A hot air balloon in the sky

Description automatically generated

**A blue circle with white text and a map and stars

Description automatically generated**



|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |
| Area of work |  |
| Preceptorship start date |  |
| Preceptorship completion date |  |

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**SOAR Preceptorship Programme Timetable/Planner**

|  |  |  |
| --- | --- | --- |
| Month | Class Title | Instructions |
| Monthly | Induction to Preceptorship | Team leader to book Preceptee on to 844 Preceptorship: Introduction to Preceptorship in the first month of employment |
|
|
|
|
| Various | Wellbeing Conversations | Team Leader to book Preceptee on to the 844 Wellbeing Conversation Training via ESR as soon as possible |
| Preceptee to complete a reflection or SOAR analysis following completion |
| Preceptee to discuss wellbeing with Preceptor |
| November  /March | Leadership and Professionalism | Team Leader to book Preceptee on to the 844 Preceptorship: Leadership and Professionalism Class on ESR |
| Following attendance at the class preceptee will need time to complete and reflect on the three leading self webinars on staff zone and listed below: |
| <https://staff.wirralct.nhs.uk/services-support/organisational-development/leading-self-online-master-classes-with-ed-hollamby/> |
| Then review the PowerPoint presentation 'becoming self-aware' webinar available on staff zone via the following link:  <https://staff.wirralct.nhs.uk/services-support/organisational-development/lqf/> |
| now review the leadership resources available on staff zone via the following link:  [Self-help tools and resources to strengthen self, team and leadership – StaffZone (wirralct.nhs.uk)](https://staff.wirralct.nhs.uk/services-support/organisational-development/self-help-tools-and-resources-for-all/) |
| Preceptee to share and discuss your reflections with your preceptor |
| December  /April | Effective Communication and Courageous Conversations | Team Leader to book preceptee on 844 Preceptorship: Courageous Conversations class on ESR |
| Preceptee to complete the course: 844 End of Life Care Communication Skills, bookable via ESR (if required for role) |
| Preceptee to reflect and discuss with preceptor |
| January  /May | Decision Making, Safe Practice and Quality Care Delivery within Teams | Team Leader to book Preceptee on to 844 Preceptorship: Decision Making, Safe Practice and Quality Care Delivery within Teams class on ESR |
| Preceptees can attend the Quality Improvement, Innovation and engagement faculty group and take any team QI projects. Preceptees should contact Quality Lead, [emma.carvell@nhs.net](mailto:emma.carvell@nhs.net) to arrange this |
| Various Dates | Supporting Others in Practiced | Nurse Team Leader to book Preceptee on to the 844 Practice Supervisor Workshop on ESR at t 6-7 Months |
| Nurse Team Leader should book Preceptee on to the Practice Assessor Workshop on ESR at 12-13 months |
| AHP preceptee to complete the NW Educator Toolkit e-learning modules.  The Learning and Development Co-ordinator will enrol the AHP Preceptee on these modules on ESR |
| Team Leader should book Preceptee on to the 844 Preceptorship Master Class on ESR at 12 months |
| September  /March | End of Preceptorship Graduation | Team Leader should book Preceptee on to the Preceptorship Graduation Class following final sign off from preceptorship |

**Introduction**

Preceptorship is a dedicated programme of structured transition, to guide and support all newly registered Allied Health Professionals (AHP), Nurses and Nursing Associates from student to autonomous professional to develop their confidence as an independent professional and to refine their skills, values, and behaviours (Skills for Health, 2013; HEE, 2018; HEE, 2017; NHSE 2022). This includes newly qualified, return to practice, and overseas educated professionals. Preceptorship is not a clinical competency programme. Clinical competencies are achieved via completion of role essential and mandatory training.

The SOAR preceptorship programme is a 12-month mandatory programme combining a series of structured group facilitated classes with the traditional one-to-one support from an experienced registrant known as a preceptor. Having access to both group and one-to-one support enables learning from best practice, and by providing opportunity to network with peers, facilitates the development of belongingness and job embeddedness, enabling newly registered professionals (NRP) to provide patient centred care, safely and confidently. The programme is benchmarked against the National Preceptorship Programme (NHSE 2022) and the North West Multi-Professional Preceptorship standards (2020) and is aligned to the organisation’s Leadership Qualitied Framework.

