this drug not used for this patient when it was prescribed for a patient with the same diagnosis?
- Why is the pain getting worse?

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Why?
So what?
What if?
What's next?



#### Case Study

The patient is admitted for atrial fibrillation, has CHF and is on bed rest. The patient's medications include Heparin SQ bid and Digoxin daily.

In discussing the patient's medications with the preceptee, she tells you that heparin is given because the patient is on bed rest.

#### Evaluation

Components
 Continuously assessing the data for relevancy to the situation
 Ensuring that the data supports the conclusion

# Evaluation

- Questioning the data, signs and symptoms for relevancy
- Evaluating appropriateness of care
- Cost-effectiveness
- Anticipating, thinking ahead
- Looking at the big picture

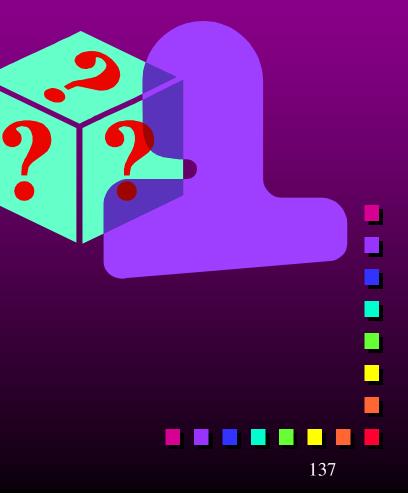




### Evaluation

Questions to ask
 What would indicate to you that this medication has been effective?
 If a patient is developing an infection, what symptoms would you expect to see?

 Components
 Continuously questioning, examining and monitoring one's thinking for accuracy



Asking questions
Comparing and contrasting situations
Seeking further data to support and validate conclusions

Last week you took care of a patient with a similar diagnosis.

What symptoms are the same?What differences do you notice?

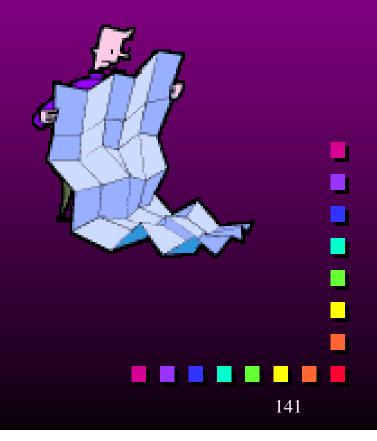
Questions to ask:

- Did an attitude or perception influence my conclusion?
- What is interfering or coloring the way I am looking at this situation?

Am I drawing the wrong conclusion?

Could I be overlooking something?

#### What am I missing?



# Putting It Together

#### Frame the Question

- Use the critical thinking components.
- Pose questions that encourage problem solving.
- Encourage the preceptee to come to you with questions/problems but also possible solutions.
- Why? What if? So what? What now?

#### **Use Case Scenarios**

The physician leaves the following order for the patient who is one day post-op appendectomy:

1. DAT

2. d/c IV fluids when taking fluids well

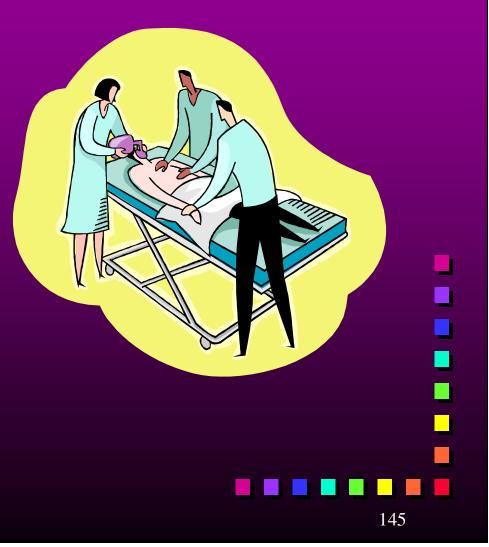
- What are the facts?
- What are the alternatives/choices?
- What other assessments should be made?
- What factors will influence the choice?
- How will know if I made the correct choice?
- What am I overlooking?

