



MASTERING PRECEPTING

A Nurse's Handbook for Success

SECOND EDITION



**BETH
ULRICH**

Praise for the Second Edition of *Mastering Precepting: A Nurse's Handbook for Success*

“Mastering Precepting is a must-have handbook for teaching and learning clinical science and a practical overview of how and when that science is relevant. Preceptors are central knowledge workers in today’s complex, fast-paced healthcare systems. ‘On the spot’ precepting calls attention to critical changes in patients across time, while also teaching a vast amount of local knowledge about how a community of practice learns, collaborates, and communicates. This book is an invaluable guide—a must-read for all preceptors and nurse managers.”

–Patricia Benner, PhD, RN, FAAN
Executive Director, EducatingNurses.com
Professor Emerita, School of Nursing, Department of Social and Behavioral Sciences,
University of California, San Francisco

“Since the concept of reality shock was identified in the early 1970s, we have known that how nurses are socialized into the profession influences the success of their practice and their entire careers. Subsequent research has found that preceptors and a precepted experience are instrumental in helping new graduate registered nurses make the transition to professional nurses. In Mastering Precepting, Beth Ulrich and colleagues provide an excellent resource for nurses who are learning to become preceptors and for educators who are responsible for preceptor development.”

–Marlene Kramer, PhD, RN, FAAN
President, Health Science Research Associates

“This book is the most significant contribution to the literature in the last two decades on the art and science of preceptorship in the nursing profession. Beth Ulrich and her fellow authors provide theories, practical applications, and ultimately the path forward for transforming organizations and individuals in a complex, modern world that requires disruptive thinking and intentional action to create a better tomorrow for our patients, our colleagues, and our profession.”

–Cole Edmonson, DNP, RN, FACHE, NEA-BC, FAAN
Robert Wood Johnson Foundation Executive Nurse Fellow Alumna 2012-2015 Cohort
Chief Nursing Officer, Texas Health Dallas
NLN Foundation Chair

“This book is a brilliant and comprehensive resource for all nurses who participate in the critically important preceptor role. Beth Ulrich and her team have created an exceptionally practical and well-evidenced tool for preceptors and managers that is a must-read for all involved in this process! This book elevates the preceptor role firmly into a formal position that recognizes the essential responsibility preceptors hold.”

–Judith G. Berg, MS, RN, FACHE
President and CEO, HealthImpact

“Preceptors are the linchpins in the smooth transition of nurses and students into new roles. Mastering Precepting: A Nurse’s Handbook for Success is a terrific guide to how to be successful in the preceptor role.”

–Rose O. Sherman, EdD, RN, NEA-BC, FAAN
Editor in Chief, *Nurse Leader*
Professor and Program Director, Nursing Administration and Financial Leadership,
Florida Atlantic University

“I have had the privilege of being mentored by Beth Ulrich. I say ‘privilege’ because she takes mentorship to heart and, as such, would never take on a mentee if she was unable to give the person her all. This is but one of the essential qualities of mentorship I learned from her. I have met no one who is more skilled at helping mentees navigate difficult situations or reminding them to celebrate their successes. I celebrate you, Beth. Thank you for sharing your wisdom with me and the nursing community.”

–Kenneth W. Dion, PhD, MSN, MBA, RN
Assistant Dean for Business Development and Strategic Relationships
Johns Hopkins School of Nursing

“The second edition of Mastering Precepting: A Nurse’s Handbook for Success improves on the already excellent, evidence-based original. The new chapter on precepting advanced practice nurses adds essential content, and the final chapter, ‘Preceptor Development,’ gives the reader a template for applying every chapter in the book to a preceptor development program. This is a must-read for anyone developing or improving a preceptor program for new graduates transitioning from academic education to practice, for experienced nurses changing specialties or roles, or for nurses changing practice settings. In addition to facilitating the transition of nurses by ensuring adequate knowledge and competency, preceptors transmit the culture of quality and safety. This book keeps its promise—it truly is a handbook for creating successful transitions.”

–Patsy Maloney, EdD, MSN, MA, RN-BC, NEA-BC, CEN
Senior Lecturer, Nursing and Healthcare Leadership
University of Washington Tacoma

“Beth Ulrich has produced a wonderful book full of thoughtful resources to assist nurses in mastering the art of precepting new leaders. The contributions are masterful and useful for educators, clinicians, and nurse executives!”

–Linda Burnes Bolton, DrPH, RN, FAAN
Senior Vice President and Chief Nursing Executive
Cedars-Sinai Medical Center

“The role of preceptor is indispensable in the complex, dynamic environments in which nurses at all levels practice today. This second edition of Mastering Precepting provides a compendium of resources for anyone interested in becoming a preceptor, becoming a better preceptor, or improving an organization’s preceptor program. This edition contains practical tips and tools that can be tailored to unique situations and implemented immediately. It is also a ready reference for all nurses on coaching, communicating, selecting preceptors, and providing feedback.”

