

EFFECTIVE PRECEPTORSHIP

A GUIDE TO BEST PRACTICE



Canadian Association of
Medical Radiation Technologists
Association canadienne des
technologues en radiation médicale

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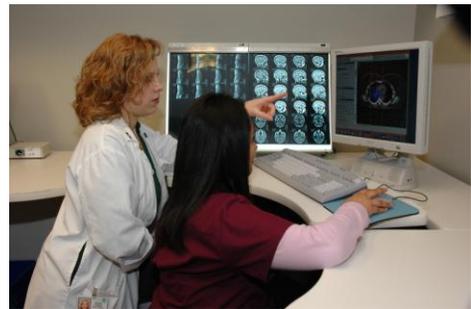
INTRODUCTION

Welcome to the CAMRT's Preceptor Training Guidelines.

If you are a preceptor or clinical educator teaching in a medical radiation technology program or a technologist thinking of embarking towards this role or a director/manager with or without a preceptorship program in your department, then this guide is for you, your department, and your program.

The process of becoming an effective preceptor starts with a sound knowledge of the role of the preceptor, the learning process, and strategies to accommodate diversity in learners. In this spirit, the recommendations presented here represent a springboard into establishing and sustaining an effective preceptorship program. This document contains the following sections:

- ***Rationale***
- ***Establishing Effective Preceptorship***
- ***Benefits of Precepting and Preceptorship***
- ***Roles and Responsibilities***
- ***Educational Topics***
- ***Resources***
 - ***Canadian Preceptorship Programs***
 - ***Other Preceptorship Programs***
- ***References***



This project is linked to the CAMRT Strategic Plan goal to ensure medical radiation technologists are prepared to work in an evolving health care system. These recommended guidelines are the result of the work conducted by five members of the CAMRT representing all four disciplines. They are from across Canada and have roles that include clinical, preceptor and didactic education, research, supervision, and direct patient care. The committee members also represent a diverse educational background that includes diploma, undergraduate, and graduate degrees.

This workgroup investigated numerous existing preceptorship programs and literature pertaining to preceptorship to aid in identifying the key elements of effective preceptorship as well as the support necessary to allow a technologist to practice as an effective preceptor. Some of these programs are included in the resources section. The nursing profession as well as numerous post-secondary institutes were found to be excellent sources of information about preceptorship and offer excellent learning opportunities. A listing of these programs and courses along with internet addresses is provided in the Resources section. Should your organization have a preceptorship program that is not listed and you wish to include it in this document, please contact the CAMRT.

RATIONALE

There are many scenarios within the clinical environment where individuals who are engaged in transition would benefit from having a role model to guide and support them. An effective preceptorship program can accomplish this for student technologists, new graduates, and technologists who are new to a particular role. All the elements of a preceptorship program are therefore applicable to all these scenarios.

The clinical component of a medical radiation technology program is arguably the most important part of the student technologist's education. It is during the clinical practicum that the student technologist develops the skills and attitudes necessary to become a competent practitioner. Those responsible for assigning students to practical settings must look very closely at the environment in which the practicum occurs.

Learners training in a clinical environment in which they receive guidance, instruction and have a positive experience will derive a great deal of satisfaction and reward during their training. They are likely to develop a positive attitude towards their chosen profession, commit to and value life-long learning. Such an environment suggests a positive atmosphere in which all those who interact with the learners would also find it rewarding.

When learners receive inadequate guidance, subjected to an unnecessary amount of stress, and consequently not acquire the competencies and attitudes necessary for success, then the learners' experience could be seen as negative and dissatisfying.

The primary individuals responsible for creating and sustaining a positive clinical environment are the preceptor and clinical leadership. A thorough understanding of roles and development of the needed characteristics and skills of a preceptor will help make it a rewarding, effective, and successful experience for all concerned. To this important end, the clinical leadership needs to ensure the development and support of preceptors in their respective clinical setting. To be effective, preceptors require an educational foundation, ongoing support, and time to precept. The continuous development of precepting and facilitation skills is a career-long challenge. The precepting stance should be dynamic, prompted by a spirit of inquiry, informed by evidence-based practice, and open to change.

The first step on the path to excellence in precepting is acknowledging that a personal framework for learning cannot be the only thing that informs the preceptor's facilitation of learning. There is a substantial body of research on what motivates and sustains learning. This can inform, support, and inspire one's practice of precepting.