### **Build Confidence**

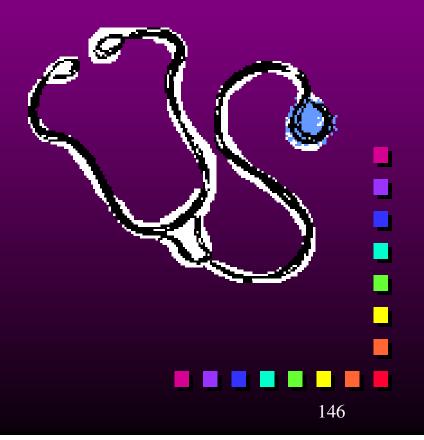
- Give feedback that tells the preceptee that you trust their ability
- "I think you can handle this, but I am right here if you need me."



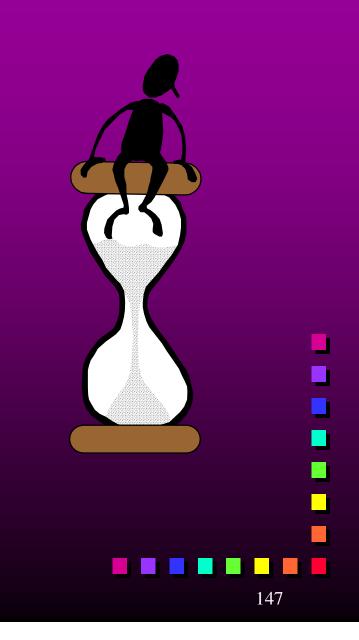
- Acknowledge when the preceptee has made an appropriate decision.
- "I would have done the same thing."
- "I couldn't have done it better."



Validate the preceptee's assessments/findings/ conclusions
 "That's exactly what I heard in the lungs."



- Collaborate with the preceptee in making out assignments.
- "Where do you think we should start today?"



- When setbacks or "bad" days occur, remind preceptee of their progress and successes.
- "Remember the first time you recorded a code how everyone complimented you."



#### **Practice Time**



#### **Conflict - Definition**

When what you have and what you want are different.

A pattern of energy

Nature's primary motivation for change

#### **Conflict Management**

Conflicts for
 Preceptee
 Preceptor
 Staff
 Manager

#### Causes of Conflict

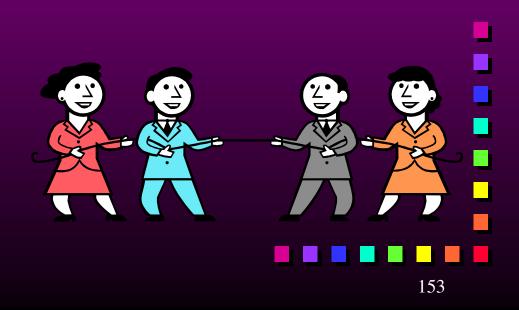
Personality differences
Difference in values
Difference in perspective
Difference in goals
Cultural differences

#### **Conflict Myths**

Conflict is negative

Conflict is a contest

A sign of poor management



#### Conflict Myths (continued)

If left alone, conflict will take care of itself

Conflict must be resolved



#### Activity

Face your partner. Place your hands against the other person's hands. Person One face the screen. Person Two face away from the screen.

#### Person One

When I say "go" push against your partner's hands.

## Change positions so Person Two is now facing the screen.

#### Person Two

#### When I say "Go", push against your partner's hands. Don't back down.

New Directions Person Two

When I say "go" push against your partner's hands.