–David Marshall, JD, DNP, RN, CENP, NEA-BC, FAAN
System Chief Nursing and Patient Care Services Executive
The University of Texas Medical Branch

“Learning facilitators are known by many names, and one of those is ‘preceptor.’ Preceptors abound because nursing relies on them to develop talent in specific situations. With the first edition of Mastering Precepting, Dr. Ulrich and her colleagues gave all who precept a ready reference to understand the role and specific skills to be successful. This second edition doesn’t disappoint. Being a preceptor is a complex challenge, a combination of expert practitioner and clinical educator. Because these roles are typically more focused on practitioner than educator, the book’s resources—tables that summarize key information, forms that invite readers to respond to questions—are especially useful. This second edition concludes with a chapter that supports the preceptor by offering a suggested outline of chapter-by-chapter learning. Mastering Precepting is a one-stop place to learn about what it means to precept, what preceptors do, and what a curriculum focused toward development of preceptors would include. With the emergence of the Certified Nurse Educator–Clinical credential from the National League for Nursing, this book becomes an even more valuable resource.”

–Patricia S. Yoder-Wise, EdD, RN, NEA-BC, ANEF, FAAN
Professor and Dean Emerita, Texas Tech University Health Sciences Center
President, The Wise Group

“Nurses are expected to lead and serve others toward a better health. Dr. Ulrich said it best: ‘Preceptors are leaders and influencers.’ This book is a must-have for all preceptors to ensure a successful professional journey. I was amazed to see the depth of knowledge found in this book. Furthermore, the content offers an opportunity for the reader to develop a professional plan. This is an excellent resource for all preceptors seeking and pursuing a lifelong journey of professional development.”

–Sylvain “Syl” Trepanier, DNP, RN, CENP, FAAN
Chief Clinical Executive Officer, Providence St. Joseph Health
Southern California Region, Irvine, California

“Mastering Precepting: A Nurse’s Handbook for Success, Second Edition, provides strategies for use by nurses at all levels of practice. The role of precepting has increased importance and newfound trials in today’s complex healthcare environment. Dr. Ulrich explores opportunities, challenges, and best practices in this book. Her contemporary view of precepting examines generational differences, specific learner populations, instructional technologies, and self-care strategies. This important book fills gaps in knowledge that nurses may not have known existed.”

–Tamara Kear, PhD, RN, CNS, CNN
Associate Professor of Nursing
M. Louise Fitzpatrick College of Nursing, Villanova University
Nursing Research Consultant, Main Line Health

Mastering Precepting

A Nurse's Handbook for Success

Second Edition

Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN



Copyright © 2019 by Sigma Theta Tau International Honor Society of Nursing

All rights reserved. This book is protected by copyright. No part of it may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without written permission from the publisher. Any trademarks, service marks, design rights, or similar rights that are mentioned, used, or cited in this book are the property of their respective owners. Their use here does not imply that you may use them for a similar or any other purpose.

This book is not intended to be a substitute for the medical advice of a licensed medical professional. The author and publisher have made every effort to ensure the accuracy of the information contained within at the time of its publication and shall have no liability or responsibility to any person or entity regarding any loss or damage incurred, or alleged to have incurred, directly or indirectly, by the information contained in this book. The author and publisher make no warranties, express or implied, with respect to its content, and no warranties may be created or extended by sales representatives or written sales materials. The author and publisher have no responsibility for the consistency or accuracy of URLs and content of third-party websites referenced in this book.

The Sigma Theta Tau International Honor Society of Nursing (Sigma) is a nonprofit organization whose mission is advancing world health and celebrating nursing excellence in scholarship, leadership, and service. Founded in 1922, Sigma has more than 135,000 active members in over 90 countries and territories. Members include practicing nurses, instructors, researchers, policymakers, entrepreneurs, and others. Sigma's more than 530 chapters are located at more than 700 institutions of higher education throughout Armenia, Australia, Botswana, Brazil, Canada, Colombia, England, Ghana, Hong Kong, Japan, Jordan, Kenya, Lebanon, Malawi, Mexico, the Netherlands, Nigeria, Pakistan, Philippines, Portugal, Puerto Rico, Singapore, South Africa, South Korea, Swaziland, Sweden, Taiwan, Tanzania, Thailand, the United States, and Wales. Learn more at www.sigmanursing.org.

Sigma Theta Tau International
550 West North Street
Indianapolis, IN, USA 46202

To order additional books, buy in bulk, or order for corporate use, contact Sigma Marketplace at 888.654.4968 (US and Canada) or +1.317.634.8171 (outside US and Canada).

To request a review copy for course adoption, email solutions@sigmamarketplace.org or call 888.654.4968 (US and Canada) or +1.317.634.8171 (outside US and Canada).

To request author information, or for speaker or other media requests, contact Sigma Marketing at 888.634.7575 (US and Canada) or +1.317.634.8171 (outside US and Canada).

ISBN: 9781945157868
EPUB ISBN: 9781945157875
PDF ISBN: 9781945157882
MOBI ISBN: 9781945157899

Library of Congress Cataloging-in-Publication data

Names: Ulrich, Beth Tamplet, editor. | Sigma Theta Tau International issuing body.

Title: Mastering precepting / [edited] by Beth Tamplet Ulrich.

Description: Second edition. | Indianapolis, IN : Sigma Theta Tau International Honor Society of Nursing, [2019] | Includes bibliographical references.