The roles and responsibilities of the preceptor require specific preparation and support. An effective preceptor must develop instructing, interpersonal, and competency assessment skills. A comprehensive, theory-based education related to adult learning principles, effective communication, feedback, coaching, critical thinking, conflict management, reflective practice, and assessment must be obtained and practiced. Once this foundation is laid, the preceptor's effectiveness and that of the preceptorship should be evaluated on an ongoing basis, within a system that focuses on performance development for the preceptor, the learners, and the clinical/learning community.

ESTABLISHING EFFECTIVE PRECEPTORSHIP

Preceptorship is a learning opportunity for students and professionals in medical radiation technology to gain hands-on experience in a healthcare setting under the guidance of someone who is experienced in their field. Preceptorship facilitates the transition from didactic to the workplace environment and provides support for the new technologist in the work environment.



Preceptors with appropriate support and training will be able to:

- Provide a better learning experience for
 - Students
 - New graduates
 - Technologists in new roles
- Perceive precepting as a responsibility of their profession
- Role model for new preceptors in their facilities
- Gain enhanced job satisfaction
- Foster an environment that encourages trust, respect, openness, values and diversity

Effective preceptorship programs can positively impact the workplace as it creates a continuous learning environment. For the preceptor, it provides the opportunity to teach, influence practice, and broaden his or her own knowledge. For the learner, it provides the opportunity to develop and practice clinical skills with a clinical expert on a one-to-one basis, which leads to increased confidence. This will increase satisfaction and retention of the professional and new graduates.

An effective preceptorship program needs:

- Clearly identified roles and responsibilities
- The provision of time to precept
- Specific goals, expectations, and measurable outcomes
- Application of adult learning principles
- Structured learning strategies that foster the development of critical thinking and independent clinical judgment
- Constructive feedback strategies for ongoing communication and assessment by all involved
- Safe and positive learning environment
- The development of a teaching and learning culture that engages clinical staff as preceptors.

BENEFITS OF PRECEPTING AND PRECEPTORSHIP



There are many benefits to engaging in preceptorship. They are multi-faceted and affect multiple stakeholders. Traditionally, low faculty to learner ratios allow little time for in-depth teaching. However, a high faculty to learner ratio can be achieved through an effective preceptorship program. This results in improved guidance and direct clinical instruction for learners as more clinical staff become involved.

Benefits to the clinical facility through a shared responsibility for education and training will result in an improved quality of care delivery. Individuals who become a preceptor experiences greater professional satisfaction which impacts positively on themselves and the clinical employer – satisfied staff results in increased staff retention. Preceptees are given an opportunity to practice one-on-one with an experienced practitioner, which results in improved confidence and clinical skills. The following table highlights the many benefits to the various stakeholders.

Key Stakeholder	Benefits
Leadership <ul style="list-style-type: none"> • Employer • Clinical Facility 	<ul style="list-style-type: none"> ▪ Participate in a shared responsibility for education and training ▪ Increase satisfaction, and retention of students, graduates and staff ▪ Consistency and continuity of education and training in the clinical environment ▪ Opportunity for life-long learning and professional development ▪ Develop, and enhance practitioner skill sets resulting in improved quality of care delivery
Preceptor	<ul style="list-style-type: none"> ▪ Influence practice ▪ Increase job satisfaction ▪ Personal development and self-fulfillment ▪ Develop teaching, interpersonal and leadership skills ▪ Opportunity to teach and share professional knowledge and skills ▪ Enhance clinical skills through reflection on and evaluation of own practice ▪ Opportunity for life-long learning and professional development
Preceptee	<ul style="list-style-type: none"> ▪ Guidance and coaching by a clinical expert ▪ Reduced time to transition into independent practice ▪ Attain positive professional attitudes, behaviors and skills ▪ Increase psychomotor, communication, problem solving skills, assertiveness, and confidence ▪ Decrease stress and anxiety through a supportive teaching and learning environment

There are additional benefits for all clinical practitioners to become effective preceptors. They include the following:

- **Job performance** – preceptors excel on the job as they have extra incentive to examine their own work habits and outcomes.
- **Personal growth** – preceptors benefit from the relationships built with students as they become competent graduates.

- **Making a difference** – preceptors feel they are making a positive difference in their profession.
- **Connection with the training program** – preceptors stay current with the curriculum and have a voice in program decisions.

However, the benefits are more intrinsic in nature and valued differently depending on the individual.

