

**Preceptor Guide  
2020-2021**

**Health Care Administration (HCAD) Program – UW-Eau Claire**

**Preface**

This Preceptor Guide is designed for use along with the UW-Eau Claire Health Care Administration Practicum Guide. We have chosen not to cover every aspect and issue of preceptorship. Instead we try to provide basic and essential practical guidance that will assist you and your staff in providing for a successful practicum. Any questions not answered or issues not covered here can be addressed with university faculty.

We have kept the Guide short and basic for several reasons. First, you and your staff already have skill in dealing with people, including students. Second, additional information specific to academic requirements of the student will be delivered in the preceptor training course. Finally, we have observed that long, detailed sets of instructions are less useful for busy people than those that are short and to-the-point.

**Table of Contents**

1.	Introductory Remarks	3
2.	Preparing the Way	4
3.	Starting on the Right Foot	6
4.	Guiding Growth and Progress	10
5.	Concluding Remarks	13

## **Introductory Remarks**

People need to feel understood, accepted and valued in order to learn, to grow, and to function effectively with other people. This is true for members of a family, for employees in an organization, and also for students in a practicum. Much in this guide will address these themes in one way or another, because your students' success and your success as a preceptor will depend on how well you and your organization are able to give understanding, acceptance, and value to your students. We know that you and your staff are experts in providing these to the people you serve. We emphasize them in dealing with your students because they may not be seen as falling under the mission of service to others that guides all of your other activities. Yet, we also do not want to underestimate the value a student brings to you and your organization.

Our program seeks to give students the tools of a leader as well as those of an administrator. We find it true that a student's development into a budding leader and administrator depends on both the content of the curriculum and the attention to these human aspects of learning and growth. We believe we have an excellent practicum learning approach outlined in our Practicum Summary, included at the conclusion of the preceptor guide. Finally, have fun. Enjoy watching and being instrumental in your student's successful practicum experience. Here are some general insights we have gained over years of working with students in the practicum.

- The **preceptor/student relationship** is primary to success of the practicum. Vital to this relationship is effective communication between you and your student. **Effective communication** establishes **mutual respect, trust, openness, honesty, and acceptance of risk**. You must lead in building these. Once established, such a relationship will permit your student to approach you with any questions or needs related to the practicum. It will also help you to evaluate and discuss with your student both weaknesses and strengths and to provide the guidance necessary for progress.
- It is important for you to establish your **rules and expectations** for your student and then to **remain consistent**. It is also important that you set and maintain the **tone of your relationship** with your student. This will differ from preceptor to preceptor. Some wish a more formal relationship with scheduled appointments and/or proper forms of address (Mr., Mrs., etc.) Others have a more informal style. Both of

these or any in between can be effective. It is necessary, however, that your student knows what is clearly expected from you as the preceptor.

- It is vastly helpful for you to try to **see the practicum experience from your student's point of view**. You can do this by reflecting on times in the beginning of your career when you had similar experiences. Typically, your student will have both **anticipation and anxiety**. They will be excited about the expectation of learning in the "real world". The student will be anxious that he or she may not measure up. Asking your student direct questions will help you to understand his or her needs and expectations. These are some examples: How do you understand the role for which you are preparing? What fears do you have? What do you see as your strengths and weaknesses? What are the problems you are having right now? What are your plans for the next week? Can I help you get involved with staff, departments, committees, etc.? You will find many more. An **important thing to remember** is that until your **student** feels confident in their new environment, he or she will be **reluctant to ask** for what they need. Indeed, the student will often not know what it is that they need.
- As your student gains experience he or she will become more independent and need less direct supervision. As your student's knowledge, independence, and self-confidence grows, they will begin to see you, your staff, and your organization through different eyes. They will **realize that your organization and its people are human, with strengths and weaknesses**. The student's idealization of you and your organization will disappear. It is important that **you and your key staff help your student to accept this reality** and to revise their expectations. Failure to help your student through this transition may result in alienation that will greatly detract from the practicum experience.