The SOAR preceptorship programme comprises a series of seven group facilitated sessions, online and face to face as well as access to several resources available on StaffZone. Additionally, you have an allocated, named preceptor who will meet formally with you, once every eight weeks for supervision that will take a coaching approach and enable you to identify your own learning needs and develop your own individual learning plan.

Everything that you need to plan, implement, and document your preceptorship period is contained within this handbook and portfolio. As an independent registrant it is your responsibility to ensure you are prepared for your one-to-one preceptorship and group facilitated meetings by completing your confidence self-assessment, SOAR analysis and reflection templates. Your individual learning plan should be completed by you, in partnership with your preceptor.

Following final sign off from your preceptorship you should arrange an appraisal and career conversation with your line manger to support your ongoing development and aspirations.

Finally, on completion of your preceptorship, you will be invited to attend the Team WCHC Awards, where you will receive your completion of preceptorship certificate.

**Objectives of Preceptorship**

* patients, clients, and service users receive safe and effective care
* ensure completion of competencies to develop knowledge, skills and professional attitudes and behaviours that are evidence based and congruent with organisational purpose, values, and leadership behaviours
* support and guide newly registered practitioners
* Completion of role specific training
* Completion of mandatory training
* Completion of structured group facilitated preceptorship meetings

**Transition and Change**

As a newly registered professional you are experiencing a high level of change within your professional and personal lives as you move from one state to another. Change can be complex, evoking a sense of instability. An individual may experience many emotions during times of change, such as fear, anxiety, and a sense of loss of control. If not managed effectively, change can be a negative experience for some. If managed well, change can result in many positive outcomes. Transition is the human process that we go through when managing change. The SOAR preceptorship programme is designed to successfully support you through your transition from learner to confident, independent, and autonomous practitioner. Remember, you may experience many emotions; don’t experience them alone. Discuss them with your preceptor and agree a plan for managing them and using them to generate positive outcomes. You will learn more about transition during the introduction to preceptorship facilitated group session.

**The Preceptorship Charter**

A preceptorship charter between the preceptee and preceptor should be agreed at the commencement of the relationship. This sets out the expectations of the preceptor and preceptee. If the preceptorship relationship is not facilitative and a change of preceptor is required, the line manager must be informed, and a new contract agreed with the new preceptor. A copy of the charter is found in appendix one – Preceptorship Portfolio.

**Raising Concerns**

Any professional concerns regarding a preceptee’s or preceptor’s clinical practice, values or behaviours must initially be discussed with the practitioner and then reported to the line manager the same working day; following Freedom To Speak Up process. The pathway for preceptor/preceptee concerns can be found in appendix two and three respectively.

**The SOAR Group Facilitated Learning Programme**

The Timetable/Planner for the group sessions and any preparation you will need to do for these is shown in the chart on page 1. Please review the timetable/planner and ensure you understand what is required and that you have agreed with your preceptor and line manager when you will complete, where appropriate, the pre and post session learning and attend the face-to-face sessions.

**Self-Assessment**

As an independent, autonomous practitioner you are required to lead your own learning and development. In preparation for all your preceptorship meetings you must complete a SOAR analysis and update the confidence self-assessment tool. All templates are included in appendix one – Preceptorship Portfolio.

**Reflective Practice**

**What is it?**

A conscious effort to think about an activity or incident that allows us to consider what was positive or challenging and if appropriate how it might be enhanced, improved or done differently in the future.

**Why is it important?**

Reflection helps us to think about and deliver high quality, safe care to our patients or clients.

**Principles of Reflection**

Explore what the nature of the practice/activity/accident/CPD activity or practice related feedback is, what you learn from it, how it might impact on your future practice and how it is relevant to your professional code.