Personal and professional satisfaction may increase as a result of:

Affective Benefits - such as:

- Enjoying precepting
- Feeling of usefulness and chance to re-energize the self
- Revitalized interest in work
- Receiving positive reaction from recipients of care
- Enhanced self-esteem and confidence
- Supporting and strengthening the profession
- Helping shape the next generation of professionals
- Increasing interaction and identification with other preceptors and peers
- Increasing interaction and identification with educational organizations

Cognitive Benefits - such as:

- Learning or relearning from preceptee and from their own teaching
- Learning about precepting through preceptor development and training programs
- Fulfillment of own developmental needs can lead to practice excellence
- Exposure to new and different thinking styles, knowledge and perspectives

Tangible Benefits - such as:

- Rewards
- Recognition

ROLES AND RESPONSIBILITIES

The purpose of a preceptorship program will determine the roles of the preceptors in the program. The roles of the other preceptorship participants should also be clearly defined, communicated, understood and standardized. The preceptorship participants are:

- Preceptor
- Preceptee
- Educational Institution
- Faculty Member
- Organization/Practice Department
- Staff Educator
- Preceptorship Program Leader/Coordinator
- Director/Manager/Supervisor
- Co-workers

The following table identifies the responsibilities as they relate to the various stakeholder roles.

Key Stakeholders	Participants	Responsibilities
Leadership Organization ▪ Educational Institutions ▪ Health Care Organization /Practicum Site	▪ Clinical Leadership (director, manager, supervisor)	<ul style="list-style-type: none"> ▪ Support, advocate and provide resources for preceptorship program ▪ Support and sustain effective clinical teaching environment
	▪ Didactic Leadership and Faculty	<ul style="list-style-type: none"> ▪ Facilitate the education and training of preceptors ▪ Evaluate the effectiveness of preceptorship ▪ Support the preceptor and preceptee with resources throughout the clinical training
	▪ Clinical Faculty	<ul style="list-style-type: none"> ▪ Facilitate, sustain and support preceptorship ▪ Evaluate the effectiveness of preceptorship ▪ Develop and maintain a respectful and inclusive environment
Preceptor	<ul style="list-style-type: none"> ▪ An experienced and competent professional 	<ul style="list-style-type: none"> ▪ Acquire the necessary education and training ▪ Act as a positive role model for the profession and demonstrates best practice and excellence in professional behaviours ▪ Orientate and integrate the preceptee into the profession and the clinical environment ▪ Provide support and opportunity for learning ▪ Respond to learner diversity and needs ▪ Develop and maintain a respectful and inclusive environment ▪ Instruct, supervise, assess and evaluate the preceptee ▪ Provide and receive coaching and constructive feedback ▪ Assist in the development of clinical skills ▪ Assist in the transitioning of the preceptee from learner to practitioner who are reflective decision makers ▪ Assist in the integration of theory with practice and consolidation of knowledge ▪ Collaborate with preceptee at all stages of preceptorship
Preceptee	<ul style="list-style-type: none"> ▪ An active learner who is engaged in learning from a preceptor 	<ul style="list-style-type: none"> ▪ Collaborate with preceptor at all stages of preceptorship ▪ Take initiative, demonstrate motivation to learn and apply best practice principles ▪ Be accountable and take responsibility for learning ▪ Acquire and develop clinical skills ▪ Integrate theory with practice and consolidate knowledge ▪ Transition to a reflective decision maker ▪ Integrate into the profession and clinical environment

Leadership Organization

Educational Institutions

Didactic leadership and faculty ensure that there is adequate academic preparation and a sound orientation to the preceptorship experience. They actively support the preceptor and preceptee with adequate time, facilities and experiences for the learning partnership to achieve success. They may provide and make accessible to the preceptors and preceptees resources such as:

- Orientation session materials and activities
- Teaching, learning and assessment strategies
- Continuing education workshops
- Forum for ongoing communication and coordination amongst all partners



Health Care Organization/Practicum Site

Clinical leadership actively supports the preceptor and preceptee with adequate time, facilities and experiences for the learning partnership to achieve success. They provide organizational support through the establishment of a welcoming, supportive environment that values learners, new staff, learning and individual/group development. They act as a liaison between preceptorship partners. They may provide resources such as:

- Continuing education workshops, in-services
- Library, computer, internet access

Directors, managers and supervisors within the clinical leadership are principally responsible for actively supporting preceptorship. They individually recognize preceptors for their positive contributions and acknowledge preceptors in their performance appraisals. As well, they participate in the evaluation of the preceptorship program and of the preceptor.