Sometimes **students may have stereotyped negative images** of members of your staff. Your student may discount the intelligence and capability of people working at jobs they consider menial. **Help them to see past titles and status** and evaluate people by their behavior and actions. **Help them to see the value of each working role** in your facility. Help the student to see how such elitism will work against him or her in their future practice.

- Finally, we emphasize again that **your relationship with your student is the primary, essential ingredient in a successful practicum**. This does not mean that you must give inordinate time and attention to your student. It also does not mean that you cannot delegate some of your preceptor responsibilities to others on your staff. It does mean that a

relationship between you and your student needs to be established and cultivated that embodies those qualities listed previously: **mutual respect, trust, openness, honesty, and acceptance of risk**. It is also important that you remain accessible and establish regular contact time with your student and that you honor it.

### **Preparing the Way – Anticipating Your Student’s Needs**

If you want to succeed as a preceptor, attention to your student’s welcome and initial needs are of key importance. This requires thoughtful preparation before he or she arrives. Making sure your student is handled right during the first day and the first weeks of the practicum will do much to ensure his or her success. This may seem self-evident but is too often overlooked. The following suggestions will help you to effectively prepare for your student.

- **Review the practicum goals** as outlined in the Practicum Summary and the Learning Activities that comprise the Departmental Rotations which the student will be supplying you with and completing in the first half of the practicum, so that the roles to be played by you, your staff, and your student are fresh in your mind.
- **Prepare for your student’s physical needs:** office space and a desk, computer, phone, etc.
- **Plan** what will happen with your **student** on their **first day**. As we all know, first impressions are important to the success of any venture that requires people to work together. We suggest that you and your staff take steps to make your student feel welcome and to make him or her feel that the practicum experience is important to you and your staff.

It is **best** if you take the time to **greet your student personally** before he or she is introduced to others. This fosters a sense that they are important to you. A brief meeting (perhaps for coffee) on the first morning, at which your student is introduced to key staff members, is another good step. Your student should feel that they are important in the life of the facility and not just an added responsibility for others. Inclusion will facilitate your student’s success.

- **Prepare a schedule** for the **first few days or weeks** of the practicum. Since the first part of the practicum is devoted more to “fundamental skill needs,” such a schedule may be simply assigning your student to his or her first departmental rotation. The recreation/activities rotation is a common first rotation. This gives the student an opportunity to get to know the residents and be visible throughout the facility. We suggest the schedule also include attendance at some key committee meetings in order that your student

begins to feel involved in the administration of the facility. Arranging their full rotation schedule and **longer range planning** is your **student's responsibility**.

- **Plan** the frequency, length, nature, and purpose of your **regular meetings** with your student. We understand that your time is often strained, but it is essential that you make some time for your student. This need not be extensive. It may be a different amount for different meetings. Flexibility is essential to allow you to attend to other pressing duties. However, the simple fact is that your student will not do well without your regular attention. We do ask that you review your student's rotation packets with them following their completion of each one so the student gains your perspective as the administrator.
- **Plan** how you will evaluate **your student's performance and progress**. For each departmental rotation, there is a preceptor evaluation to be completed (which may also be completed with departmental head input), and there will be several other formal evaluations that will be done during the practicum as part of the students' series of Professional-Managerial-Leadership development coursework. These will be communicated with you directly, by faculty and students, over the course of the practicum. However, you will need to develop your own methods of monitoring your student in order that you can help him or her to progress. This may be as simple as making an informal evaluation during your regular meetings with your student. You should also support, yet not direct the student's formation of a practicum assessment committee. Other techniques are to request progress reports from department supervisors during your student's departmental rotations or to request that your student report and evaluate his or her own progress.
- Having planned how you intend to evaluate your student, you should **plan** also how you will encourage the student's **use** of the results of the **evaluations to help them** to learn and grow. Initially, you may want to take the lead by suggesting ways they can improve. As the student matures professionally you may ask him or her to reflect on the evaluation and propose to you ways in which they can improve.
- **Prepare your department management team and staff** for your student. Educate them about the practicum. Give them your expectations as to their roles and responsibilities with your (their) student.
- **Demonstrate to your staff your own commitment** to your student and his or her success. Let them know that this is a high priority for you and must be for them. Again, this need not require extensive time on your part or theirs. Your student has demonstrated competence in qualifying for the practicum. The student does not need constant attention. To succeed as an

