**Chapter 1**

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| Preceptor Development Plan: Preceptor Roles | | | |
| Think about each of the roles of a preceptor. What are your strengths in each role? In which areas do you need to increase your knowledge and expertise? What is your plan for expanding your knowledge and expertise? What resources are available? Who can help you? | | | |
| **Name:** | | | |
| **Date:** | | | |
| **Role: Teacher/Coach** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Role: Leader/Influencer** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Role: Facilitator** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Role: Evaluator** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Role: Socialization Agent** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Role: Protector** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Role: Role Model** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |

**Chapter 2**

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| **Preceptor Development Plan: Learning** | |
| Think about the learning theories and styles described in this chapter. How are the theories and styles applicable in your precepting role? Also, think about how you learn best. | |
| **Name:** | |
| **Date:** | |
| **Learning Theories** | |
| **Learning Theory** | **How is the theory applicable in your precepting role? What are the key points you need to remember?** |
| Adult Learning Theory |  |
| Social Learning Theory |  |
| Hierarchy of Needs Theory |  |
| Experiential Learning Theory |  |
| Transformative Learning Theory |  |
| Novice to Expert Theory |  |
| **Learning Stages** | |
| **Learning Stage** | **How is the stage applicable in your precepting role? What are the key points you need to remember?** |
| Dissonance |  |
| Refinement |  |
| Organization |  |
| Feedback |  |
| Consolidation |  |
| **Learning Styles** | |
| **Learning Style** | **How is the style applicable in your precepting role? What are the key points you need to remember?** |
| Gregorc Learning Styles |  |
| Myer-Briggs |  |
| Field Dependence/Independence |  |
| Kolb’s Learning Styles |  |
| **Learning Preferences** | |
| **Preferences** | **How are the preferences applicable in your precepting role? What are the key points you need to remember?** |
| Instructional Preferences |  |
| Sensory Preferences |  |
| **How do you learn best?** | |
| It’s helpful to think about how you learn best. Think about the instructional and sensory learning preferences discussed in the chapter. How do you learn best? | |
|  | **How do you learn best?** |
| Environment |  |
| Sociological |  |
| Emotional |  |
| Psychological |  |
| Physical |  |
| Sensory |  |

**Chapter 3**

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| **Preceptor Development Plan: Core Precepting Concepts** | | | |
| Review the information on the core precepting concepts described in this chapter. What are your strengths? In which areas do you need to increase your knowledge and expertise? What is your plan for expanding your knowledge and expertise? What resources are available? Who can help you? | | | |
| **Name:** | | | |
| **Date:** | | | |
| **Competence Assessment** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Competence Development** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Critical Thinking** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Reasoning** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Judgment** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Situational Awareness, Expert Reasoning, and Intuition** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Confidence** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
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| **Preceptor Development Plan: Preceptee Role Competencies** | | | | |
| Review the competencies that are required for your preceptee. If written descriptions of these competencies are not available, work with other stakeholders to develop them. Assess your own knowledge and expertise on each of the competencies. What are your strengths? In which areas do you need to increase your knowledge and expertise? What is your plan for expanding your knowledge and expertise? What resources are available? Who can help you? | | | | |
| **Preceptee Role:** | | | | |
| **Competency** | **Preceptor Strengths** | **Preceptor Needs** | **Plan** | **Resources** |
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**Chapter 4**