The clinical faculty is responsible for coordinating the preceptor program within or on behalf of a health care organization/practice department. They plan, coordinate and facilitate preceptor training and development. They may assign preceptee(s) to preceptors following consultation and discussion with individual preceptors. They collaborate with others to ensure evaluations, assessments are completed, collected and reporting occurs as planned. They promote networking between preceptors and other participants. And, they monitor and evaluate the preceptorship experience from the perspectives of the preceptee and the preceptor.

Preceptor

A **preceptor** is an identified experienced medical radiation technologist who provides transitional role support and learning experiences within a collegial relationship with a preceptee along with all other

responsibilities assigned to their position. The preceptor serves as a role model, facilitator, liaison, and educator.

As a role model, the preceptor demonstrates and personifies the skills and confidence in practice. They model ethical and professional behaviour. And, they are committed to self-learning and the learning of others.

Preceptors are also responsible for orienting and socializing the preceptee to the culture and value systems of the profession and the employer, which includes the roles and standards of the profession and the physical work environment. They facilitate the integration of the preceptee with their peer group, co-workers, professional agency and community. In addition, preceptors play a key role in orienting their co-workers to the goals and objectives of preceptorship.

In the role of educator, the preceptor will organize the learning experiences with the preceptee to facilitate progressive independence and allow a safe environment to apply new knowledge and skills. They will foster the integration of theory into practice, assist in identifying learning needs and understanding of the preceptorship expectations. Preceptors will give the preceptee ongoing, timely constructive feedback that relates practice standards to preceptee practice, communicate ongoing preceptee progress to other identified participants (such as faculty member, organization/practice department) and contribute to the preceptee's summative evaluation.

Preceptee

The **preceptee** is accountable for their learning within the preceptorship experience by demonstrating motivation and taking the initiative to learn and apply best practice principles. They are to collaborate with the preceptor in an attempt to model and integrate into the profession and clinical environment. The outcome of fully engaging is the acquisition and development of clinical skills, integration and consolidation of theory into practice, and the successful transition from learner to reflective medical radiation technologist.

EDUCATIONAL TOPICS

Without the valuable contribution of preceptors the healthcare community would not have the well-trained, entry-level graduates they do. Preceptors recognize the value of this important role. The healthcare community recognizes the competence of their preceptors and must strive to provide them with the additional skills related to instructing, coaching, and supporting learners. The educational topics described below collectively provide the skill and knowledge development necessary for effective preceptorship.

1. Adult Learning Principles and Concepts

The first step on the journey to excellence in precepting is acknowledging that a personal framework for learning cannot be the only source that informs a preceptor's instructing skills and strategies. There is substantial research on what motivates and sustains learning. This can inform, support, and inspire a preceptor's practice. An understanding of the adult learner and the learning process will assist the preceptor to determine how to best motivate and sustain learning in the learning community.

- a. Outcomes:
 - i. Meet the diverse learning needs of adult learners
 - ii. Facilitate a learning environment that values diversity and models empathy
- b. Major topics should include:
 - i. Learner diversity (prerequisites, culture, age, gender, previous experiences)
 - ii. Learning styles and modalities
 - iii. Learning strategies
 - iv. Experiential learning
 - v. Teaching skills/styles
 - vi. Motivation

2. Effective Communication Strategies

Effective interpersonal communication skills are critical to a learner's success. Sound interpersonal communication skills help the preceptor empathize with their learner's perspectives and contribute to creating a learning community where all learners have equal access to a successful learning experience.

- a. Outcome:
 - i. Apply reflective and interactive communication strategies to sustain and enhance learning
- b. Major topics should include:
 - i. Listening skills and techniques
 - ii. Verbal/nonverbal communication
 - iii. Dealing with complaints/criticism
 - iv. Mental models
 - v. Role and impact of emotion
 - vi. Trustworthiness; establish and maintain a trusting relationship; ethics; empathy; integrity; legislated responsibilities
 - vii. Power bases/boundaries

3. **Giving and Receiving Feedback**

By providing effective feedback, as well as eliciting and responding to feedback on precepting, the preceptor shows their learners that they can trust the preceptor and the preceptor's commitment to helping them to meet their learning goals.

- a. Outcome:
 - i. Give and receive feedback
- b. Major topics should include:
 - i. How feedback can enhance precepting and learning
 - ii. Best practices in feedback to enhance learning
 - iii. Feed-forward; constructive feedback
 - iv. Coaching

4. **Clinical Reasoning**

Technologists are expected to be more responsible, to work and collaborate with other healthcare professionals, and to make independent judgments and decisions. Clinical reasoning is a critical skill for medical radiation technologists. It is purposeful and goal-directed thinking; it is a cognitive process that leads to planned care and decisions for positive patient outcomes.