administrator they need this experience to sharpen their own skills at learning, planning, and doing. You and your staff are more guides than teachers in the sense that your student has primary responsibility for his or her own success and for seeking out what they need from you.

### **Starting on the Right Foot**

The previous section of this guide made suggestions on planning for your student's arrival and for their first weeks. The following suggestions can help to accomplish your plans.

- **Welcome Checklist**

- **Personally welcome** your student on the first day of practicum. If you are not going to be on site, please assign someone in your absence.
- **Personally introduce your student** to your staff and your facility.
- **Consider assigning someone from your administrative or professional staff** with whom your **student can interact** more frequently and more informally than with you.

- **New Employee Orientation**

Having your student attend your new employee orientation is a good way for them to learn about the facility and about some of your policies and procedures. However, we believe this **should be delayed** for a few days during which your student can firmly identify as a member of the administration.

- **Policy/Culture**

Your student needs to know about policies and organizational culture that establish expectations for their behavior and appearance. We identify the following among these.

- **Behavior.** Your student should **know** your explicit expectations about how they should **behave toward superiors, other employees, residents, family members, government inspectors, and the general public** who may visit your facility. You should also instruct your student on how you expect a **professional to act in general**. To a degree, this is a matter of style. You may favor more formal, business-like behavior or something more informal. It is important that your student knows your expectations. Whatever your style, it will be good at some opportunity to inform your student that other

administrators have different expectations and that organizational culture will differ accordingly. Emphasize that your student's behavior reflects on your organization as a representative of administration.

- **Socializing with Employees.** Except for formalized occasions, it is recognized as **advisable for administrators not to socialize with their employees.** Your student must follow the same rule. However, the reasons for this should be carefully explained. The rule and the explanation should be repeated more than once so that your student understands. This may seem a simple matter, but it may be more difficult for a young and inexperienced person to understand why he or she should not socialize with employees, especially when many of them are in their age group.
- **Speech.** You and your staff should **assist your student to adopt the language of a professional.** Slang words and terms should be discouraged. Help your student to understand how important their speech is to the image that others have of them. Remind him or her that they are a representative of your organization and that you want their speech and behavior to reflect well upon you.
- **Dress and Appearance.** What are the **rules** or expectations in your facility **regarding dress** for those who do not wear uniforms? How are **administrative personnel** expected to dress? What about **body adornments**? Are there any expectations about **hair and makeup**? These are important items to address, especially with a group of individuals fresh off of college campus.
- **Hours.** The practicum is **scheduled for 40 hours for 50 weeks with one week of vacation.** Administrators do not always work 9:00 to 5:00. Meetings and other work outside of regular hours are necessary. We expect this also to be true of students to a lesser degree. You can ask your student to work outside regular hours when this advances his learning. For example, attendance and eventually participation in board meetings and professional meetings are to your student's benefit. (While we strongly encourage students not to have outside jobs during the practicum, some cannot continue without working. In such cases, you and primarily your student should work together to **minimize conflict between job responsibilities** and practicum duties.) When administrators spend such time after hours in addition to their regular hours, they may compensate, in part, by working fewer hours on other days. Opportunity for this practice should be extended to your student when appropriate.

