Evaluation Plan for Preceptorship in Your Agency

An evaluation plan is a guide for planning an evaluation of your preceptorship program. It outlines evaluation questions and associated indicators according to the following five evaluation themes:

1)	**Organizational culture and climate:** Including management and administrative processes that support preceptorship and student learning.
2)	**Learning environment:** Matching of students to preceptors and use of teaching/learning principles.
3)	**Agency-based educational program:** Examining how the agency supports students to apply and develop clinical skills.
4)	**Partnerships:** Developing links with patients and community resources, including connections with those outside of one's own profession.
5)	**Knowledge transfer:** Assessing application of knowledge and skills and evaluation of care provided.

It is recommended that data be collected on all five of the themes concurrently to obtain a clear overall picture of the interprofessional education program as it occurs in your agency. You may, however, have to modify or develop the plan according to your unique needs. The information in the evaluation plan is a summary of the information presented in all of the preceding sections of this website.

Evaluation Plan

Evaluation Themes	Evaluation Questions	Indicators
Organizational Culture and Climate		
Strategic Plan	How does the strategic plan support a preceptorship program?	Vision and mission statements include practice and education.
	How does the strategic plan support interprofessional practice and education?	Discipline-specific and interprofessional education is part of the strategic plan.
Performance Profile	How is student education identified in job descriptions and in the recruitment process of providers and staff?	Student education is part of the performance objectives of providers.
	What skills are identified as necessary for precepting?	Policies support the role of the preceptor.
		Policies recognize preceptors who are up-to-date with their knowledge/skills, understanding of scope/role of team members and are collaborative.
Policies	What types of policies assist preceptors to deliver the educational program?	Policies that support a preceptorship program are available and include policies on student orientation, crisis management, patient care and documentation.
		Policies support time off for preceptors to train, prepare for and fulfill preceptor role.
		Orientation for students includes identification of policies and procedures of the agency.
		Students have easy access to agency policies and procedures.

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Matching Strategy	How does the agency match the student's level of expertise with what is suitable in the organization?	Appropriate educational experiences are identified for student learning that match their skill level. Appropriate individuals are available to contact for further information if there are questions about the level of expertise required, or if there are concerns with student skill level. Students indicate the learning experience was appropriate.
Learning Environment		
Resources	What type of organizational infrastructure exists for patient care?	Adequate space for students to practice (i.e spare exam rooms, desk, chair, and phone) is available. Students have access to computer and internet resources. Patient information and organizational databases are accessible. There is access to the documentation system.

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Recruitment	What is the process for selecting preceptors in the agency?	Appropriate providers are selected to be preceptors according to the following criteria: • Is a clinically based professional; • Identifies interprofessional and discipline specific opportunities; • Shares knowledge and skills; and • Role models to socialize student to his/her discipline and interprofessional team. There is preceptor satisfaction with employer's process for negotiation of preceptor responsibilities. An adequate number of providers are available to take students of different levels of expertise. Preceptors are willing to take on students from a variety of disciplines.

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Appropriate Precepting	How is the role of the preceptor defined?	Employers and preceptors have established the role of the preceptor in the agency. The role includes key activities for preceptorship: 1) Provides orientation; 2) Assists with learning plan/ strategy; 3) Facilitates acquisition of knowledge and skills; 4) Provides feedback; 5) Encourages exposure to other clinical experiences and personnel; and 6) Partners with faculty. Preceptors are aware of the number of hours required not only for student education, but also training and preparing for the experience. Workload is adjusted to meet responsibilities of education. Appropriate proportion of preceptor time is spent in precepting. Proportion of staff time is spent in assisting students.

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Evaluation of Program	How is feedback on the preceptorship experience shared within the organization?	Performance indicators are identified and measured regularly. Results are communicated in a way that is timely and clear so that preceptors are able to continuously improve. The organization has a strategy to evaluate the preceptor experience from multiple perspectives including that of administrators, preceptors, staff, community stakeholders and other team members.
	How is the feedback from educational institutions shared with organizations?	Feedback from preceptor, faculty and site evaluations is shared and used for program planning and staff recognition in organizations. The organization in partnership with educational institutions participates in the development of curriculum and the role of agencies as a community partner. Evaluation tools identify relevant information for program planning and recognition. Verbal and written feedback to universities, educational institutions, government and professional organizations is provided. Annual review/report on the role of agencies in delivering preceptorship is submitted to key stakeholders.