**Reflection in and on action**

Reflection **in action** means to think about or reflect while you are carrying out the activity. It is typical when something is going wrong or you are nervous about something new or out of the ordinary, that you cannot help yourself thinking about it, but practitioners rarely formalise this process.

However, reflection **on action** means thinking about the practice undertaken after the event and turning that information into new knowledge.

**Models of Reflection**

There are many different frameworks or models of reflection that guide practitioners through the stages of reflection. Some of the most popular are:

* Gibb’s (1980)
* John’s (1994; 1995)
* Borton’s (1970)
* Driscoll (2000)

**Top Tips for Reflecting**

* Choose a reflective model or framework that suits you
* Be spontaneous – it is from a frank and honest self that important insights arise
* Express yourself freely – you don’t need to follow the normal academic practices involved in writing
* Remain open to ideas – early conclusions can hinder further insights and solutions
* Choose a time of day that suits you – you know when you are feeling prepared enough to spend quality time thinking about your practice. Good planning is essential so that you build in ‘reflecting on my practice time’
* Find a critical friend with whom you feel comfortable and whose decisions and judgement you trust. Your critical friend’s role is to challenge and provide feedback in a supportive manner (action learning sets are excellent opportunities for this)

In the process of reflection, you will use several personal and cognitive skills: self-awareness, description, critical analysis, and evaluation. You will find a reflective account form in appendix one – Preceptorship Portfolio. Registered nurses and registered nursing associates may prefer to use the NMC revalidation documentation to record reflections.

**Coaching**

Coaching is the unlocking of a person’s potential to maximise their own performance. It involves a belief that the individual has the answers to their own problems and supports the preceptee to build self-awareness. Coaching conversations empower choice and improve individual performance through powerful questioning that encourages the preceptee to come up with their own answers, leading to ownership, commitment, motivation, innovation, self-reliance and greater responsibility and accountability.

To facilitate a coaching approach during preceptorship meetings, the preceptor uses powerful questions such as those provided in the Trust’s Coaching Cards; Coaching Conversations: A model for effective practice learning. The preceptee is asked, not told and the conversation is solution focused, leading to the development of an action plan that the preceptee has developed themselves and feels committed to.

The Trust coaching cards utilise John Whitmore’s GROW model (Whitmore 2018). GROW is an acronym which describes the stages of the coaching conversation.

**References**

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**Appendix One**

**Preceptorship Portfolio**

**Charter Between Preceptor and Preceptee**

|  |  |
| --- | --- |
| **Preceptee** | |
| I understand my responsibilities as a newly registered practitioner and preceptee include:   * Completing all organisational and local induction, statutory, mandatory and role specific training * Attending study sessions and all required learning and development to complete my preceptorship * Observing and adhering to Organisational values * Participating fully in the preceptorship programme by preparing for and attending meetings as scheduled with my preceptor * Working collaboratively with my preceptor to share my reflections and identify learning and development needs * Seeking feedback from others to inform my progress * Owning my learning and development plan | |
| **Name:** | **Signature:** |
| **Work Area:** | **Date:** |

|  |  |
| --- | --- |
| **Preceptor** | |
| I understand my responsibilities as a preceptor include:   * Providing support and guidance to the newly registered practitioner * Acting as role model and professional friend * Facilitating introductions and promoting good working relationships * Participating in all preceptorship activities including attending training, facilitating, and documenting regular scheduled meetings * Providing timely and appropriate feedback to the preceptee * Liaising with line manager about preceptees progress as appropriate * Advising on learning and development needs, facilitating a supportive learning environment and signposting to learning resources * Completing and continuing my development as a preceptor | |
| **Name:** | **Signature:** |
| **Work Area:** | **Date:** |

**SOAR Analysis One**

SOAR analysis is a method of self-assessment used to identify strengths and needs for your role, and what opportunities you have, to achieve your desired results. To get the most out of the SOAR analysis you will need to be honest with yourself. Honesty will allow you to identify your individual aspirations which then enable you to formulate a personal development plan.