- **Working at Your Facility.** Sometimes your student or you or both may want the student to take a **part-time job at your facility** after regular practicum hours. **This is discouraged** because of the conflict between your student's role as a member of the administration and his role as an employee. If this issue arises, **it is necessary to discuss it with the faculty supervisor. We have learned this practice raises numerous professional boundary issues for the student and staff.**
- **Preceptor/Student Relationship**
  - **Goals.** Ensure that you, your staff and your student **all understand the goals of the practicum.** Convey to your student any related goals that you have and explore with the student their own goals for the practicum and for a career. Remember that a good experience often combines three common elements to make a great educational environment for students and their sites. First, any activity a student engages in they can learn from, they are interested in, and the organization can benefit from this activity.
  - **Administrative Style and Philosophy.** Avoiding a lengthy discussion, let us acknowledge that **different people have different administrative styles** based on different philosophies and personalities. Some are more directive and controlling, some less. Some retain considerable authority, others delegate extensively. Some are comfortable with a well-established hierarchy, others with a minimum of formal chain of command. These and others are aspects of administrative style. Each is successful for some and not for others. **Two things** are important to **convey to your student.** First, clearly convey **your style and philosophy** since it greatly influences your expectations and many other aspects of the practicum experience. Second, **inform** your student **about other styles and philosophies** and explain them. It would be instructive to tell your student why you practice as you do. It will also be important for them to understand how necessary it is for themselves to develop their own consistent administrative style.
  - **Trust.** **Discuss** the issue of **trust** with your student **early and more than once.** Explain how your trust in your student is necessary for you to open yourself and your organization to them. Explain that trust grows and cannot be given all at once. Speak explicitly about how your trust can be gained. Discuss the need for you to win your student's trust in order that he or she can be open with you. Demonstrate behavior that conveys your trust as it grows.

- **Expectations.** **Explicitly convey your expectations to your student.** Give them in writing or have your student take notes. Get the same in return. Be sure both of you understand. Students flounder when they don't know what you expect or don't have a certain level of clarity.
- **Interactions with Other Administrative and Professional Staff.** What **roles** do you expect **others** in your organization to **play in** your **student's development**? Do these people understand their roles and your expectations? Does your student know what he or she can expect from these people? We find that most students generally end up being viewed and treated as a quasi department head and also learn a great deal from this group.
- **Commitment.** **Emphasize** to your student and staff **your commitment** to your student's success. Do it **more than once**. Convey **explicitly to your staff** what **commitment you expect** from them. Remember that their commitment will likely be only as strong as yours. The placement of a student in your organization will be a significant benefit to their departments and your organization, especially as the student begins to engage in more meaningful activities as the practicum progresses.
- **Communication.** **Establish open communication** with your student. Demonstrate that you are open to communication from him or her. Take responsibility for assuring that this happens. It is crucial to your success as a preceptor and to your student's success. It is too easy to let this slide.
- **Limits of Assistance.** **Explain the limits of what you and your staff can and will do** for your student. Your student's experience is only one of your responsibilities and, in truth, not the highest in priority. Your student is a young adult who has accomplished much in order to get to the practicum. He/she is seeking to become an administrator and leader. The primary responsibility for learning and growth belongs to him or her. The practicum is about becoming a self-directed and independent professional who can take responsibility for an organization and the people it serves. Your role is to guide and shape your student toward this.
- **Guiding Growth and Progress**

**Your role becomes** more that of **guide, mentor, and facilitator** once your student becomes established and comfortable in your facility. To be sure, you will teach and answer questions, as will members of your staff. Your primary function, however, will be to guide your student as he or she

acquires knowledge and skills. You will share your experience and wisdom to guide your student through the transition from academic preparation to professional competence. To this end we offer the following suggestions and observations.

Your responsibilities fall into these **three activities: mentoring and teaching, facilitating, and evaluation**, including assignment of levels of performance.

