

Chapter 3.

Precepting in Action: Getting Started

A. Assessing the Student's Strengths and Limitations

Assessment is an important first step in working with the student and sets the stage for the ongoing preceptor relationship. It is important that you gain information about the student as a person as well as his/her learning style, attitudes, knowledge and skills. Assessment requires that you ask questions as well as observe student performance and behaviors.

Ask the student to describe themselves as a person: Self-confident? Flexible? Time-driven? Problem-solver? Imaginative? Consider how the student talks about himself. Does he seem to be more of a thinker or a doer? Able to take criticism? How does the student talk about other people? This type of information will help guide selection of resource people and learning opportunities at your agency. For example, if the student lacks confidence and has difficulty articulating answers to what seem basic questions, you may be able to pair her/him up with an employee who can more gradually show them the ropes at your institution. The listing of individual characteristics used in the Preceptor Self-Assessment in Chapter 2 may also prove useful for student assessments.

Next, consider the student's attitudes and values regarding nursing in general, their major in health systems management, the practicum, and the role expectations as a preceptee. Does the student portray an enthusiastic attitude toward the practicum? Is he/she angry regarding the number of hours that will be required? Frustrated by the long commute to your institution? Grateful to be awarded their first choice for a clinical site/ preceptor? Uncomfortable in being placed in an ethnically diverse environment dissimilar to their own? Concerned over feelings of personal inadequacy? Anxious about making mistakes? Appreciative of where this learning experience will lead them along their career trajectory?

As the Indian saying states: "Don't judge any man until you have walked two moons in his moccasins." Listening is of great importance in the initial as well as ongoing precepting experience. No student is the same. Each comes to your setting with a different personality and skill set. One recommended listening technique is called active listening. Additional information on listening skills can be found in Chapter 6.

Active Listening is a technique that enhances and deepens communication. Often as we talk and listen to people our attention either wanders or reflects back to ourselves. We may begin to focus on our own thoughts and ideas. We may think about what we want to say next or advice that we want to give. As this happens, what we hear the other person saying becomes biased by our own ideas and feelings.

When using active listening, you listen carefully to what another person says to you and then repeat the essence of the message back to the person/ student for his/her verification. It provides a way to understand someone else's experiences.

This technique is especially important early in the student/preceptor experience to assure mutual understanding and to avoid erroneous assumptions. Use active listening to help you understand the health, cultural, religious, and professional beliefs of the student. Some of this data will be gradually collected over time as you and the student develop a more trusting relationship.

Tips for being an active listener:

1. Relax and focus on the person who is speaking.
2. Understand the main point that the speaker is making and be able to state it back to them in the most accurate way possible. This can involve restating their own words or expressing what you understand in your own words.
3. Also listen for and reflect the underlying emotions behind the factual statements. This adds depth to communication that is otherwise lost in the mere presentation of facts and details.
4. If you get stuck in the process, go back to the last idea you understood; ask the speaker to repeat something; or ask the speaker to elaborate on something: "Could you say more about..."

Next, assess the student's current knowledge and skill set as it relates to role expectations in this practicum. Where is the student in the graduate program trajectory: First practicum? Last practicum? Has the student completed all the theory courses, or is this an early, shorter practicum being integrated with a specific theory course for mastery of certain skills? What prior administrative experience has the student already had in their own work setting? Where does the student see themselves along their career trajectory?

Determine the student's preferred learning style as discussed in Chapter 3. Ask the faculty whether the student has any specific problem areas you need to be forewarned about. While most preceptors don't want to be biased in their evaluation of the student, sometimes an honest sharing of student's true abilities will only serve to strengthen the learning experience. See Appendix C for an interesting case study about unconscious attitudes and their powerful impact.

Ask whether the graduate program has a list of student competencies you can review. It may include skills such as budgeting, conflict management, motivation/ team building, performance

appraisal, time management, developmental feedback, cost-benefit analysis, implementing change, etc. Is this student a “novice” in these skills? An “advanced beginner”? An “expert”?