|  |  |
| --- | --- |
| **STRENGTHS:** What are your strengths? What can you do well? What do others say you are good at? | **ASPIRTIONS:** What are your aspirations? what do you aim to achieve during your preceptorship period? |
|  |  |
| **OPPORTUNITIES:** What learning, and development opportunities do you have to build on your strengths and achieve your aspirations | **RESULTS:** How will you know when you have achieved your aspirations? How will you evidence this? |
|  |  |

**Confidence Self-Assessment Tool**

The Confidence Self-Assessment tool is a tool for you to identify where you are now and track your progress over the next 12 months. There is no pass or fail, although the Organisation aspires for you to reach stage 4 of the framework by the end of the preceptorship period. Please click on the embedded spreadsheet below to enter your self-assessment stage with in the first month of preceptorship and then at 4, 8 and 12 months. Please discuss your assessment with your preceptor providing a rationale for your score. Any support needed to develop your level of confidence is agreed in preceptorship meetings and then handover to the line manager at the end of the preceptorship period. The spreadsheet will automatically save the changes when you close the document but please remember to save your preceptorship handbook to your ‘H’ drive before closing the document down.



**Individual Learning Plan (ILP) One**

**Developed in the first month of preceptorship**

The individual learning plan is used to record development needs and agreed objectives. Objectives should be SMART (specific, measurable, achievable, realistic/relevant and timebound)

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Learning need** | **SMART Objective** | **Support Needed** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Date should refer to the date the objective is set/date of meeting

Learning needs should come from the SOAR analysis and identified aspirations

There should be no more than three objectives for each ILP to be realistic

**Initial Meeting Template**

Once completed the preceptee should record this meeting in the relevant SAFE audit

|  |  |  |  |
| --- | --- | --- | --- |
| Name of Preceptee | |  | |
| Name of Preceptor | |  | |
| Work Area | |  | |
| Date of meeting | |  | |
| **Icebreaker Questions:**  Tell me a little about yourself. What do you enjoy doing? What are you looking forward to about your new role? What do you think is going to be challenging? How much do you know about preceptorship? | | | |
| **Expectations:**  What are your expectations of your new role? What development do you expect? What level of support do you expect from your preceptor? | | | |
| **Checklist**  **Onboarding**  **Local Induction Checklist**  **Using ESR**  **SOAR Analysis**  **Confidence self-assessment**  **Individual learning plan** | **Comments/Notes** | | |
| **Actions:** | | | |
| **Next Meeting:** | | |  |
| **Preceptee signature** | | |  |
| **Preceptor signature** | | |  |

**SOAR Analysis Two**

SOAR analysis is a method of self-assessment used to identify strengths ad needs for your role, and what opportunities you have, to achieve your desired results. To get the most out of the SOAR analysis you will need to be honest with yourself. Honesty will allow you to identify your individual aspirations which then enable you to formulate a personal development plan. Remember to review the Self Confidence Assessment Tool.

|  |  |
| --- | --- |
| **STRENGTHS:** What are your strengths? What can you do well? What do others say you are good at? | **ASPIRTIONS:** What are your aspirations? What do you aim to achieve during your preceptorship period? |
|  |  |
| **OPPORTUNITIES:** What learning, and development opportunities do you have to build on your strengths and achieve your aspirations | **RESULTS:** How will you know when you have achieved your aspirations? How will you evidence this? |
|  |  |

**Individual Learning Plan (ILP) Two**

**Developed in the fourth month of preceptorship**

The individual learning plan is used to record development needs and agreed objectives. Objectives should be SMART (specific, measurable, achievable, realistic/relevant and timebound)

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Learning need** | **SMART Objective** | **Support Needed** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Date should refer to the date the objective is set/date of meeting

Learning needs should come from the SOAR analysis and identified aspirations

There should be no more than three objectives for each ILP to be realistic

**Interim Meeting Template**

Once completed the preceptee should record this meeting in the relevant SAFE audit