Identifiers: LCCN 2018041175 | ISBN 9781945157868 (pbk.) | ISBN 9781945157882 (PDF) | ISBN 9781945157899 (MOBI) | ISBN 9781945157875 (ePUB)

Subjects: | MESH: Preceptorship | Education, Nursing--methods

Classification: LCC RT74.7 | NLM WY 18.5 | DDC 610.73--dc23 LC record available at <https://lcn.loc.gov/2018041175>

First Printing, 2018

Publisher: Dustin Sullivan
Acquisitions Editor: Emily Hatch
Development Editor: Kevin Kent
Cover Designer: Michael Tanamachi
Interior Design/Page Layout: Rebecca Batchelor

Managing Editor: Carla Hall
Project Editor: Kevin Kent
Copy Editor: Erin Geile
Proofreader: Gill Editorial Services
Indexer: Joy Dean Lee

Dedication

To my husband, Walter, who is my biggest fan and supporter; my daughter, Blythe, who makes me so proud to be her mom; my son-in-law, Michael; and my grandson Henry, who brings me such joy and shows me new ways to see the world.

To my colleagues who have precepted me throughout my career. I have been fortunate in every role I've ever had to have had someone who was willing to precept me—someone to help me transition to the new role and develop the competence and confidence to succeed. This book is dedicated to each of them with my utmost gratitude and appreciation.

To every nurse who has ever been a preceptor and every nurse who will become a preceptor. There is no greater contribution to nursing and to patient care than to ensure the competence of the next generation of nurses. Your commitment to the nursing profession and to our patients makes me proud to be your colleague.

Acknowledgments

It truly takes a village to create a book.

Thank you first and foremost to a dedicated group of contributors. I appreciate their willingness to share their knowledge and expertise.

Thanks to everyone who read and used the first edition of *Mastering Precepting* and made suggestions on ways to improve the second edition.

Thanks to the wonderful Sigma team who take care of every aspect of making a book come to life.

About the Author

Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN

Beth Ulrich is a nationally recognized thought leader who is known for her research studying nursing work environments and the experiences of new graduate nurses as they transition from nursing school into the workforce and for her leadership in developing the roles of nephrology nurses and improving the care of nephrology patients. Ulrich has extensive experience as a healthcare executive, educator, and researcher. She is currently a professor at the Cizik School of Nursing at The University of Texas Health Science Center at Houston, teaching in the DNP Program, and editor of the *Nephrology Nursing Journal*, the professional journal of the American Nephrology Nurses Association. Ulrich has been a co-investigator on a series of national nursing workforce and work environment studies and four studies of critical-care nurse work environments conducted with the American Association of Critical-Care Nurses.

Ulrich received her bachelor's degree from the Medical University of South Carolina, her master's degree from The University of Texas Health Science Center at Houston, and her doctorate from the University of Houston in a collaborative program with Baylor College of Medicine. She is a past president of the American Nephrology Nurses Association, a fellow in the American College of Healthcare Executives, and a fellow in the American Academy of Nursing. She was recognized as the Outstanding Nursing Alumnus of the Medical University of South Carolina in 1989, as a distinguished alumnus of The University of Texas Health Science Center at Houston School of Nursing in 2002, received the Outstanding Contribution to the American Nephrology Nurses Association award in 2008, and received the Marguerite Rodgers Kinney Award for a Distinguished Career from the American Association of Critical-Care Nurses in 2018. Ulrich has numerous publications and presentations to her credit on topics including nephrology nursing, nurses' work environments, and how new graduate nurses transition into professional nurses.

Follow her and engage with other preceptors on Twitter at [@RNPreceptor](#). For tools and other resources, go to www.RNPreceptor.com.

Contributing Authors

Larissa Africa, MBA, BSN, RN

Larissa Africa is President of Versant Holdings, LLC. Her experience began as a new graduate nurse at Children's Hospital Los Angeles in their first RN Internship Program in 1999. Africa was a key stakeholder in transitioning a department-based internship program capability to what is now known as the Versant, an organization that provides an outcomes-based transition to practice residencies and fellowships at healthcare organizations nationwide. Africa has published articles related to the economic benefit of transition to practice programs and the benefits of using a competency-based system for nursing students' capstone program. Africa has also served as the executive leader in the development and implementation of Versant's Transition Nurse Fellowship and Versant's Home Health Residency and Fellowship.

Cherilyn Ashlock, DNP, RN, NE-BC

Cherilyn Ashlock is the Director of Professional Practice at Johns Hopkins All Children's Hospital in St. Petersburg, Florida. Prior to coming to this role, Ashlock worked with Versant RN Residencies to support implementation of a clinical transition to practice program for new graduate registered nurses. In her current role as director for professional practice, Ashlock oversees clinical and unit-based onboarding, development and education, nursing research, and nursing quality outcomes. Under her leadership, Johns Hopkins All Children's continues to develop their transition to practice programs, as well as build upon the preceptor role for nursing and patient care services. Ashlock completed her doctor of nursing practice (DNP) degree in executive leadership at Old Dominion University in 2017 and focused her capstone work on interventions to prevent missed nursing care in the pediatric acute care environment.