The following table highlights characteristics of different levels of practitioners based on Benner’s (1984) use of the Dreyfus Model of decision-making. Although derived from the clinical, often critical care setting, much of the content can be very relevant for the managerial arena. In assessing students, realize that while they may be competent in some skills and activities in their own work setting (e.g., reading a financial report), they may not be able to transfer this competence to a new setting. If the student is a novice in a specific skill, then you need to focus on the characteristics of the student at the corresponding stage and plan appropriate learning experiences to match their decision making ability.

Novice	<ul style="list-style-type: none"> - Relies on abstract principles instead of past experience. - Practices by the rules learned. - Doesn’t know when an exception to the rule is relevant.
Advanced Beginner	<ul style="list-style-type: none"> - Has some minimal past experience to draw from - Has global, not specific experience - Doesn’t recognize differential differences - Takes in little of the situation - Concentrates on the task at hand and remembering the rules.
Competent Nurse	<ul style="list-style-type: none"> - Can identify which aspects of the task are important and which can be ignored - Is organized - Knows what needs to be done - Sees their actions in terms of long-range goals.
Proficient Nurse	<ul style="list-style-type: none"> - Sees the situation as a whole, not focusing on the parts. - Has holistic understanding that facilitated decision-making - Learns best with case studies. If you present context-free situations, will focus on exceptions to the rules.
Expert Nurse	<ul style="list-style-type: none"> - Has an intuitive grasp of the situation - Zeroes in on the accurate range of the problem - Has difficulty articulating rationale for interventions; May just know “I’m right”

Finally, request that students bring you a copy of their resume. This will provide some information into previous on-the-job experiences. Be sure to probe deeper into what they like/ dislike most about their current job, and what opportunities they have had for handling a particular problem or situation.

Preceptors should also consider where they fall along the Novice→ Expert continuum. Although managers/leaders are often sought out to be preceptors based on their administrative “expertise”, this skill does not always translate into being an expert at student/staff precepting. For example, administrators who have created their own unique culture and environment within the agency may be frustrated and unable to relate to an “outsider” with different values and belief system. Managers may be excellent at providing formative and summative evaluation, but be unable to foster critical thinking in an inexperienced student. Leaders who are used to confidently delegating projects and assignments to a competent team can find it too difficult to slow down to work with a student who needs direction at every step. Being aware that precepting can require a new skill set was the impetus behind the development of this book.

B. Setting Realistic Objectives

“A creative mind can withstand any amount of bad training.” This was Anna Freud’s way of saying that capable students will find a way to learn despite instructional errors or neglect. Even without planning, the student will learn by participating with you in your practice. But, to optimize the effectiveness and efficiency of the precepting experience, you need a plan. Otherwise time will get away from you and you will fail to capitalize upon learning opportunities.

The student comes to you with objectives to accomplish and will collaborate with you to formulate additional objectives. These objectives form the basis of your precepting plan. Objectives specify at what level the student will perform at the conclusion of the practicum. Objectives may also be called learning outcomes. Broad, general objectives are sometimes referred to as goals.

Review the course objectives with the faculty member and the student. Course objectives are quite broad in scope. Assure that you share a mutual understanding of the meaning of the objectives and the expectations for accomplishing each one. Objectives may also contain certain conditions and standards for performance, such as time frames, reference materials to be used, or other criteria.

In addition to the objectives for the course the student is usually required to formulate a few personal objectives, subject to approval of the faculty member and the preceptor. You and the student will refine these objectives which are specific to the student’s goals for the learning experience and the opportunities available in your setting. Guide the student toward objectives that are realistic given the time frame of the course, the opportunities available and the resources required. The student may have to reconsider his/her personal objectives if certain experiences are available only on days when the student is not there. You may guide the student toward incorporating some of your current projects into his/her objectives. Leave room for flexibility in setting objectives. Be aware that priorities may change over the duration of the experience.

C. The Planning Meeting

Often the student and preceptor have exchanged preliminary objectives by e-mail or telephone prior to a first face-to-face meeting. Once you and the student have agreed upon the overall objectives for the practicum, schedule a planning meeting with the student (and possibly the faculty).