## Change positions so Person One is now facing the screen.

#### Person One

#### When I say "Go", give no resistance when your partner pushes your hands.

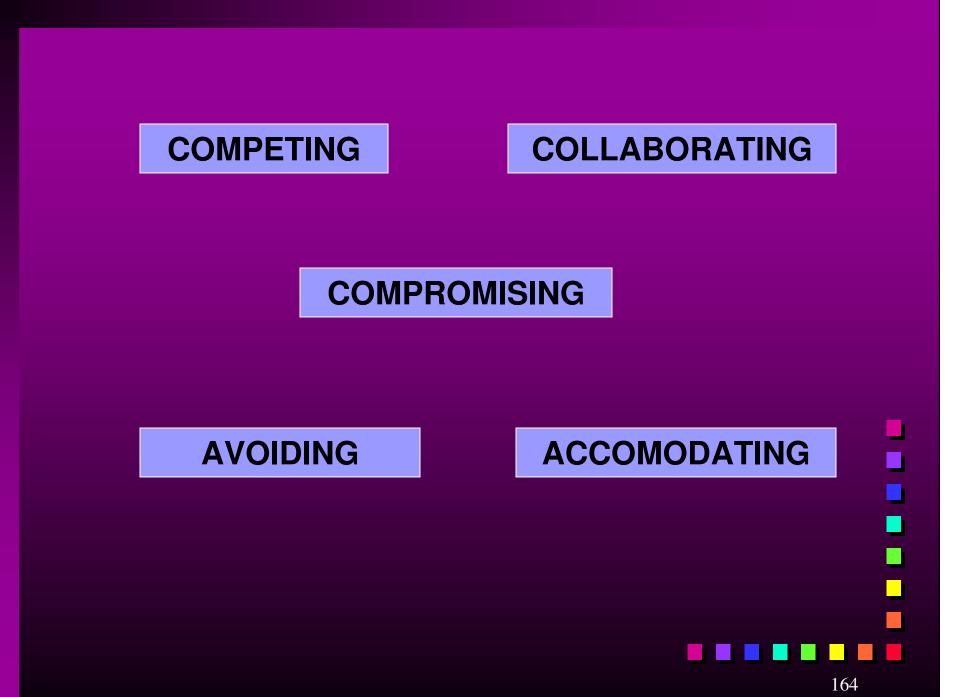
#### **Conflict Mode Instrument**

Consider conflict situations.
How do you usually respond?
If neither response is typical, choose the one you would be more likely to use.



#### **Conflict-Handling Modes**

Competing
Collaborating
Compromising
Avoiding
Accomodating



#### Competing

 Forcing
 Assertive and uncooperative
 Power-oriented



- Useful for:
  - Standing up for rights
  - Defending an important position
  - Trying to win



#### Accommodating

Smoothing
 Unassertive and cooperative
 Involves self-sacrifice



Useful for:

- Charitable causes/generosity
- Obeying orders
- Yielding to another point of view



#### Avoiding

Withdrawing
 Unassertive and uncooperative
 Does not address conflict



- Useful for:
  - Diplomatic sidestepping
  - Avoiding until a better time
  - Withdrawing form a threatening situation

#### Collaborating

Problem Solving
 Assertive and cooperative
 Seeks to satisfy both sides



- Useful for:
  - Gaining additional insights
  - Avoiding negative competition for resources
  - Solving interpersonal problems



#### Compromising

- Sharing
   Somewhat assertive and somewhat cooperative
  - Solutions are mutually satisfying; acceptable to all

- Useful for:
  - Splitting the difference
  - Making concessions
  - Finding a quick middle-ground position

#### **TKI Profile**

Were you surprised?
Compare with others
No wrong answers
Are there strategies you want to explore?
Which strategies work in which situations?

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## **Module Five**

#### **Evaluator**



#### Evaluation

Observable and measurable
Learning can only be inferred
Change in behavior
Based on standards of performance

#### **Evaluation Process**

Formative evaluation
Summative evaluation
Documentation Tools



#### **Performance Evaluation**

Participative
Using Goals
Long Term Goals

#### Communication is the Key

Body LanguagePerceptions



#### **Effective Communication**

- Who?
- What?
- When?
- Where?
- How?
- Why?







Old Woman...Or Young Girl? hint:The old woman's nose is the young girls chin.