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| **Preceptor Development Plan:** **Preceptor Role Clarification** | |
| Use the questions in this form to guide a conversation with your manager to clarify expectations of you in the preceptor role. | |
| **Name:** | |
| **Manager:** | |
| **Date:** | |
| **Expected Outcomes** | |
| At what level of practice do you expect the preceptee to be at the end of the preceptorship? |  |
| What specific competencies do you expect the preceptee to have at the end of the preceptorship? |  |
| **Preceptor Role Requirements** | |
| What are your expectations of me in the preceptor role? |  |
| Are there classes I need to take? |  |
| Are there continuing education requirements? |  |
| Will I need to liaison with anyone (e.g., nursing school faculty for student nurses)? If yes, with whom? |  |
| **Support Available for the Preceptor and the Preceptee** | |
| What initial preparation will I get for the preceptor role? |  |
| Will additional education be available in the future? If so, what? |  |
| Who is available to me as a resource? |  |
| Will I have an experienced preceptor to precept me in my preceptor role? |  |
| What information resources are available to me and my preceptee? |  |
| If the preceptee is an NGRN, do we have a structured RN residency or transition to practice program in place? Will there be training for me on that program? |  |
| **Time Dedicated to the Preceptor and Preceptee Roles** | |
| How much of my time will be dedicated to the preceptor role for each type of preceptee (e.g., NGRN, new hire experienced nurse, experienced nurse new to our specialty)? |  |
| How much preceptee time will be dedicated to the preceptee role for each type of preceptee (e.g., NGRN, new hire experienced nurse, experienced nurse new to our specialty)? |  |
| What part of my hours and my preceptee’s hours will be counted in staffing? |  |
| **Priority of Precepting Role With Other Duties** | |
| Except for emergencies, will I be pulled to staff other shifts or units when I am in my preceptor role? If yes, will someone take my place with my preceptee? |  |
| **Other Items/Issues Discussed** | |
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| **Preceptor Development Plan: Precepting Strategies** | | | |
| Review the precepting strategies described in this chapter. What are your strengths? In which areas do you need to increase your knowledge and experience? What is your plan for expanding your knowledge and expertise? What resources are available? Who can help you? | | | |
| **Name:** | | | |
| **Date:** | | | |
| **Sharing Information** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Creating Positive Learning Environments: Enhancing Experiential Learning** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Creating Positive Learning Environments: Brain Rules** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Creating Positive Learning Environments: Interprofessional Learning Environments** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Creating Positive Learning Environments: A Safe Learning Environment** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Establishing the Preceptor-Preceptee Relationship** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Preceptee Learner Assessment** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Managing Transitions** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Teaching Strategies: Strengths-Based Approach** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Teaching Strategies: Microskills Model** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Teaching Strategies: Debriefing** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Teaching Strategies: Reflective Practice** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Teaching Strategies: Mindfulness** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Clinical Teaching Strategies: Resilience** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Ending the Preceptor-Preceptee Relationship** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
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**Chapter 5**

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| **Preceptor Development Plan: Professional Identity** | | | |
| Review the information on professional identity described in this chapter. What are your strengths? In which areas do you need to increase your knowledge and expertise? What is your plan for expanding your knowledge and expertise? What resources are available? Who can help you? | | | |
| **Name:** | | | |
| **Date:** | | | |
| **Understanding the Concepts of Professional Identity** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Using Strategies to Encourage Professional Identity Formation** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
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**Chapter 6**

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| **Preceptor Development Plan**  **Having a Plan: Developing and Using Goals, Objectives, and Outcomes** | | | |
| Review the information on developing and using goals, objectives, and outcomes described in this chapter. What are your strengths? In which areas do you need to increase your knowledge and expertise? What is your plan for expanding your knowledge and expertise? What resources are available? Who can help you? | | | |
| **Name:** | | | |
| **Date:** | | | |
| **Relationship Among Goals, Objectives, and Outcomes** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Taxonomies of Learning** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Developing Goals** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Developing Outcomes** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |
| **Developing Objectives** | | | |
| **Strengths** | **Needs** | **Plan** | **Resources** |
|  |  |  |  |

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| **Preceptor Development Plan**  **Having a Plan: Developing and Using Objectives, Goals, and Outcomes** | | |
| Review the overall objectives, goals, and outcomes that are required for your preceptee throughout their onboarding experience. If written descriptions of the objectives, goals, and outcomes are not available, work with other stakeholders to develop them. Based on these objectives, goals, and outcomes, create a plan for your preceptee. | | |
| **Preceptee Role:** | | |
| **Goal:** | | |
| **Outcome:** | | |
| **Objective** | **Plan of Action** | |
| **Time Frame** | **Plan** |
|  |  |  |
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|  |  |  |
|  |  |  |
| **Goal:** | | |
| **Outcome:** | | |
| **Objective** | **Plan of Action** | |
| **Time Frame** | **Plan** |
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|  |  |  |
|  |  |  |
|  |  |  |
| **Goal:** | | |
| **Outcome:** | | |
| **Objective** | **Plan of Action** | |
| **Time Frame** | **Plan** |
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