

Summary Findings from the 2023

Preceptor Competency Consensus Study

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Executive Summary Findings

A preceptor is an individual with demonstrated competence in a specific area who guides, assesses, and validates the knowledge, skills, and attitudes needed to transition to a new role, specialty, or environment in the healthcare setting. Preceptors are integral to the orientation and onboarding of new staff and staff transitioning to a new role or department, as well as for students' clinical experiences (Ulrich, 2019). Despite the importance of the preceptor role, many healthcare staff serve as preceptors without preparation for the role (Warren et al., 2022). One potential barrier to developing and implementing preceptor development programs is the lack of evidence-based preceptor competencies.

The Association for Nursing Professional Development (ANPD) National Preceptor Practice Study was designed to identify a core set of preceptor competencies to guide professional development activities (Harper et al., 2021). Using job analysis methodology, Harper et al. (2021) conducted a national descriptive study to identify the roles, knowledge, and activities essential to preceptor practice. The initial phase of the study validated the seven role domains of preceptor practice identified by Ulrich (2012): role model, teacher/coach, facilitator, protector, socialization agent, leader/influencer, and evaluator and identified 140 preceptor competencies that met the threshold for consideration in the job analysis phase of the study. In the second phase of the study, a mixed-methods approach, consisting of a modified eDelphi technique and an expert panel, was used to establish consensus on preceptor role definitions and a manageable set of competencies, and to identify core preceptor competencies to guide professional development activities. Full details of the research study will be published elsewhere. Competencies and definitions are included in the tables that follow. For additional information, contact Dr. Mary Harper at mharper@anpd.org.

REFERENCES

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Table 1

Preceptor Role Definitions

Preceptor	Individual with demonstrated competence in a specific area who guides, assesses, and validates the knowledge, skills, and attitudes needed to transition to a new role, specialty, or environment in the healthcare setting
Preceptor Roles (Ulrich, 2012)	Definition: Role in which the preceptor...
Role Model	Models professionalism and role competence to positively influence the preceptee
Teacher/Coach	Expands the knowledge, skills, and competence of the preceptee with sensitivity to the preceptee's individual strengths and learning needs
Facilitator	Finds, negotiates, and creates positive and rich experiential learning opportunities and environments
Protector	Ensures the safety of the preceptee and the patient by creating a safe and supportive learning environment and providing preceptee oversight
Socialization Agent	Facilitates assimilation of the preceptee into the work environment and relationships by helping the preceptee understand social and cultural norms
Leader/Influencer	Inspires and guides the actions of others and conveys professional values in the practice setting
Evaluator	Continuously assesses the preceptee's performance and competence for job readiness with ongoing feedback for performance improvement

Table 2**Essential Attributes:**

Characteristics needed by preceptors that should be included in selection criteria

- ✓ Nonjudgmental
- ✓ Positive demeanor
- ✓ Encouraging
- ✓ Respectful
- ✓ Active listener
- ✓ Authentic
- ✓ Effective communicator (verbal and written)
- ✓ Adherent to legal/regulatory, professional, and ethical standards of practice

Table 3

Preceptor Core Competencies and Competencies by Role Domain

CORE COMPETENCIES (6 ITEMS)
Applies evidence-based practice
Solves problems
Respects others' opinions, viewpoints, time
Respects diversity
Maintains preceptee's confidentiality
Promotes preceptee's self-stewardship (commitment to oneself)
ROLE MODEL (5 ITEMS)
Recognizes impact of preceptor's personal attitudes/attributes, behaviors, competency level on preceptee
Demonstrates competent, evidence-based practice (e.g., knowledge, skills, abilities, judgment)
Demonstrates personal responsibility and accountability
Demonstrates healthy and safe behaviors
Demonstrates commitment to professional development
TEACHER/COACH (24 ITEMS)
Applies principles of adult learning and other applicable learning theories
Incorporates cognitive, psychomotor, and affective domains of learning
Establishes an ongoing collaborative and trusting relationship with preceptee
Assesses preceptee's understanding (e.g., situational awareness, knowledge)
Determines desired learning outcomes for preceptee
Focuses on key learning opportunities
Promotes progressive experiential learning
Fosters the preceptee's ownership of learning
Develops the preceptee's strengths
Modifies experiences based on assessment of preceptee's individual needs
Uses a positive approach to ask questions, to promote self-awareness, search for solutions, and focus on processes
Uses silence appropriately to allow preceptee to process information when communicating
Fosters situational awareness with questions, observation of patterns, or absence of expected patterns
Thinks out loud to demonstrate critical thinking and decision-making processes