- a. Outcome:
 - i. Model and foster clinical reasoning
- b. Major topics should include:
 - i. Tenets of clinical reasoning
 - ii. Teaching of clinical reasoning
 - iii. The clinical reasoning processes

5. **Dealing with Conflict**

Constructing and sustaining working relationships is not always an easy task. Effective working relationships are built on recognizing and celebrating the uniqueness of the individual, on mutual respect and trust, and on a common understanding of purpose. A preceptor should anticipate conflicts, complaints, and criticisms as a very normal part of the learning process. A preceptor with a strategy for dealing with these can respond positively, empathetically, and courageously when these situations arise.

- a. Outcome:
 - i. Identify and apply strategies for managing the learning environment
- b. Major topics should include:
 - i. Conflict resolution strategies/models
 - ii. Types of conflict
 - iii. Causes of conflict
 - iv. Conflict prevention strategies

6. **Reflective Practice**

How does a preceptor know when they are precepting well? How does a preceptor know their students are learning? How could the preceptor's practice be made more responsive? Critically reflective preceptors can stand outside their practice and see what they do in a wider perspective. They develop and possess a well-grounded rationale for their practice, which can be called upon to help make difficult decisions in unpredictable situations. Seeing how we think and work through different lenses is at the core of the reflective practice process.

- a. Outcome:
 - i. Incorporate critical reflection into professional practice and into preceptor role

- b. Major topics should include:
 - i. Major tenets of reflective practice
 - ii. Reflective practice strategies and approaches

7. Assessment/Evaluation

Assessing learning is an essential component of the instructing and learning process. Adult learners need to know whether their behaviour, product, and performance align with the set learning outcomes. Preceptors need to know whether their proctoring strategies are tangibly supporting learning so they can meaningfully facilitate their learners' success. The respective institutions and organizations need assurances that learners being recommended for advancement into further studies or career paths are indeed ready to meet the challenges of working in the clinical environment.

- a. Outcome:
 - i. Incorporate and apply assessment strategies to support learning
- b. Major topics should include:
 - i. Purposes of assessment
 - ii. Formative/summative assessment
 - iii. Strategies and tools to evaluate learners, preceptor, department, program
 - iv. Authentic assessment
 - v. Assist learners

8. Orientation – Welcoming the Learner

Between learner and preceptor, the interaction required to promote a constructive learning experience is complex. First impressions and first-day events have a major impact upon the learners' perception of what the learning environment and the relationships with preceptor, other learners, and department personnel will be like. Identifying expectations and roles at the onset will help the preceptor shape the kinds of desirable behaviours required of the learners so that respective goals are achieved.

- a. Outcome:
 - i. Design and select first-day activities that create and promote a positive and safe learning environment
- b. Major topics should include:
 - i. Set stage for success
 - ii. Introductions; learning expectations, goals and strategies
 - iii. Create a positive environment, establish relationship, distinguish roles
 - iv. Power bases

RESOURCES

The following listing of Preceptorship Programs and/or courses is provided here for the user to investigate, consider, and potentially study.

CANADIAN PRECEPTORSHIP PROGRAMS

BC Academic Health Council

http://www.bcahc.ca/index.php?option=com_docman&task=cat_view&gid=83&Itemid=129

Canadian Association of Schools of Nursing

http://www.casn.ca/en/IEN_Project_and_Modules_34.html

Clinical Preceptorship Course

<http://www.radiationatpmh.com/body.php?id=177&cc=1>

Northern Alberta Institute of Technology

<http://www.nait.ca/66405.htm>

Southern Alberta Institute Technology

<http://sait.ca/pages/about/organization/departmentlistings/health/partnerships.shtml>

University of British Columbia

<http://www.health-disciplines.ubc.ca/pm/precepting/preceptorshiproles/overview.htm>

<http://www.health-disciplines.ubc.ca/pm/managingprograms/overview.htm>

University of Western Ontario

<http://www.preceptor.ca/>

OTHER PRECEPTORSHIP PROGRAMS

Vermont Nurses in Partnership Intern and Preceptor Development

<http://www.vnip.org/preceptor.html>

Southern New Hampshire

http://www.snhahec.org/preceptor_development.cfm

University of Virginia Health System

<http://www.med-ed.virginia.edu/courses/fm/precept/module2/m2p2.htm>

University of North Carolina / The Expert Preceptor Interactive Curriculum

<http://www.med.unc.edu/epic/welcome.htm>

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