Cindy Bianchini, MSN, RN, CNOR

Cindy Bianchini is the Director of the RN Residency program at Legacy Health in Portland, Oregon. She received her master's degree in nursing in 2016 with a focus on executive administration and leadership from the University of South Alabama in Mobile. Bianchini's background is in operating room nursing, and she spent 5 years as a system-wide surgical services educator helping to onboard new employees as well as facilitate ongoing professional development. Bianchini developed the current RN Residency program in 2015 when Legacy Health decided to bring the program internal. Bianchini led the building and development of Legacy's current residency program including specialty competencies, the mentor program, the curriculum, selecting and guiding subject matter experts, and preceptor development and support, with a focus on continuous quality improvement.

Carol A. Bradley, MSN, RN, CENP

Carol Bradley is the Senior Vice President and System Chief Nursing Officer for the Legacy Health System, an eight-hospital integrated healthcare delivery system serving Portland, Oregon, and southwest Washington. Prior to joining Legacy, Bradley served in a variety of senior nursing executive positions in large health systems, including the not-for-profit, for-profit, and public hospital sectors and was also the Regional Vice President and Editor for the California edition of *NurseWeek*.

Within her nursing career, she has worked as a staff nurse, clinical specialist, clinical director, and senior nurse executive. Bradley holds associate and bachelor's degrees in nursing from the University of Nebraska and a master of science in nursing degree from the University of Arizona. She is a 1991 Wharton Fellow and is certified in Executive Nursing Practice (CENP) by the American Organization of Nurse Executives. She is a nationally known speaker and consultant on nursing/patient care, workforce issues, and work environment improvement, and is a frequent contributor to journals, media, and professional publications on topics important to nursing and patient care. She has contributed to several books and serves on the editorial board of *Nursing Administrative Quarterly*.

Cathleen M. Deckers, EdD, RN, CHSE

Cathleen Deckers has over 36 years of nursing education and training experience in both the service and the academic arenas. Her academic areas of expertise include utilization of high fidelity simulation for education training and competency assurance, management and supervision of clinical rotation experience, and data collection and research in clinical workforce development. Deckers's research interests include high fidelity simulation, learning theory, and gaming. She is an active participant on the Accreditation Committee for the Society for Simulation in Healthcare to improve standardization of simulation practices internationally. Deckers currently works for California State University, Long Beach as an assistant professor in the School of Nursing. She also provides consultation and education services for CAE Healthcare.

Amy K. Doepken, MSN, RN

Amy Doepken is a registered nurse who manages the Medical Specialties Unit at Legacy Salmon Creek Medical Center in Vancouver, Washington. Amy has partnered with the University of Portland to adopt their Dedicated Education Unit Model for her medical unit. Doepken is the former program director for the RN Residency and Academic Relationships for Legacy Health in Portland, Oregon. Doepken has a passion for promoting a positive preceptor experience and was involved in the early development of Legacy's preceptor program. She has developed and supported debriefing and mentoring in her roles.

Doepken graduated with her bachelor of nursing science from the University of Portland in 2002 and a master's degree in health system leadership from Gonzaga University in 2014. She has a strong background in critical care nursing. Doepken is an active member of NNONE and AONE. She completed the AONE Nurse Manager Fellowship in 2016 and was the AACN 2010 Circle of Excellence Award Winner.

Virginia Downie, MSN, RN-BC, NPDS

Virginia Downie is a Nursing Education and Practice Specialist for Legacy Health in Portland, Oregon. She provides program support for the Legacy RN Residency Program in the areas of curriculum, mentorship, and preceptorship. Downie spearheaded the development and implementation of the Legacy Preceptorship Program, which provides ongoing recruitment, training, and support for RN and non-RN preceptors throughout the organization.

Downie received her master's degree in nursing education from Nebraska Methodist College in 2014, and is board certified as a Nursing Professional Development Specialist. These accomplishments and her 30 years of direct care nursing experience enrich the commitment she has for creating and sustaining robust RN residency programs and preceptorships.

Denise D. Fall, DNP, RN, CENP

Denise Fall is the Vice President and Chief Nursing Officer for Legacy Good Samaritan Medical Center. Fall completed her doctoral work at the University of San Francisco. She was the hospital nurse executive for Legacy Salmon Creek for 3 years before returning to Good Samaritan where she started her nursing career. Fall is known for building strong collaborative teams who drive quality and patient outcomes. Fall continues to support the clinical and academic progression of all nurses through her work as a preceptor for doctoral and master's students, as well as by advocating for new nurse graduates to be welcomed into all clinical settings.

Mary S. Haras, PhD, MBA, APN, NP-C, CNN

Mary Haras is currently Associate Professor and Chair, Department of Advanced Nursing Practice at Georgetown University in Washington, DC. Prior to that, she was Associate Dean for graduate nursing programs at Saint Xavier University in Chicago. Haras is certified as an adult nurse practitioner by the American Academy of Nurse Practitioners, and is a certified nephrology nurse by the Nephrology Nursing Certification Commission. Haras has extensive experience in curriculum and preceptor development and has authored several book chapters and numerous manuscripts. She received her PhD in nursing from Illinois State University. Her research interests include advance care planning for persons with chronic kidney disease.