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Agency-Based Educational Program		
Patient Care Delivery Model	Are patient services appropriate for the learning needs of the student?	Types of patients are appropriate. Services provided are appropriate. Appropriate programs fulfilling course expectations and the learning needs of students are available. Opportunities for students to engage in interaction with extended community (providers, organizations, research, and community initiatives) are available. Appropriate number of occasions and number of hours of interaction with providers other than preceptor including other team members, researchers and community care providers are provided.
Entry to Practice	Is there a strategy for preceptors to assist students' entry into the agency?	There is a strategy outlining activities and responsibilities for student, preceptor and faculty (pre-orientation, orientation, types of experiences based on course expectations, communication and expectations of evaluation). The strategy includes entry to practice issues and the impact of entry to practice issues on agency, educational institutions and preceptor-student relationships.

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Interprofessional Specific Experiences	Is there an interprofessional team-based model of practice appropriate for student education?	Patient care is delivered using a team-based model (interdisciplinary, multidisciplinary, transdisciplinary, consultative). Team demonstrates collaboration (mutual trust and respect, understanding of different roles, collective decision-making, shared planning and non-hierarchical relationships).
	Is there a process for students to develop an understanding of each other's roles, competencies and scope of practice?	Collaboration occurs between health care providers in the provision of patient care and supervision of students.
	Are students able to engage in interprofessional interaction?	There are many opportunities for students to engage in interprofessional learning. Students understand the scopes of practice of different health care professionals and are able to engage in team-based delivery of care.
	Is the preceptor emphasizing interprofessional education competencies?	Preceptors develop the interprofessional aspects of the student's practice by facilitating experiences in: • Empowering team dynamics; • Productive dialogue; • Understanding how to work with diversity; and • Appreciation of professional roles.

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	Is the preceptor aware of success indicators?	Preceptors use teaching/learning strategies that promote interprofessional practice. Preceptors have success indicators to evaluate the interprofessional aspects of the student's practice. Preceptors demonstrate appropriate teaching strategies to promote interprofessional practice. Preceptors have evidence-based tools and frameworks to promote competencies. Preceptors have online resources for interprofessional resources.
Team Acceptance	Is the team supportive of interprofessional education?	Team members are willing to participate in teaching students from different disciplines. Team members have a good understanding of various teaching/learning strategies for interprofessional education. Students are provided different opportunities to engage in learning together.
	How satisfied are preceptors with teaching students within a team context?	Team members are satisfied with teaching students. Primary preceptors are satisfied with sharing the teaching role with other team members.

Evaluation Themes	Evaluation Questions	Indicators
	What would the preceptor/ team do differently in the future to improve the interprofessional experience?	Team members provide feedback for improvement.
Discipline Specific Experiences	Is the preceptor aware of the course expectations?	Preceptor is aware of: 1) Terminal objectives and what the student must learn during the placement; 2) Course content; 3) Clinical application of course content; 4) Evaluation assignments; and 5) Expectations for number of patients, types of encounters, role development expectations, professional behaviours, and standards of practice. There is consistency in delivering education across settings.
	Is the preceptor aware of the evaluation process?	Preceptors are satisfied with the instruction they receive regarding evaluation using success indicators.
	Is the preceptor able to identify success indicators for the achievement of knowledge, skills and attributes?	Preceptors are satisfied with the instruction of how to evaluate using success indicators. There are annual discussions with preceptors on evaluation measures.
Conflict	How is conflict managed between preceptors, students and faculty?	Protocols for process for dealing with failing and difficult students are in place. Preceptors have training in conflict resolution and negotiation skills.

Evaluation Themes	Evaluation Questions	Indicators
Patient Safety	How is patient safety ensured in the educational process?	A process is in place to ensure patient safety, such as a patient safety strategy.
		Patient safety polices and strategies are reviewed in student orientation.
		Appropriate liability insurance is in place.
Partnerships		
Communication Networks	Does the organization have established communication networks?	Communication exists between agency and faculty using technology or through person to person conversations.
		Preceptors have a contact algorithm of who, when and how to contact faculty, as well as situations that require a site visit. Preceptors also have appropriate contact information for faculty members (telephone numbers, email addresses).
		There is efficient tracking of students.
		Recognition and incentives such as cross appointments and acknowledgement as a centre of excellence are in place.

Evaluation Themes	Evaluation Questions	Indicators
Knowledge Transfer		
Knowledge Management	What is the process for ensuring that preceptors have access to new knowledge?	Preceptors have access to relevant professional and academic journals. Preceptors have internet access. Preceptors are aware of time requirements and can take time off from service delivery to attend relevant rounds and presentations related to their field of practice. Preceptors incorporate current evidence when precepting students. Current evidence is incorporated into students' learning.
Professional Development of Preceptors	How are preceptors encouraged and supported to educate themselves about their role as preceptors and as health care professionals?	Preceptors have time and opportunities to educate themselves about adult learning and about their role as a preceptor. Preceptors are satisfied with incentives and recognition.
	What types of strategies are in place for support of the role?	Preceptors can access in-person workshops, courses, lectures and interactive educational supports on precepting skills. Organization provides support/assistance for continuing education.