- The goal of this first meeting is to mutually agree upon a realistic, workable plan to accomplish the objectives. Most initial objectives have to be customized to the learner, the time frame and the setting.
- Prepare for the meeting by assuring that you know the inclusive dates of the practicum and what days and hours the student will spend with you.
- If you anticipate a particularly valuable learning opportunity at a time when the student is not scheduled with you, can you substitute that time for another scheduled time?
- Does the faculty member expect you to schedule a make-up time in the event that the student is absent due to illness?
- Assure that you and the student have planned each day's experience to contribute to accomplishing an objective. This may require some flexibility as the practicum evolves.
- Determine how you will plan for time when the student is scheduled with you but you are unavailable due to other professional commitments or unanticipated absence from work.
- Clarify expected work behaviors: dress code, attendance/ call in, confidentiality issues, relationships with other personnel in the agency, and your communications with and from the student.
- Clarify any additional course requirements expected of the student: a special project or completion of competency checklist. Bi-weekly/ monthly project management memos documenting the practicum experience are commonly required in management courses.

D. Identifying Projects for Students to Undertake

The faculty member will provide guidance in the selection of student projects. However, you may prefer suggesting that the student team up on one of your personal projects, or take a section of a larger project to develop more independently. The ideal project is one which is scope and time appropriate; is needed by the agency; provides the student a challenging learning experience; has high likelihood of successful completion; and on which the student can work independently. Some typical general topics may include:

- Performing a needs assessment for one component/function of an information system.
- Develop a marketing plan to promulgate a healthcare product, program, or service using culturally appropriate marketing tools.
- Analyze a health policy in terms of the social, economic, legal and political forces which effect current and latent health outcomes.
- Perform a cost-benefit analysis.
- Analyze methods by which to evaluate patient outcomes of case management.
- Design a program monitoring system.
- Develop a model for a prototype decision support system for a healthcare problem.

- Prepare a teaching plan for staff using a new information system (and/or implement and/or evaluate).
- Plan a CQI project.

Following are more specific examples of projects that have been used in a variety of settings.

<u>Possible Student Projects</u>
<ul style="list-style-type: none"> a. Evaluation of hardware requirements and placement in physician practice sites (Tertiary care setting) b. Perform a needs assessment on a neighborhood smoking cessation program (State health department). c. Design an instructional packet and strategic plan to implement an Executive Coaching Product (Company) d. Compare and contrast models of asthma management (School-site) e. Perform a needs assessment and curriculum revision for a current EMS certification program (Tertiary care setting) f. Complete assessment of computer learning needs in a peri-operative environment (Tertiary care setting) g. Complete a case study of disaster nursing for implementation in Illinois: A feasibility project (Public health dept) h. Create recommendations to improve documentation systems to more accurately reflect nursing critical thinking and decision-making in hospice nursing (Community setting) i. Conduct feasibility study for acupuncture treatment program (Primary care site) j. Design a quality monitoring project to develop a process to mentor nurses on early ambulation post CABG (Tertiary setting) k. Determine cost-effectiveness of a Parish Nursing Program (Community agency)

E. Negotiating the Agency's Environment

Each organization operates within its own environment on several levels: the buildings and facilities that define the workplace, the patterns of work and communication that make up the work behaviors, and the values and beliefs which provide the organization's sense of identity and mission. The student as an outsider to your agency will need help in navigating through these various levels. Begin with the basics: a place to put their coats and purses. Will they share office space with you or an employee? How do they obtain an appropriate ID? Will they be able to have access to the computers? The library or resource area? Is there a place to store lunches? Do staff eat in a certain place and at a special time? How can you be paged or reached when needed? Is there a back up person to use when you are unavailable?

Often students have had work experience in only one type of setting (e.g., primary or tertiary care), and now the faculty member has selected a new site because of the rich and varied experiences it

offers (e.g., school-based clinic, state health department). Sometimes differences in core values and beliefs between the student and the organization can pose the biggest challenge. Your job is not to change the student's beliefs, but to guide him/her in understanding the mission and culture of your agency, and how the student can best learn in this "different" environment. Development of trust, honest communication, and mutual respect are necessary for achievement of learning goals.