Cindy Lefton, PhD, RN, CXP

Cindy Lefton is Manager and Researcher, Patient Experience, Emergency Services at Barnes-Jewish Hospital and Vice President, Organizational Consulting at Psychological Associates, Inc. She has combined her knowledge of organizations with her extensive experience as a registered nurse, paramedic, and clinical research nurse to develop a variety of effective interventions for academic medical centers and hospitals. These projects encompass a broad scope of services, including coaching, team building, survey development, and organizational collaboration training. Her research interests include healthy work environments, with an emphasis on meaningful recognition, demonstrating respect in the workplace, and team collaboration. Currently, she is leading The DAISY Award Impact Research team. Lefton has published articles on meaningful recognition, collaboration, respect, and culture change.

Lefton obtained her PhD in psychology from St. Louis University. She earned a master of science in research from St. Louis University and a master of arts in human resource management from

Washington University, a bachelor of science in industrial psychology and organizational psychology from Washington University, and a nursing diploma from Jewish Hospital School of Nursing.

Robert E. Lefton, PhD

Robert Lefton, Cofounder and Current Chairman and CEO of Psychological Associates, Inc., has 60 years of experience as a consultant in leadership, organization and cultural change, and succession planning. Since earning his PhD at Washington University in St. Louis, Missouri, he has worked as a consultant with many of *Fortune's* top 500 companies, has served on the faculty of Washington University, the Motorola Executive Institute, the ALCOA Executive Institute, and CEO International, Inc. As one of the original developers of Dimensional Training, he has conducted seminars for and consulted with several hundred leading hospitals and corporations in the United States and Europe. Lefton is coauthor of five books: *Leadership Through People Skills*, *Dimensional Selling*, *Effective Motivation Through Performance Appraisal*, *Making Common Sense Common Practice*, and *Why Can't We Get Anything Done Around Here?* Lefton currently serves on the board of directors for Barnes-Jewish Hospital of St. Louis and numerous privately held and family-owned businesses. He is honored to be an executive in residence at the John M. Olin School of Business at Washington University in St. Louis.

Kim A. Richards, RN, NC-BC

As an author, inspiring professional speaker, and ANCC Board Certified Nurse Coach, Kim Richards is passionate about supporting busy caregivers in their quest for practical self-care integration. As a nurse and an executive recruiter, Richards became increasingly aware of the “revolving door” of nurses in acute care facilities. After interviewing hundreds of nurses, she noticed a common theme was emerging. Nurses were expressing signs and symptoms of compassion fatigue and burnout. By combining her passion for nursing, fitness, and coaching as well as her extensive research on the science of self-care, Richards created the components of Self-Care Academy, LLC, a comprehensive program that reduces turnover, improves engagement, and creates a culture of caring.

Karen C. Robbins, MS, RN, CNN

Karen Robbins has spent the majority of her nursing career in nephrology nursing. She has been a staff nurse in hemodialysis, a nurse clinician in transplantation, a nurse educator in a dialysis and transplant program, and the independent living donor advocate for live kidney donors. Robbins has been a mentor and educator for many nurses, especially in nephrology nursing, and an advocate for patients. She is a published author, editor, recognized speaker, and legal nurse consultant. Robbins is a Certified Nephrology Nurse by the Nephrology Nursing Certification Commission. The associate editor of the *Nephrology Nursing Journal*, she is a past president of the American Nephrology Nurses Association.

Laura Lynn Rooney, DNP, RN, FNP-BC, BC-ADM, FAANP

Laura Rooney has over 20 years of nursing and advanced nursing practice experience, and more than 10 years in nursing education, focusing on the advanced practice role. Rooney has been a family nurse practitioner in primary care, pain management, occupational health, and rural medicine. As Director of a nurse-managed clinic, Rooney was successful in implementing the first certified Diabetes Education Management Program in the system, followed by Level 3 recognition from the National Center for Quality Assurance (NCQA) as a Patient Centered Medical Home—the first nurse-managed clinic with this distinction in the health system. As the Director and Head Administrator for the clinic, Rooney was instrumental in establishing protocols and procedures, recruiting and retaining staff, and facilitating teamwork while demonstrating leadership.

Currently Rooney is an assistant professor at Cizik School of Nursing, with primary responsibilities in the doctor of nursing practice (DNP) program. She continues to practice in family medicine, with a focus on an underserved population, in a large multispecialty practice.

Laurie Shiparski, MS, BSN, RN

Laurie Shiparski has over 30 years’ experience in nursing and healthcare leadership positions. She has worked in various roles including critical-care RN, clinical hospital leadership, healthcare consulting business owner, and corporate executive in a healthcare technology and clinical practice company. She is currently a principal at Edgework Institute. As a consultant, Shiparski works in partnership with hospital leadership on leadership development and coaching, communication, physician-driven practice improvement, strategy, and operations improvement.

Shiparski has sought to uncover her gifts and bring her authentic self to work and life, which has inspired her to offer programs that focus on taking care of self, navigating change, finding passion and purpose, and creating new possibilities. She is also an international speaker and an author of numerous articles and five books.

