



# Preceptor Learning Guide

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Structured conversations and bite-size learning in the flow of work



Franklin Covey®

THE ULTIMATE COMPETITIVE ADVANTAGE

# How to use this learning guide

- **Access your FranklinCovey accounts** – you'll need to log-in to both the All Access Pass Portal and the Jhana Microlearning site to use the resources in this guide. [Click here for instructions.](#)
- Different icons represent various learning elements, including an estimated time to complete where applicable.
- If you need support, you can:
  - Reach out to your employee education point of contact
    - 
    -
  - Contact the FranklinCovey support team at [vacare@franklincovey.com](mailto:vacare@franklincovey.com)



## Excelerators:

30-60-minute self-paced, eLearning modules. Includes downloadable tools and discussion questions.



## Insights:

5-15-minute self-paced, eLearning modules. Includes downloadable tools and discussion questions.



## Jhana Mentor Series:

Short, 2-4 minute videos containing short, practical tips and skills.



## Articles and Tips:

Resources from Jhana with key insights, tips, and short videos on a broad range of management challenges.



## Tools:

PDF documents to practice and apply the skills associated with each track.

# Table of Contents

Each topic in this Learning Guide has two components:

- **Structured Conversation** – tools and resources to engage your preceptee in meaningful conversations around specific subjects. These conversations should take no more than 20-minutes and can be completed anywhere.
- **Single-Point Lessons** – eLearning modules, tools, tips, and videos that you can use to:
  - **Develop** your own skill set around each topic
  - **Recommend** to your preceptee for developing their own skills
  - **Share** with co-workers to inspire conversation around critical soft skills

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# Precepting and Leadership

Many of the skills and tools in this learning guide are offered through the lens of leadership. At FranklinCovey, we know that management is a position, but leadership is a choice. We believe that every individual can lead from wherever they sit in an organization.

## **As a preceptor or mentor, you are a leader because you influence:**

- **Productivity** – your instruction and guidance influences the way work gets done on your team. You help new team members understand necessary systems and processes.
- **Veteran experience** – the people you support will be the face of VHA for the Veterans they interact with throughout their career. The quality of your precepting influences healthcare outcomes and the overall Veteran experience.
- **High Reliability Organization** – by demonstrating and reinforcing the principles of high reliability, you ensure that new employees are committed to zero patient harm from day one.
- **Employee Experience** – you are VHA for the employees that you support. The effectiveness of your role as a preceptor influences the quality of their experience.
- **Loyalty and retention** – an high-quality experience early on builds employee loyalty. We know that loyalty is one of the best predictors of retention. You influence VHA's ability to keep top talent.



# Preceptor, Mentor or Coach?

While this resource is titled as a Preceptor Learning Guide, we want to acknowledge that this learning can also be useful for mentors and coaches. VHA's Core Coach/Mentor Training distinguishes between these three roles as defined by the tables below:

<b><u>Coaching</u></b> - <i>working in the partnership to facilitate learning, improve performance, and create desired results.</i>	<b><u>Precepting</u></b> - <i>teaching, instructing, supervising, and serving as a role model for a new employee for a set period, in a formalized program, by an experienced practitioner.</i>	<b><u>Mentoring</u></b> - <i>the process for a subject matter expert to share wisdom, developing a less experienced person.</i>
Time-limited but usually longer timeframe	Time-limited	No timeframe, can be lifelong
About process rather than task	Task or goal oriented	No objectives, goals
Return demonstration	Return demonstration	No return demonstration
Competency and relationship-based	Competency based	Relationship-based

While these roles have significant distinctions, we also know that they are all enhanced by developing in the three topic areas included in this learning guide – Psychological Safety, Coaching and Feedback, and Diversity and Inclusion.

# Psychological Safety - Introduction

## What is psychological safety?

A belief that one will not be punished or humiliated for speaking up with concerns, mistakes, questions, or ideas. When our behavior supports an environment of psychological safety, it builds trust, reinforces belonging, and supports HRO principles.

## Why does it matter in your role as a preceptor?

- You create the culture for learning that centers the preceptee
- You develop the meaningful teaching plans
- Empower and support preceptees to develop professional skills and meet goals
- To foster an environment that supports everyone's HRO 'Duty to Speak Up'

## How do the All Access Pass learning resources support psychological safety?

In these modules, you will find suggestions and strategies that optimize the psychological safety of the preceptee. The goal is to create learning opportunities where preceptees feel safe to learn and explore, along with being empowered to practice their professional skills.












# Psychological Safety

A belief that one will not be punished or humiliated for speaking up with concerns, mistakes, questions, or ideas.