- **Mentoring and Teaching** should include:
  - **Meeting with your student regularly** according to the schedule you have established and at other times as needed.
  - When the student is ready, **including** him in your administrative activities. This might include committee meetings, business meetings, interactions with staff, etc. Explain to your student the reasoning behind your behavior and decision-making when appropriate and timely.
  - As your student begins to perform administrative and leadership activities, **coaching him or her** on how best to proceed. That is, how best to deal with a problem or situation, how best to interact with members of a team they must lead, how to plan for various types of activities, etc. Your student's assignments from their online coursework (e.g., departmental rotations, applied assignments/experiences in the "broader knowledge" categories and capstone leadership projects) will provide much opportunity for this type of coaching and guidance.
- **Facilitating** will include:
  - **Arranging and monitoring relationships** of your student with your staff.
  - **Assisting** your student in **selection of his Practicum Assessment Committee (PAC)**. Assembling and potentially **chairing the committee** for quarterly evaluations.
  - **Assisting** your student in the **selection/development** of their **leadership projects**. Please note that a good leadership project is something that the student can learn from, is interested in, and also serves a particular need of the organization.
  - **Assigning** the student to membership on **facility committees** and encouraging active participation.
  - **Assisting** your student in forming **contacts and relationships with other members of the profession**. This should include

- taking your student along to professional meetings whenever possible.
- Generally staying **aware of events and activities that will benefit your student** and inviting them in advance to take part.
- **Evaluating and Grading:** Preceptors will not be assigning any grades, but they will certainly play a role in evaluating the student in several formal ways across the three major areas of the practicum: **Fundamental Skills, Broader Knowledge Areas and Capstone Leadership projects.**
- Your **role in evaluating Fundamental Skills** is to determine your student's level of knowledge and performance during each departmental rotation by consulting the department heads and talking through rotation objectives/activities with your student as appropriate. You will complete a Preceptor Learning Summary Assessment for each of the departmental/service units, and the student will be responsible for forwarding this assessment to University faculty. All rotation assessments should be completed at approximately 6 months into the practicum experience. You will also be asked to supervise the student's taking of the NAB Practice Exam about 10 months into the practicum, which we use to assess their basic core competencies.
  - Your **role in the Broader Knowledge Areas** is not one of evaluation, but simply to help facilitate they get access to the types of experiences they need, in order to complete their applied assignments. This includes facilitating their Resident for a Day experience that occurs within their first few weeks on site, to allowing them to sit in on Quality Assurance meetings, hiring interviews, access to case-mix information and more. However, all assignments related to these experiences will be submitted directly to faculty and graded by faculty, so there is no preceptor evaluative component to the Broad Knowledge areas.
  - Your **role in evaluating the student's Professional Development and Leadership Projects** is to provide feedback as requested, periodically, on the student's development and offer suggestions regarding their Professional development plans, based on their relative strengths and weaknesses. Near the end of the practicum, you will also review your student's Leadership Project reports and evaluate their projects using the Leadership Project Evaluation tool. Finally, at the culmination of the practicum, you will complete a final evaluation of your student's overall performance and readiness to perform as an administrator moving

forward. Students and faculty will communicate any of these necessary evaluations with you proactively and directly.

- **Concluding Remarks**

- Your fulfillment in being a preceptor lies in helping aspiring young administrators to develop into capable managers and leaders, ready to begin successful careers. This fulfillment usually does not end when your students graduate. You have become a mentor to them. They will likely continue to seek out your advice and assistance as their careers progress. As more of your students graduate, you may continue to be the mentor that a group of young administrators look up to. If you have done a good job these new graduates and future administrators will carry on your mission of serving others by providing the best possible health care and other services, especially to the elderly. We trust that this interest in giving back to the profession is ultimately what drives your sincere interest in the students.
- In developing and revisions of this preceptor guide, we have sought the input of veteran preceptors, alumni, and others. Suggestions are always welcome. This document will be made available to you on the student online platform for their practicum. The information is also built into the preceptor training course.

- **Thank You**

We thank you, your staff and everyone associated with your organization for the vital opportunity that you give our students to learn. Without your assistance in providing this practicum experience, the Health Care Administration Program at UW-Eau Claire could not succeed. We also know your organization experiences both tangible and nontangible benefits of having a student. Lastly, we are proud to recognize that with your help we have become one of a handful of truly excellent educational programs in the nation today.

Thank you for your ongoing partnership and support.