Kelly C. Walker, DNP, CNM

Kelly Walker is an Assistant Professor and Core Program Director in the Department of Advanced Nursing Practice at Georgetown University’s School of Nursing and Health Studies. Prior to that, she was an Assistant Professor and Program Director for the Nurse Midwifery Program at Stony Brook University School of Nursing. She was a member of the Regional Perinatal Center at Upstate Medical University as a Certified Nurse Midwife and faculty member for 11 years. Her clinical experience also included 7 years in nursing at New York University. Her current practice includes midwifery care in a community outpatient setting. She holds a bachelor’s degree in English from Russell Sage College, a bachelor’s and master’s degree in nursing from New York University, and a doctorate in nursing practice from Stony Brook University. Walker also completed a post-doctorate fellowship in leadership and education at Stony Brook University.

Walker's clinical scholarship includes improving maternal fetal outcomes and access to healthcare for vulnerable populations. Specific areas of interest include improving access to care for the LGBT community, identifying women at risk for postpartum depression, and decreasing elective induction of labor rates. Her scholarship in education includes promoting technology in distance education and outcome evaluation in midwifery and graduate education.

Walker holds an appointment on the Board of Midwifery for New York State. She is also a member of American College of Nurse Midwives, New York State Association of Licensed Midwives, and the Accreditation Commission for Midwifery Education.

Wendy Jo Wilkinson, MSN, ARNP

Wendy Jo Wilkinson has over 40 years' experience in the healthcare industry, serving in various roles within the acute hospital setting, home healthcare operations, and education. In these roles, she has gained expertise in leadership, multi-site management, start-up operations, strategic and financial planning, establishing clinical standards and competencies, development of specialized clinical programs, quality management and improvement, customer relations, and sales and marketing initiatives. Wilkinson now serves as Chief Nursing Officer and Manager for the Domestic Academy for CAE Healthcare, managing a team that consults and assists customers with applying, developing, implementing, and facilitating high fidelity patient simulation into their academic and hospital-based programs. She is ultimately responsible for the oversight of all CAE's educational products to ensure they are clinically and pedagogically sound.

Table of Contents

About the Author	ix
Contributing Authors	x
Foreword by Kathleen Sanford	xxv
Foreword by Gwen Sherwood	xxvii
Introduction	xxix
1 The Preceptor Role	1
<i>Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN</i>	
The Context of Precepting	2
<i>Nursing Context</i>	2
<i>Healthcare System Context</i>	5
Preceptor Roles	9
<i>Teacher/Coach</i>	9
<i>Leader/Influencer</i>	10
<i>Facilitator</i>	12
<i>Evaluator</i>	12
<i>Socialization Agent</i>	13
<i>Protector</i>	14
<i>Role Model</i>	15
Conclusion	15
References	18
2 Learning: The Foundation of Precepting	21
<i>Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN</i>	
Adult Learning Theory	21
Social Learning Theory	24
Hierarchy of Needs Theory	24
Experiential Learning Theory	26
Transformative Learning Theory	28
Novice to Expert	29
Learning Stages	31
Learning Styles	32
<i>Curry's Learning Style Classification System</i>	33
Cognitive Styles	34
<i>Gregorc's Learning Styles</i>	34
<i>Myers-Briggs</i>	34
<i>Field Dependence/Independence</i>	35
Kolb's Learning Cycle	35
Instructional Preferences	36
Sensory Learning Preferences	36
Conclusion	37
References	42

3	Precepting Strategies	45
	<i>Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN</i>	
	Getting Started	45
	Precepting Models	46
	<i>Single Preceptor Model</i>	47
	<i>Married State Preceptor Model</i>	47
	<i>Team Preceptor Model</i>	48
	Preceptee Cohorts or One at a Time?	48
	Sharing Information	49
	Creating Positive Learning Environments	50
	<i>Enhancing Experiential Learning</i>	51
	<i>Brain Rules</i>	51
	<i>Interprofessional Clinical Learning Environments</i>	52
	<i>A Safe Learning Environment</i>	53
	It Takes a Village	56
	Establishing the Preceptor-Preceptee Relationship	56
	Preceptee Learner Assessment	57
	Managing Transitions	58
	Clinical Teaching Strategies	58
	<i>Strengths-Based Approach</i>	58
	<i>Microskills Model</i>	60
	<i>Debriefing</i>	62
	<i>Reflective Practice</i>	65
	Mindfulness	66
	Resilience	68
	Ending the Preceptor-Preceptee Relationship	70
	Conclusion	71
	References	79
4	Core Precepting Concepts	83
	<i>Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN</i>	
	Competence	83
	<i>Competence Development</i>	85
	<i>Conscious Competence Learning</i>	86
	<i>Competency Outcomes and Performance Assessment (COPA) Model</i>	87
	<i>Wright Competency Model</i>	88
	Critical Thinking	89
	<i>Critical Thinking—A Philosophical Perspective</i>	89
	<i>Critical Thinking in Nursing</i>	91
	<i>Precepting Critical Thinking</i>	92
	Clinical Reasoning	93
	Clinical Judgment	94
	Developing Situational Awareness, Expert Reasoning, and Intuition	96
	Confidence	98
	Conclusion	99
	References	103