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |
| Work Area |  |
| Date of Meeting |  |

|  |  |
| --- | --- |
| **Reflection and Discussion**  What has gone well? What challenges have you met? How have you overcome them? Consider use of reflection templates and sharing observations (it is recommended that five reflections are completed during the preceptorship period) | |
| **Review of Development**  What development/study sessions have you had? How have you found these? What has gone well? What have you found difficult? Are there areas you feel you need more development or experience in? | |
| **Review of Individual Learning Plan**  Review ILP set during previous meeting. Assess achievement against objectives and confidence self-assessment and where appropriate set further objectives | |
| **Comments/Notes:** | |
| **Actions agreed** | |
| **Next Meeting:** |  |
| **Preceptee signature** |  |
| **Preceptor signature** |  |

**SOAR Analysis Three**

SOAR analysis is a method of self-assessment used to identify strengths ad needs for your role, and what opportunities you have, to achieve your desired results. To get the most out of the SOAR analysis you will need to be honest with yourself. Honesty will allow you to identify your individual aspirations which then enable you to formulate a personal development plan. Remember to review the Self Confidence Assessment Tool.

|  |  |
| --- | --- |
| **STRENGTHS:** What are your strengths? What can you do well? What do others say you are good at? | **ASPIRTIONS:** What are your aspirations? What do you aim to achieve during your preceptorship period? |
|  |  |
| **OPPORTUNITIES:** What learning, and development opportunities do you have to build on your strengths and achieve your aspirations | **RESULTS:** How will you know when you have achieved your aspirations? How will you evidence this? |
|  |  |

**Individual Learning Plan (ILP) Three**

**Develop in the eight month of preceptorship**

The individual learning plan is used to record development needs and agreed objectives. Objectives should be SMART (specific, measurable, achievable, realistic/relevant and timebound)

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Learning need** | **SMART Objective** | **Support Needed** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Date should refer to the date the objective is set/date of meeting

Learning needs should come from the SOAR analysis and identified aspirations

There should be no more than three objectives for each ILP to be realistic

**Interim Meeting Template**

Once completed the preceptee should record this meeting in the relevant SAFE audit

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |
| Work Area |  |
| Date of Meeting |  |

|  |  |
| --- | --- |
| **Reflection and Discussion**  What has gone well? What challenges have you met? How have you overcome them? Consider use of reflection templates and sharing observations (it is recommended that five reflections are completed during the preceptorship period) | |
| **Review of Development**  What development/study sessions have you had? How have you found these? What has gone well? What have you found difficult? Are there areas you feel you need more development or experience in? | |
| **Review of Individual Learning Plan**  Review ILP set during previous meeting. Assess achievement against objectives and confidence self-assessment and where appropriate set further objectives | |
| **Comments/Notes:** | |
| **Actions agreed** | |
| **Next Meeting:** |  |
| **Preceptee signature** |  |
| **Preceptor signature** |  |

**SOAR Analysis Four**

SOAR analysis is a method of self-assessment used to identify strengths ad needs for your role and what opportunities you have, to achieve your desired results. To get the most out of the SOAR analysis you will need to be honest with yourself. Honesty will allow you to identify your individual aspirations which then enable you to formulate a personal development plan. Remember to review the Self Confidence Assessment Tool.

|  |  |
| --- | --- |
| **STRENGTHS:** What are your strengths? What can you do well? What do others say you are good at? | **ASPIRTIONS:** What are your aspirations? What do you aim to achieve during your preceptorship period? |
|  |  |
| **OPPORTUNITIES:** What learning, and development opportunities do you have to build on your strengths and achieve your aspirations | **RESULTS:** How will you know when you have achieved your aspirations? How will you evidence this? |
|  |  |

**Individual Learning Plan (ILP) Four**

**Developed in the final month of preceptorship**

The individual learning plan is used to record development needs and agreed objectives. Objectives should be SMART (specific, measurable, achievable, realistic/relevant and timebound)

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Learning need** | **SMART objective** | **Support needed** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Date should refer to the date the objective is set/date of meeting.