**Structured Conversation:** Have a 'Develop Trust Talk' to establish a baseline of respect and confidence.

Prepare	Engage	Reflect and Commit
<ol style="list-style-type: none"> <li><b>Complete</b> the 30-minute eLearning, '<a href="#">Relationship Trust</a>'</li> <li><b>Download</b> the '<a href="#">13 Behaviors Cards</a>'.</li> <li><b>Review</b> card 27 ('Develop Trust Talk')</li> <li><b>Identify</b> three important behaviors to share with your preceptee</li> </ol>	<ol style="list-style-type: none"> <li><b>Schedule</b> 10-20 minutes with your preceptee for the trust talk</li> <li><b>Share</b> the '<a href="#">13 Behaviors Cards</a>' and declare your intent. If possible, ask them to pick three important behaviors before your talk. You can also give them time during the talk.</li> <li><b>Follow</b> the 'Develop Trust Talk' script with your preceptee</li> </ol>	<ol style="list-style-type: none"> <li><b>Review</b> the three behaviors that your preceptee shared</li> <li><b>Identify</b> how specifically you can model those behaviors in your relationship</li> <li><b>Commit</b> to practice the new behaviors</li> <li><b>Schedule</b> a reminder to check on progress in 4-6 weeks</li> </ol>

**Single-Point Lessons:** Choose from the options below to build trust and psychological safety in a variety of ways.

eLearning	eLearning	eLearning	Tip Video	Tip Video	Article	Article	Tool	Tool
 <a href="#">Create Space for Others</a>	 <a href="#">Take Stock of Your Emotional Bank Accounts</a>	 <a href="#">Extend Trust</a>	 <a href="#">Refresh your relationship with a disengaged direct report</a>	 <a href="#">Establish yourself as approachable</a>	 <a href="#">Embrace your next mistake as a chance to gain respect</a>	 <a href="#">How to earn trust</a>	 <a href="#">Worksheet: Repair a Relationship</a>	 <b>Explore More:</b> <ul style="list-style-type: none"> <li><a href="#">Trust</a></li> <li><a href="#">Building Relationships</a></li> </ul>

*\*numbers indicate the estimated time investment for each eLearning module, video, or article*

# Coaching and Feedback - Introduction

## What is coaching?

Coaching is a mindset and skillset that builds *capability* instead of *dependence*. It focuses on helping others solve problems and improve performance in specific areas. The coaching framework you'll learn in this section can be implemented anywhere, anytime.

## What is feedback?

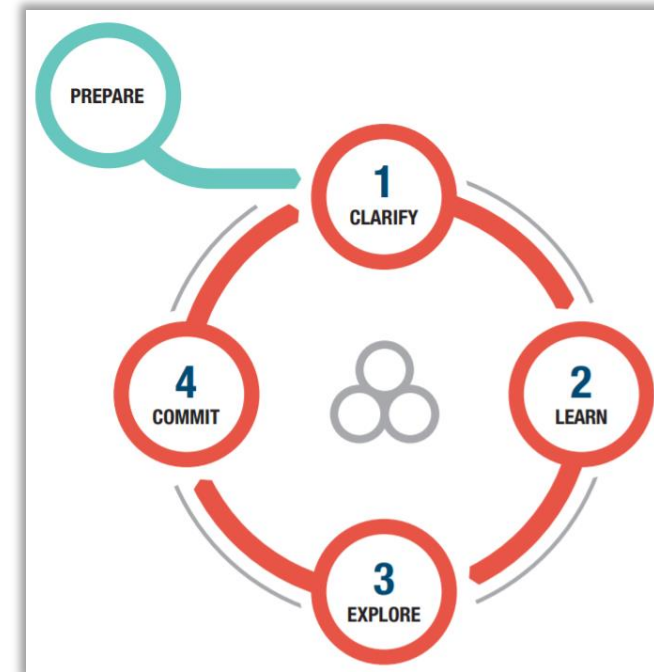
Feedback is a mindset and skillset we can use to reinforce or redirect behavior in the moment. Regular feedback creates a cadence of continuous improvement and builds trust in the relationship. To be effective, reinforcing and redirecting feedback must be both *given* and *received*.

## Why do these skills matter in your role as a preceptor?

- Your interactions and conversations shape and guide the development of skills
- Preceptees maximize their learning experience from your honesty
- The delivery of the feedback is just as important as the feedback itself
- It supports the HRO values of 'Learn, Inquire, and Improve', 'Respect for People', and 'Clear Communication'

## How do the All Access Pass learning resources support coaching and feedback?

The modules associated with this will help you explore your strengths in providing coaching and feedback, along with providing you with some information and practice to improve.





# Coaching and Feedback

Provide effective feedback and coaching to preceptees about how they are progressing and how they can improve that is **frequent, specific, and constructive**.

## Structured Conversation: Implement the coaching framework to build capability and independence.

Prepare	Engage	Reflect and Commit
<ol style="list-style-type: none"> <li><b>Complete</b> the 30-minute eLearning, '<a href="#">Unleash Your Team's Potential Through Coaching</a>'</li> <li><b>Download</b> the <a href="#">coaching cards</a> and review the coaching skills you might use.</li> <li><b>Invest</b> 5 minutes to think through the <a href="#">coaching conversation</a> using page 2 of these instructions.</li> <li><b>Identify</b> one whole-person question from the <a href="#">voice conversation</a> tool to ask your preceptee.</li> </ol>	<ol style="list-style-type: none"> <li><b>Schedule</b> 10-20 minutes with your preceptee for a coaching conversation.</li> <li><b>Share</b> your intent, then agree on a desired purpose for the conversation.</li> <li><b>Follow</b> the 'Coaching Framework' process from page 7 of the '<a href="#">coaching cards</a>' pdf.</li> <li><b>Commit</b> to a follow-up conversation at a specific time in the future.</li> </ol>	<ol style="list-style-type: none"> <li><b>Reflect</b> on the coaching conversation. Was the purpose achieved? What was left unsaid?</li> <li><b>Identify</b> how specifically you can act on your commitments to support your preceptee.</li> <li><b>Include</b> topics from the coaching conversation in your daily interactions.</li> <li><b>Schedule</b> a reminder to prepare the next conversation.</li> </ol>