In order for the student to develop all aspects of the role, he/she needs exposure to and experience with the political as well as the professional forces at work in your setting. This includes the various levels of management, administration, finance and other disciplines that impact your role. Share the organizational chart and how it relates to your areas of responsibility. Plan to interact with a variety of disciplines during the time the student is with you. Role model important behaviors before expecting students to try out these behaviors. Later, when appropriate, empower the student to act in your behalf with members of other disciplines. Assure that the student receives a balanced view of the interdisciplinary interaction and collaboration which your role requires.

Confidentiality issues must be clearly addressed. This relates to access to patient/clients records, employee issues, hospital specific policies and procedures, performance outcomes, innovative ideas/projects being developed, as well as to information discussed at administrative meetings. Depending on your setting, it may be appropriate to have students sign a confidentiality statement prior to starting their practicum. Also discuss this issue with faculty. Give clear directions to students as to how you expect them to handle information during a meeting. You may have discussed some perplexing situations facing you or the institution that you do not want shared within, let alone outside the agency. Be clear as to the boundaries of what is confidential and what can be shared with colleagues and faculty. Almost every student is expected to keep a journal or log of their practica experiences. Clarify for them how much detail is appropriate to record and what is "off limits". Finally, anticipate ahead of time how you want the student to navigate throughout the institution. Do you want to make each contact for them, or do you want them to interact more independently? Clear instruction at the start of the practicum can make this a positive experience for the student, the preceptor and the institution.

F. Role Modeling Opportunities

One of the most valuable aspects of precepting is the student learning achieved through your role modeling. Students will learn from your role modeling whether or not you purposefully present yourself as a role model. Initially, just allow the student to shadow you to get a clear picture of your role, and to become familiar with the language and special terms used in this setting. Two of the most significant aspects of learning accomplished through role modeling are critical thinking and professional role behavior in interaction with staff, patients, interdisciplinary colleagues and others.



Your thinking is invisible—just as the student's thought process is invisible unless you ask for responses that call for the student to describe his/her thinking. Make your thinking visible to teach clinical judgment. Think-out-loud whenever appropriate. This is not always a natural activity, and you may have to challenge yourself to formulate a description of your thought process. In some settings it may be inappropriate to discuss your thought processes "on the spot". In those situations,

alert the student in advance to attend to particular critical features of your behavior. Afterward, ask the student questions about her/his observations and ask the student to interpret your rationale. This approach is a version of a “pop quiz” on thinking-out-loud. Let the student see the consequences of your actions. Seeing your favorable outcomes and tying them to specific actions focuses the student’s attention and motivates.

Share with students some of your “war stories” of valuable lessons learned from prior mistakes. Using an occasional, “I learned this the hard way when…” approach to teaching is a variety of role modeling. Students may have a greater willingness to approach you with their uncertainties if they perceive that you have a tolerance for error. Also consider taking students to professional nurse administrator/informatics meetings (local, state, national) wherein they can again see you model your leadership abilities.

Some sample role model behaviors that may be valuable in the management setting include:

- Attends meetings on time and well-prepared.
- Displays open, direct communication style.
- Maintains appropriate accessibility.
- Uses active listening when employees express a concern.
- Interacts with other disciplines in a confident manner.
- Displays effective group dynamic skills.
- Viewed as a strong advocate for staff.
- Responds to issues in a timely manner.
- Collaborates within and across departments as appropriate.
- Introduces yourself to all members in the room.
- Dresses appropriately and conducts self professionally.
- Demonstrates a caring attitude to the team.
- Appears to have the respect of the institutional staff.
- Encourages discussion and acceptance of conflicting view points.
- Demonstrates accountability for own actions.
- Demonstrates ability to delegate projects and responsibilities.
- Maintains confidentiality as appropriate.

G. Fostering Critical Thinking

A Delphi study of critical thinking in nursing (Rubenfield and Scheffer, 1998) identified skills, and attitudes or orientations that describe critical thinking in nursing practice. Skills include: analyzing, applying standards, discrimination, information seeking, logical reasoning, predicting, and transforming knowledge. Attitudes include: confidence, contextual perspective, creativity, flexibility, inquisitiveness, intuition, open-mindedness, perseverance, and reflection.