Learning needs should come from the SOAR analysis and identified aspirations.

There should be no more than three objectives for each ILP to be realistic.

**Interim Meeting Template**

Once completed the preceptee should record this meeting in the relevant SAFE audit

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |
| Work Area |  |
| Date of Meeting |  |

|  |  |
| --- | --- |
| **Reflection and discussion**  What has gone well? What challenges have you met? How have you overcome them? Consider use of reflection templates and sharing observations (it is recommended that five reflections are completed during the preceptorship period) | |
| **Review of development**  What development/study sessions have you had? How have you found these? What has gone well? What have you found difficult? Are there areas you feel you need more development or experience in? | |
| **Review of Individual Learning Plan**  Review ILP set during previous meeting. Assess achievement against objectives and confidence self-assessment and where appropriate set further objectives | |
| **Comments/notes:** | |
| **Actions agreed** | |
| **Next Meeting:** |  |
| **Preceptee signature** |  |
| **Preceptor signature** |  |

**Reflection Template**

It is recommended that five reflections are completed during the preceptorship period. The following reflection template is based on the work of Rolfe et al (2001). It has been designed as a simple way of learning from experience, evaluating the experience identified and further action. It can be used for reflecting on training and development classes or from clinical experiences.

Newly registered nurses and nursing associates may wish to utilise the NMC reflective template for revalidation available from [Reflective accounts form (mandatory)](https://www.nmc.org.uk/globalassets/sitedocuments/revalidation/reflective-accounts-form.doc)

|  |
| --- |
| **What?**  **What happened? What did I feel? What went well? What could have gone better? How did others respond? What were the consequences?** |
| **So what?**  **What did I learn from this? What did I base my actions on? What could I have done differently? What is my new understanding of the situation?** |
| **Now what?**  **What do I need to do differently? Are there things I need to learn or consider? What do I need to do next time?** |

**Final Sign-Off Meeting**

Once completed, the preceptee should record this meeting in the relevant SAFE audit and return a copy to the Preceptorship Lead: [wcnt.education@nhs.net](mailto:wcnt.education@nhs.net)

|  |  |
| --- | --- |
| Name of Preceptee |  |
| Name of Preceptor |  |
| Work Area |  |
| Date of Meeting |  |

|  |
| --- |
| **Reflection and discussion**  What has gone well? What challenges have you met? How have you overcome them? |
| **Review of development**  What development/study sessions have you had? How have you found these? What has gone well? What have you found difficult? Are there areas you feel you need more development or experience in? |
| **Review of Individual Learning Plan**  Review ILP set during previous meeting. Assess achievement against objectives and where appropriate, set further objectives |
| **Comments/notes:** |

**Preceptorship final sign-off declaration**

|  |  |  |  |
| --- | --- | --- | --- |
| **This confirms that the preceptee has completed all aspects of the preceptorship programme satisfactorily** | | | |
| **Name of Preceptee** |  | **Signature** |  |
| **Name of Preceptor** |  | **Signature** |  |
| **Preceptorship Lead** |  | **Signature** |  |
| **Work Area** |  | **Date** |  |

**Please follow the link below to complete the end of Preceptorship programme evaluation** [**https://www.smartsurvey.co.uk/s/MTJ0TN/**](https://www.smartsurvey.co.uk/s/MTJ0TN/)

**Appendix Two: Pathway for preceptor concerns**

Concern regarding professional practice, attitude or behaviour should be discussed with the preceptee, documented on an interim meeting template, and shared with the line manager

In partnership with preceptee, inform line manager of concerns the same working day

Preceptor may be involved in developing an action plan in partnership with the preceptee and line manager to resolve the issues identified

**Appendix Three: Pathway for Preceptee concerns**

Concern regarding professional practice, attitude or behaviour should be discussed with the preceptor, documented on an interim meeting template, and shared with the line manager

In partnership with preceptor, inform line manager of concerns the same working day

Line manager supports preceptee and preceptor to resolve issues

If issues cannot be resolved line manager appoints new preceptor