TEACHER/COACH (24 ITEMS) - CONTINUED
Guides preceptee in differentiating what data/information is important and what is not
Guides preceptee to analyze situations and intervene appropriately (e.g., consider alternatives and desired outcomes)
Develops preceptee's ability to prioritize both individual patient care and simultaneous care of multiple patients
Helps preceptee identify errors and near misses
Supports preceptee's correct demonstration of skill/behavior even when confronted with incorrect practices of others
Guides preceptee to seek evidence/information from credible resources (e.g., policies and procedures, decision support tools, etc.)
Redirects counterproductive preceptee behaviors
Entrusts preceptee with progressively independent activities as appropriate
Debriefs after preceptee's experiences
Encourages preceptee self-awareness, reflection, and thinking aloud
FACILITATOR (5 ITEMS)
Recognizes learning opportunities
Creates purposeful learning experiences related to the preceptee's assessed learning needs and interests
Negotiates learning opportunities (e.g., accompany patient to procedure, assist with other patients)
Provides resources for support
Determines effectiveness of learning situations
PROTECTOR (8 ITEMS)
Clarifies with preceptee that preceptor may intervene during patient care to ensure safety
Ensures a physically and psychologically safe environment for the preceptee (e.g., free of workplace injuries, and physical abuse; ergonomics; sharps safety; hazardous materials management)
Promotes a just culture including differentiation of types of errors that may occur (e.g., human, at-risk, reckless)
Encourages preceptee to advocate for self and others (e.g., courage to speak own truth)
Anticipates issues/concerns that can result in moral distress to prepare preceptee
Promotes acceptance of preceptee by all staff members
Intervenes when confronted with disruptive/abusive behavior from others
Uses disruptive/abusive behaviors as a learning opportunity for prevention and future management

SOCIALIZATION AGENT (4 ITEMS)
Recognizes “reality shock” (i.e., expectation in school versus reality)
Shares unspoken rules, and norms, values, and culture of shift, unit, department, and organization
Includes the preceptee in unit/department activities
Provides opportunities for unit, interprofessional, and organizational engagement for preceptee
LEADER/INFLUENCER (13 ITEMS)
Advocates for patient choice
Demonstrates accountability (e.g., obligation, commitment, willingness, intent, trust)
Demonstrates professional values
Recognizes scope of practice of healthcare team members
Facilitates effective interprofessional team practice
Practices the “rights” of delegation
Supports formation of preceptee’s professional role identity
Provides meaningful recognition to preceptee
Ensures smooth transition of preceptee between preceptors
Adheres to organizational compliance program and code of conduct
Adheres to HIPAA regulations
Participates in unit/organization professional activities
Reflects on own leadership competencies
EVALUATOR (7 ITEMS)
Holds preceptee accountable
Validates performance of critical components for each required competency
Describes gap that exists between expectation and performance
Provides feedback to preceptee (e.g., timely, positive, constructive, nonpunitive, concise, and specifically focused feedback)
Provide accurate, specific, written, and verbal evaluation of preceptee performance
Manages difficult conversations when providing constructive feedback (e.g., resolves differences, demonstrates flexibility)
Communicates preceptee behavioral patterns (e.g., strengths, opportunities for improvement) using documents, reports, or other forms of communication