Ford and Profetto-McGrath (1994) suggest that when we encounter a situation/ problem, we reflect critically on our knowledge base. This reflection guides us to select and incorporate other pieces of information in the situation. For example, when you approach a unit problem, you choose to collect particular assessment data, based on your education and previous experience. Further reflection upon this knowledge will lead you to select and implement action. Reflecting on the effectiveness or ineffectiveness of actions you took leads to new knowledge that will direct you to continue your chosen approach with the staff, or cause you to modify your approach. In the process

you have added to the knowledge which you will incorporate into future encounters. As preceptor, reflect on your management of particular problems/ situations (e.g., physician verbal abuse complaints, medication errors) and identify relevant questions you can pose to students to guide them in the process of critical reflection.

Knowledge <-----> Critical Reflection <-----> Action

The questions that you ask display your own critical thinking. They demonstrate the most important areas to consider and students quickly learn priorities from the aspects that you choose to question. Create a climate of curiosity and questioning. Require that the student do a critical appraisal of a project/ issue from time to time. When more than one strategy seems plausible, require the student to review pertinent current research to justify one choice over another for that particular situation. Provide appropriate feedback.

The following box suggests sample questions that facilitate critical thinking.

1. How does ___ relate to?
2. What do you predict will happen?
3. Given these results, how will you change your plan?
4. How will you prioritize?
5. How can you improve upon?
6. How will you evaluate this project?
7. How will you validate your assumptions?
8. What other alternative might work?
9. Distinguish between
10. What else could be causing....?
11. Why is a better choice than that one?
12. What would you cite to support your actions?
13. What are you assuming?
14. What other perspectives do you need to consider?
15. How will you determine the effectiveness of....?

For more on asking powerful questions, refer to Chapter 6.

H. Teaching as Reflection-in Action

The concept of teaching as reflection-in-action refers to the preceptor thinking about the teaching/learning process or problem solving teaching/learning situations while directly engaged in teaching. You demonstrate effective reflection-in-action when you change your teaching approach after recognizing that your approach is not working. That may sound obvious, and yet many teachers and preceptors keep plugging away with the same approaches even though they are not satisfied with the results—an echo of that popular saying, “If you continue to do what you have always done, you will continue to get the same results you have always obtained.”

Seek feedback from the student frequently, not by asking questions that can be answered by “yes” or “no”, such as “Did you get that?” or “Do you understand?” Instead, ask the student to tell you what he/she got out of an explanation or ask, “What did you think was most important in what I just told you?” or “If you had to summarize this plan in 60 seconds, what would you say?” This is especially important in meeting situations. A post meeting “debriefing” where you and the student can share perceptions and you can address any misperceptions is an excellent learning device. Often, in situations where you are leading a meeting, or a part of the agenda, a pre-meeting discussion of your goals/plans for the meeting is very helpful and allows the student to have increased insight as the meeting evolves.

Validate frequently your perception that your present approach is (or is not) working. Recall that students do learn differently and may benefit from different styles depending upon their level of development.

I. Strategies for Keeping on Track with Objectives

Learn to perceive your setting with a view toward learning opportunities for the student. Filter your perceptions considering the student’s objectives and the unique opportunities and events that may arise that you could not predict or incorporate into your initial plan for precepting. When you begin each day with the student, overview the day as you expect it to unfold. If you and the student decide to pursue some unforeseen learning opportunities, give the student responsibility for incorporating the activities originally planned into future plans. Remember, flexibility is an important key to precepting success.

Incorporate into your plan a means of monitoring progress. Require the student to reflect for a few minutes at the end of each day’s experience. This short review will help with keeping on track with objectives. Ask the student to identify:

- What was learned today
- What he/she plans to learn during the next scheduled experience
- How he/she will prepare for the next experience.

Revise your plan on an ongoing basis as you assess student’s progress. You may discover that the student is progressing faster than expected. This will allow you to reallocate time to other objectives and experiences. Consider the use of project memos to the student for providing feedback on achievement of course and personal objectives.