5	Having a Plan: Developing and Using Goals, Objectives, and Outcomes	105
	<i>Kelly C. Walker, DNP, CNM; Karen C. Robbins, MS, RN, CNN;</i>	
	<i>Mary S. Haras, PhD, MBA, APN, NP-C, CNN</i>	
	Expectations	106
	The Relationship Among Goals, Objectives, and Outcomes	107
	<i>Objectives vs. Outcomes</i>	108
	Learning Taxonomies and Learning Theories	109
	<i>Bloom's Taxonomy: Objectives and Domains of Learning</i>	109
	<i>Fink's Taxonomy of Significant Learning</i>	117
	<i>Kolb's Theory: Experiential Learning Cycle</i>	121
	Behavioral Objectives—Are They a Magic Potion?	122
	Creating Outcome Statements	123
	Distinguishing Outcomes From Objectives	124
	Developing Measurable Objectives and Outcomes	125
	Useful Frameworks for Preceptors and Preceptees	127
	<i>One-Minute Preceptor</i>	127
	<i>SNAPPS</i>	128
	Pitfalls of Developing Objectives	128
	Conclusion	130
	References	135
6	Communication	139
	<i>Laurie Shiparski, MS, BSN, RN</i>	
	The Five Skills of Effective Communication	139
	<i>Intent</i>	140
	<i>Listening</i>	141
	<i>Advocacy</i>	142
	<i>Inquiry</i>	143
	<i>Silence</i>	145
	Managing Different Methods of Communication	146
	Patient Safety and Handoffs	147
	Considerations for Participating in Team Communications	148
	Managing Difficult Conversations	149
	Communication Strategies for Education and Meetings	150
	Conclusion	152
	References	156
7	Coaching	157
	<i>Laurie Shiparski, MS, BSN, RN</i>	
	What Is the Role of the Preceptor as Coach?	157
	Setting Up a Coaching Agreement With a Preceptee	158
	Utilizing a Coaching Interaction Process	159
	A Case Study to Exemplify 4 Gateways Coaching	161
	<i>The Issue</i>	161

Strategies to Inspire Learning and Move Through Challenges	164
The Preceptor's Role in Working With Resistance and Edges.	165
<i>An Edge Story</i>	165
Ending a Coaching Relationship With a Preceptee.	166
Conclusion	167
References	170
8 Effectively Using Instructional Technologies	171
<i>Cathleen M. Deckers, EdD, RN, CHSE; Wendy Jo Wilkinson, MSN, ARNP</i>	
Why Technology Is Imperative for Today's Healthcare Environment	171
Technology Across Generations	172
Web-Based Technologies for Presenting Didactic Material	173
Web-Based Collaboration Tools for Maximizing Informal Learning.	176
<i>Effectiveness of Web-Based Collaboration Tools</i>	177
Simulation	178
<i>The Pursuit of Fidelity</i>	179
High-Fidelity Patient Simulation	181
<i>Developing Clinical Competence and Confidence</i>	181
<i>Facilitating Clinical Judgment</i>	182
<i>Using HFPS to Develop Situation Awareness and Clinical Reasoning</i>	182
<i>Design of High-Fidelity Patient Simulation Experiences</i>	184
<i>Implications of Using High-Fidelity Patient Simulation for Preceptors,</i> <i>Educators, and Managers</i>	187
<i>Quality Improvement in Precepting</i>	190
Future of Instructional Technology/Future Implications of Instructional Technology Use	191
Conclusion	192
References	195
9 Precepting Specific Learner Populations.	197
<i>Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN</i>	
Prelicensure Student Nurses	197
<i>Creating a Positive Clinical Learning Environment for Prelicensure Students</i>	202
<i>A Recruitment Strategy</i>	203
New Graduate Registered Nurses	203
<i>The Practice-Education Gap</i>	204
<i>Bridging the Gap—Transition to Practice</i>	205
<i>Precepting NGRNs</i>	207
<i>Managing the Normal Chaos</i>	207
<i>Scope of Practice and Autonomy</i>	208
<i>New Experiences</i>	209
<i>Being a Nurse—Developing Professional Identity</i>	209
<i>Leadership and Interprofessional Teamwork</i>	210
<i>Other Considerations with NGRNs</i>	212
Post-Baccalaureate Graduate Students	213
Experienced Nurses	213

Internationally Educated Nurses	215
Nurses From Different Generations	216
<i>Learning Styles and Preferences</i>	219
<i>Precepting and Working With Each Generation</i>	219
Conclusion	219
References	222
10 Precepting Advanced Practice Registered Nurses	227
<i>Laura Lynn Rooney, DNP, RN, FNP-BC, BC-ADM, FAANP</i>	
Understanding the Role of the APRN Preceptor	227
Know Your Preceptee, Know Yourself	230
<i>Precepting the APRN Student</i>	230
Making the Most of the Clinical Setting	232
Understanding Yourself as the Preceptor—Incentives and Barriers	233
Precepting Strategies	236
Evaluation	239
Conclusion	240
References	243
11 Assessing and Addressing Preceptee Behavior and Motivation ...	245
<i>Cindy Lefton, PhD, RN, CPXP; Robert E. Lefton, PhD</i>	
Just Culture: A Problem-Solving Framework	246
<i>Three Types of Errors</i>	247
<i>Applying Just Culture</i>	248
Providing Feedback	249
The Dimensional Model of Behavior	249
<i>Quadrant 1 Behaviors</i>	252
<i>Quadrant 2 Behaviors</i>	252
<i>Quadrant 3 Behaviors</i>	253
<i>Quadrant 4 Behaviors</i>	253
<i>Summary</i>	253
Understanding Preceptee Motivations	254
Interacting With Influence—The Five-Step Format	258
<i>Step One: Start the Conversation</i>	258
<i>Step Two: Get the Preceptee's Views</i>	260
<i>Step Three: Give Your Views (of the Preceptee's Views)</i>	261
<i>Step Four: Resolve Differences</i>	262
<i>Step Five: Develop an Action Plan</i>	264
Five-Step Format Summary	264
Conclusion	265
References	268
12 Pragmatics of Precepting	271
<i>Larissa Africa, MBA, BSN, RN; Cheryl Ashlock, DNP, RN, NE-BC</i>	
Organization and Time Management	271
<i>Preparing for the Shift and Patient Assignment</i>	272
<i>Shift Reports and Patient Handoffs</i>	272

