"A creative mind can withstand any amount of bad training." That 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 outstanding learning opportunity that preceptorship affords, 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.

**Establishing and Using Objectives**

Objectives specify at what level the student will perform at the conclusion of the learning experience. 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 objective during the practicum. Some of the course objectives may relate more directly to the preceptorship experience than others. The course objectives describe the practice and knowledge expected of the student upon completion of the
course. Objectives may also contain conditions and standards for performance, such as time frames to be observed, reference materials to be used, or other criteria. Objectives are constructed in such a way that student performance may be measured and judged against objectives. The box below contains some sample course objectives.

Clinical objectives are more specific to practice. You will find more complete information pertinent to the course in which your student is enrolled in Section 8. USF CONAH Course Materials.

**SAMPLE CLINICAL OBJECTIVES**

1. Demonstrate advanced cardiovascular assessment.
2. Manage patients with selected cardiovascular health problems in a variety of settings.
3. Provide individualized risk factor reduction for special populations in a variety of settings.
4. Assess and manage common acute problems in primary care.
5. Interpret subjective and objective data to arrive at a correct diagnosis.
6. Formulate an individualized management plan drawing on knowledge from nursing, medicine, pharmacology, and other sciences.

**ESTABLISHING SHORT- AND LONG-TERM OBJECTIVES WITH THE STUDENT**

In addition to the objectives of the course, the student is 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 experience and the opportunities available in your practice. Guide the student toward objectives that are realistic given the time frame of the course, the opportunities available, and the resources required. Resources required include the amount of assistance from you and others that the student will need to accomplish objectives. The student may have to reconsider his or 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 or her objectives. Assure that work toward such objectives provides a learning experience and is consistent with the student’s goals and the faculty’s expectations.

Consider the student’s priorities and your own priorities for the student’s learning. What essential competencies of the advanced practice role that the student is learning are particularly available for the student to work on during this semester?
Leave room for flexibility in setting objectives. Priorities will change over the duration of the experience. As the student accomplishes some goals, others will emerge. As the student learns more about the opportunities available in your practice setting, new goals will take shape. In addition, the patients who present will offer unpredicted learning opportunities that will permit the student to accomplish unforeseen objectives.

Appendix III.A. contains examples of appropriate verbs for specifying objectives in each of the domains of learning and each level of each domain.

The box below contains some examples of objectives established by a preceptor and student together as additional objectives for the practicum. Note that objectives 1, 2, and 3 below might be personal objectives for a student taking the course and having objectives 1, 2, and 3 in the clinical box on page 2. These objectives are additional to objectives established by the faculty and reflect interests of the student and opportunities available in the practice setting.

**SAMPLE STUDENT’S PERSONAL OBJECTIVES**

*(NEGOTIATED COLLABORATIVELY WITH STUDENT, FACULTY, AND PRECEPTOR)*

1. Perform three exercise stress tests with cardiac patients.
2. Perform a fundoscopic exam on hypertensive patients.
3. Interpret 12-lead ECGs.

Once you and the student have clarified long-term objectives by reviewing course objectives and establishing objectives for the preceptorship experience, assess the student’s status with respect to each objective. What experiences can you plan that will offer the student the opportunity to practice the behaviors specified in the objectives?

Long-term objectives provide a clear vision of the student’s destination at the end of the course. Short-term objectives serve as a road map to give direction and milestones along the way. Short-term objectives will help you make the most productive use of your time with the student.

The faculty member may have prepared a checklist of specific procedures or experiences that contribute to the objectives. Inquire of the student and faculty to find out if they are using such guidelines. Such guidelines and checklists are a form of short-term objectives.

In addition, identify with the student the short-term objectives that must be accomplished to arrive at the end of the course with the long-term objectives accomplished. This requires breaking down
long-term objectives into the knowledge, skills, and attitudes that the student must gain over the
duration of the experience in order to meet the long-term objectives.

The box below contains some sample short-term objectives necessary to achieve the long-term
objectives stated in the preceding two boxes. Short-term objectives depend upon your assessment of
the student’s status in relation to the long-term objectives. A given student may enter the experience
with competence in some of the components of long-term objectives.

### SAMPLE SHORT-TERM OBJECTIVES

1. (Related to Clinical Objective 1, page 2)
   Performs cardiac auscultation as appropriate, efficiently and with correct technique.

2. (Related to Clinical Objective 5, page 2)
   Obtain a social history in a manner that helps the patient feel comfortable and
   encourages frank disclosure.