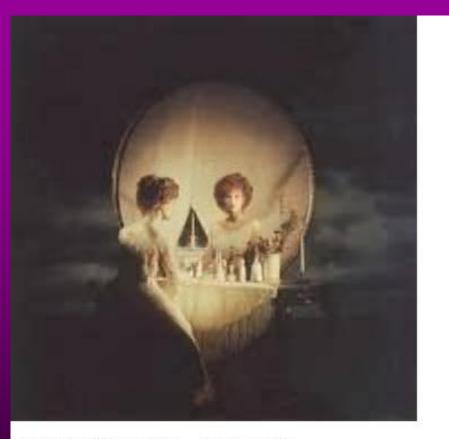
A Face Of A Native American... Or An Eskimo?



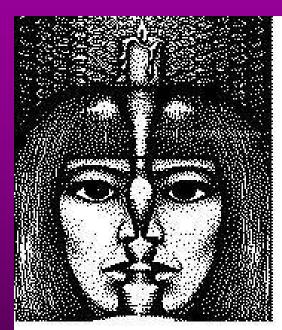


Man Playing Horn... Or Woman Sillhouette? (hint: woman's right eye is the black speck in front of horn handle)

# 



Woman In Vanity... Or Skull? hint: move farther a bit from the screen and blink to see the skull or the woman (looking at the mirror)



Two Faces... Or One?

(hint: two faces side profile…or one face front view)

# **Assertive Communication**

Changing the message:
I think...
I feel...
I want...
I'm concerned that...



# **Coaching the Preceptee**

Definition
Coaching Conversations
Feedback
Problem Solving
Developmental

# **Coaching the Preceptee**

Constructive Feedback
 Provides information to improve performance.

Is a vehicle to promote constructive relationships.

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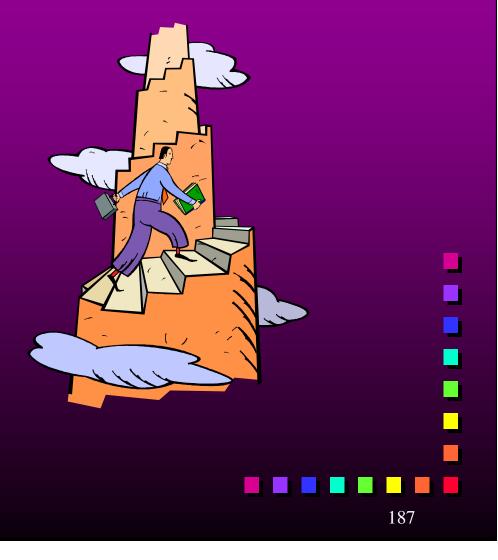
Promotes an environment of openness and mutual respect.

#### **Constructive Feedback**

- Provides a way to monitor how things are going.
- Creates a way for issues to come to the forefront before they become major problems.
- Keeps lines of communication open.
- Assists staff in owning problems and creating solutions.

# **Constructive Feedback Steps**

- EngageEmpathizeEducate
- Enlist



### What to do when....

- Preceptees you might encounter
- Discussion
- Role play



# **Evaluating Performance**

- Satisfactory/Remediation
- Ongoing and written
- Criteria
  - Consistent demonstration
  - Demonstration with minimal prompt
  - Demonstration with repeated prompts

#### **Formative Evaluation**

Ongoing process and documentation
 Weekly updates with preceptee
 Multiple preceptors must communicate
 Written goals and follow-up
 No surprises at end of orientation

# Summative Evaluation Collaboration with Manager

- Meet with manager before preceptorship begins
- Decide what data must be collected.
- Develop methods to collect the data.

# **Final Evaluation**

Manager's responsibility
Clarify preceptor role
Analyze and interpret the data
Write the evaluation report
Share the evaluation results with preceptee

Putting it all together

Tools
Conducting the Program

Focus
Daily tasks (goals)
Evaluate

Documentation

#### **Preceptor Support**

- Ideas for recognition, incentives, rewards
- Resources for preceptors
- Support Groups
- Advanced training

# **Beyond Preceptoring**

Letting go
Mentoring
Changing the relationship
Support rather than judge