	<i>The Clinical Shift</i>	273
	<i>Establishing a Routine and Facilitating Prioritization</i>	273
	Delegation	275
	Performance Discrepancies	276
	Problem-Solving Preceptor-Preceptee Relationships	278
	<i>When Competency Performance Becomes a Challenge</i>	278
	Challenging Behaviors	279
	Preceptor-Preceptee Mismatch	280
	Conclusion	281
	References	284
13	Self-Care for Preceptors	285
	<i>Kim A. Richards, RN, NC-BC</i>	
	Self-Care	285
	Compassion Fatigue	286
	Self-Care Pathways	286
	<i>Physical Pathway</i>	287
	<i>Mental Pathway</i>	288
	<i>Emotional Pathway</i>	290
	<i>Spiritual Pathway</i>	292
	<i>Relationships Pathway</i>	292
	<i>Choices Pathway</i>	293
	Your Accountability Buddy and Self-Care	294
	Conclusion	295
	References	298
14	For Managers: Selecting, Supporting, and Sustaining Preceptors	299
	<i>Carol A. Bradley, MSN, RN, CENP; Amy K. Doepken, MSN, RN; Denise D. Fall, DNP, RN, CENP; Virginia Downie, MSN, RN-BC, NPDS; Cindy Bianchini, MSN, RN, CNOR</i>	
	Establishing Performance Standards and Preceptor Competencies	300
	Preceptor Selection Criteria	302
	Setting the Stage	306
	<i>Creating a Culture</i>	306
	<i>Defining Needs</i>	307
	<i>Matching Preceptors With Preceptees</i>	307
	<i>Setting Expectations</i>	310
	Preceptor Education	310
	Communication	311
	Evaluating Preceptors	312
	Supporting and Sustaining Preceptors and Preceptorships	314
	Providing Adequate Resources	314

Preceptor Support	315
Meaningful Recognition	316
Getting Creative to Overcome Challenges	317
Conclusion	318
References	322
15 Preceptor Development	323
<i>Beth Tamplet Ulrich, EdD, RN, FACHE, FAAN</i>	
Getting Started	323
Standards	323
<i>Assess the Practice Gap and Identify the Educational Needs</i>	324
Preceptor Program Delivery	325
<i>Face-to-Face</i>	325
<i>Online</i>	326
<i>Blended Approach</i>	326
Learner Engagement Strategies	327
Program Length	327
Evidence-Based Decisions and Content	328
Content—Using the <i>Mastering Precepting</i> Book for Preceptor Education	329
<i>Chapter/Module 1: The Preceptor Role</i>	329
<i>Chapter/Module 2: Learning: The Foundation of Precepting</i>	330
<i>Chapter/Module 3: Precepting Strategies</i>	331
<i>Chapter/Module 4: Core Precepting Concepts</i>	333
<i>Chapter/Module 5: Having a Plan: Developing and Using Goals, Objectives, and Outcomes</i>	334
<i>Chapter/Module 6: Communication</i>	334
<i>Chapter/Module 7: Coaching</i>	335
<i>Chapter/Module 8: Effectively Using Instructional Technologies</i>	336
<i>Chapter/Module 9: Precepting Specific Learner Populations</i>	337
<i>Chapter/Module 10: Precepting Advanced Practice Registered Nurses</i>	338
<i>Chapter/Module 11: Assessing and Addressing Preceptee Behavior and Motivation</i>	338
<i>Chapter/Module 12: Pragmatics of Precepting</i>	339
<i>Chapter/Module 13: Self-Care for Preceptors</i>	340
<i>Chapter/Module 14: For Managers: Selecting, Supporting, and Sustaining Preceptors</i>	340
Precepting the Preceptors	341
Program Evaluation and Continuous Improvement	341
Conclusion	341
References	344
A Additional Resources	347
American Nurses Association (ANA)	347
The Association for Nursing Professional Development (ANPD)	347
Campaign for Action	347

Institute for Healthcare Improvement (IHI)	348
Interprofessional Education Collaborative (IPEC)	348
Missouri Preceptor Academy	348
National Academy of Medicine Clinician Well-Being Knowledge Hub	349
National League for Nursing	349
QSEN Institute	349
<i>Faculty Learning Modules</i>	349
<i>QSEN Competencies</i>	350
<i>QSEN Teaching Strategies</i>	350
Index	351