3. (Related to Clinical Objective 5, page 2)
   Identify several differential diagnoses based on assessment findings.

Additional short-term objectives include orientation to your practice setting: the physical
environment, safety procedures, co-workers, and work policies and practices. Share the
responsibility for establishing objectives and monitoring progress toward objectives with the student.
The preceptorship provides an opportunity for the student to practice professional accountability.
Create a plan that gives the student some responsibility for directing and monitoring the learning
process.

### KEEPING ON TRACK WITH OBJECTIVES

Once you and the student have agreed upon the objectives for the practicum, schedule a planning
meeting with the student. Ask the student to prepare for the meeting by planning a timetable for
accomplishing objectives. Review objectives accomplished and not yet attained with the student on a
daily basis.

Prepare for the meeting by assuring that you know the inclusive dates of the practicum and any
intervening holidays or other scheduling implications. What days and hours will the student spend
with you? Do you have any flexibility in arranging alternate times with the student? 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 other 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?

How will you plan for time when the student is scheduled with you but you are unavailable due to other professional commitments or unanticipated absence from work? Because practicum time is limited, the student needs to spend that time practicing skills and using resources that he or she can practice and use only in the practice setting. Activities that meet this criterion include reviewing patient records, comparing one patient with another on any relevant criteria, interacting with patients, and interacting with various agency personnel. Activities that do not meet this criterion include reading journal articles, writing student journal entries or other course requirements, and reviewing manuals or reference materials that could be reviewed outside the practice setting. Think in advance of appropriate activities that the student can pursue independently; identify these for the student, and incorporate them into the plan. Outline a realistic timetable for accomplishing the objectives, given the time and other resources available.

The goal of your planning meeting with the student is to mutually agree upon a realistic, workable plan to accomplish the objectives. Assure that you and the student have planned each day’s experience to contribute to accomplishing an objective. Each day’s experience should have a planned focus, although unforeseen opportunities will arise and serendipitous learning will occur. When other priorities or opportunities intervene in your plan, the presence of a planned focus will allow you to ascertain immediately if you will need to allocate additional time to the intended focus.

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. Ask the student to identify elements of progress:

- What he or she learned today
- What he or she plans to learn during the next scheduled day’s experience
- How he or she will prepare for next day’s experience

This reflection can be accomplished in only a few minutes and will greatly facilitate keeping on track with objectives.
The diagram below presents the Learning Vector concept that suggests a general plan for selecting and planning to use teaching techniques based upon the student's level of development.

Bowling (1993) refers to the concept of the Learning Vector to describe four learning styles that support the student’s need for greater independence in learning as the student matures professionally.

In the early phases of professional development when the student is first exposed to and acquiring practice expertise, the student responds best to a more authoritarian and teacher-centered approach. The preceptor assumes a directive role and communicates facts and principles.

As the student acquires knowledge and develops expertise, the preceptor employs the Socratic approach by raising questions with the student and encouraging the student to formulate questions.

As the student continues to mature, the preceptor invites the student to engage in clinical problem solving with the preceptor and assume a more collegial role. Bowling names this approach the heuristic teaching style, or “let’s-solve-it-together” attitude. The student incorporates some of the preceptor’s problem-solving strategies through dialogue with the preceptor when the preceptor employs the heuristic style.

When the student matures to the level of integration, the student develops a reasoning approach to problem solving and is ready for independence. The preceptor supports the student’s independence. The preceptor also counsels and stimulates the student’s motivation to pursue further learning. Bowling calls this teaching style behavioral.

Each teaching style has a place in the precepting process.

Apply the Learning Vector concept and Bowling’s teaching styles to plan your strategies with the student. Remember that the student may exhibit varying levels of development in different aspects of practice. When you assess the student, both initially and throughout the precepting experience, you will identify some aspects of practice in which the student is ready for independence. Even at the conclusion of the experience, you, however, may identify some aspects in which the student has had little previous learning and experience. This finding necessitates a more directive approach on your part.

Benner (1984) presented a concept similar to the Learning Vector when she described how nurses develop competence in practice along a continuum from novice to expert. She described five levels of competence in the journey from novice to expert:

Novice ⇒ Advanced Beginner ⇒ Competent ⇒ Proficient ⇒ Expert
Through learning and experience, the nurse moves from practice, based only upon rules to practice, based upon perceiving patterns and acting intuitively.

Davis, Sawin, and Dunn (1993) believe that Nurse Practitioner students enter the graduate program at the Advanced Beginner level (with respect to the NP role) and graduate at the Competent-Proficient level. Their research identifies teaching strategies that preceptors used to facilitate learning with students as summarized in the following chart.
Since students respond best to different styles at different points in their development, effective preceptors develop their facility with a variety of approaches along the continuum from directive to consultative. When you have identified your most preferred and strongest style, communicate this to both the student and the faculty member. The faculty member may consider this when assigning students to work with you in the future, to the extent that such matching is feasible. Also, you may plan to incorporate other individuals or additional resources to expose the student to other styles.

**Whenever possible, plan to give the student feedback at the conclusion of each day’s experience.** Respond to the student’s identification of his or her learning for the day; plan for the next experience. Comment on something that the student has done well and something upon which the student needs to improve or needs further practice. To allow time for feedback, some preceptors schedule themselves to see the last patient for the day 30 minutes earlier on the days they work with students.

**Revise your plan on an ongoing basis as you assess the student’s progress.** You may discover that the student is progressing more rapidly than you anticipated. For example, you may have planned that the student would observe you performing a particular procedure three times, then perform the procedure with your assistance three times, and finally perform the procedure independently three times under your observation. Instead, as you observe the student’s performance, you may decide that the student can perform the procedure with your coaching without observing you as planned. The student’s speedy progress with this procedure allows you to re-allocate time to other objectives and experiences.

Some preceptors find it helpful to make a copy of some of the student’s notes in the patient’s record. The copy of the notes then becomes a vehicle for reflecting on the experience the next week, critiquing practice, and considering alternatives.
When possible, plan to interact with other disciplines during the time that the student is present. 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 that your role requires. Try to choose one situation during each clinical experience that offers a meaningful opportunity for the student to consult with the physician.

In order for the student to develop in all aspects of the advanced practice role, the student needs exposure and experience with the political as well as the professional forces at work in the practice environment. As appropriate, expect the student to interact with management, administration, finance, and other disciplines that impact your practice. Discuss your plans to involve the student in these dimensions of your role with the faculty member and appropriate others in your setting.

Precepting requires additional time—-time to plan with the student, time to “think-out-loud” with the student, time to formulate and ask questions, time to observe student performance and coach, and time to empower the student to perform skills that you could do yourself much more rapidly. If possible, negotiate with your employer to adjust your workload during the time you are precepting. Emphasize the potential benefit to the employer of cultivating future staff members among the affiliated students. Stress the impact of favorable precepting conditions upon your job satisfaction and your professional responsibility to contribute to students’ learning.

If you plan that a colleague will work with the student when you are not available or when the student can gain a particular experience by working with someone else, communicate this plan clearly. Clarify for both the student and for the other individual exactly what you expect them to accomplish while working together. Introduce them and relay pertinent information about the student’s experience with the skills that their working together will involve. Arrange to receive feedback about the experience from both parties.
insky and Irby (1997) underscore the importance of reflecting on experience in order to improve clinical teaching. They write of planning as anticipatory reflection, teaching as reflection-in-action, and evaluation of teaching as reflection-on-action.

To create an effective plan, reflect on:
- your findings obtained by assessing the student
- the objectives you and the student have agreed upon
- your practice and your practice setting

When you reflect on your practice, remember to envision time that the student will spend with others, with review of charts and records, and with other activities, in addition to direct patient care.

Watch out for these planning pitfalls:
- misjudging the student
- planning too much for the time available
- failing to focus on the objectives to be accomplished

**PLANNING TO ACCOMPLISH A SAMPLE OBJECTIVE**

Read the situation that follows. Given the description of this student, what plans would you make to assist this particular student in accomplishing the objectives shown in the box below? Compare your thoughts with the suggestions in *Section 12, Model Answers*.

Katie has worked as a staff nurse in a busy inner city emergency department for five years. She characterizes her practice experience as a “fast-paced, get ‘em in, get ‘em out” situation. She has never written SOAP notes. Her course work so far has included health assessment, pharmacology, and advanced physical assessment. Currently she is taking the first of two courses in common health problems. She is working with you now in her second clinical rotation. During her first clinical
rotation, she spent 14 weeks in a busy inner-city clinic where most of the patients she saw spoke only Spanish. Since Katie does not speak Spanish, she communicated with most of her patients through an interpreter. Her interactions with patients focused on health and prevention. She worked with both male and female patients. She completed three pelvic exams with supervision.

What plans would you make to assist Katie to accomplish the following objective?

**Obtain a social history in a manner that helps the patient feel comfortable and encourages frank disclosure.**

**PLAN:**