## Single-Point Lessons: Choose from the options below to bring coaching and feedback into your daily interactions.

eLearning	eLearning	eLearning	Article	Article	Article	Article	Tool	Tool
								
<a href="#">Make it Safe to Tell the Truth</a>	<a href="#">See the Tree, Not Just the Seedling</a>	<a href="#">How to give reinforcing feedback that's actually useful</a>	<a href="#">How to build coaching into your day</a>	<a href="#">How to give redirecting feedback</a>	<a href="#">4 phrases to take the fear out of giving tough feedback</a>	<a href="#">Feedback discussion gets emotional</a>	<a href="#">Worksheet: Giving Feedback Planner</a>	<b>Explore More:</b> <ul style="list-style-type: none"> <li><a href="#">Giving Feedback</a></li> <li><a href="#">Difficult Conversations</a></li> </ul>

*\*numbers indicate the estimated time investment for each eLearning module, video, or article*

# Diversity and Inclusion - Introduction

## What is diversity and inclusion?

*“Diversity is being invited to the party. Inclusion is being asked to dance.” – Verna Meyers*

As we think about diversity, equity, inclusion and belonging, the goal is to ensure that as preceptors, we are creating the conditions under which our preceptees and all whom we work with can perform at their best, where they feel respected, included and valued. This section of the learning guide is designed to help you identify blind spots, expand your perspective, and continue the journey towards a full spectrum of diversity and inclusion.

## Why does it matter in your role as a preceptor?

### For the Preceptees

The preceptees will be from different backgrounds and life experiences. It is important to have a skill set that helps create an environment where they feel meaningfully included, that their cultural backgrounds are valued, and personally respected so they are empowered to optimize their learning experience. Practicing these skills also helps you model the HRO principle, ‘Respect for People’.

### For the Veterans

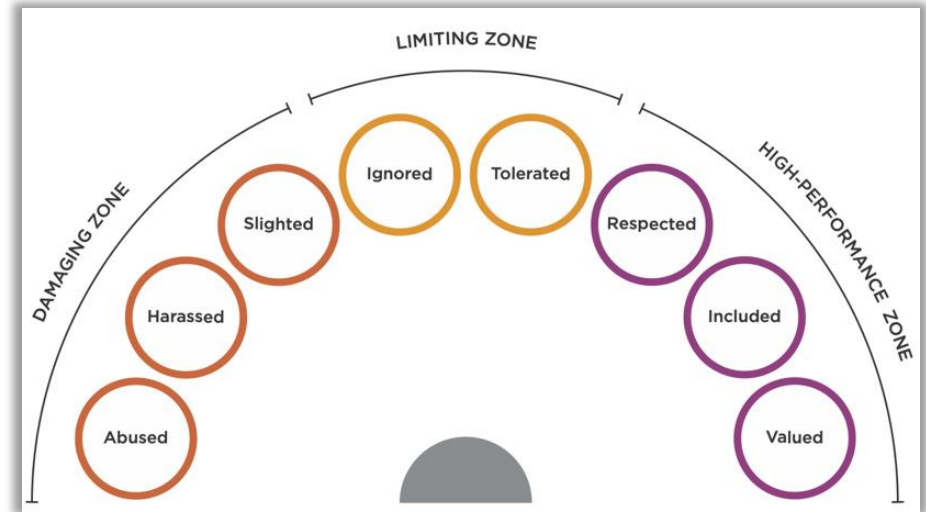
The Veterans are diverse from diverse backgrounds. It is important to model how to support the Veterans. First, you need to have the skill and cultural competence to provide appropriate care. You must also be able to teach preceptees how to provide both advocacy and culturally appropriate support for the Veterans they serve.

### For the Co-workers

In the VA system, the preceptees will be working with people from different cultural backgrounds. Developing cultural humility in the preceptees will help them to build meaningful relationships, know how to develop a culturally responsive work environment, and be able to identify barriers and resources that people from different cultural backgrounds may face. When combined, these shape a positive work experience for all co-workers.

## How do the All Access Pass learning resources support diversity and inclusion?

You will find modules that help to develop your own cultural self-awareness, along with some strategies to help preceptees develop self and cultural awareness.



# Diversity and Inclusion

Embrace the diversity of thought, experience, and identity of others to create a culture of belonging and innovation at VHA.

## Structured Conversation: Establish a common language for addressing bias and embracing diversity in a busy environment.

Prepare	Engage	Reflect and Commit
<ol style="list-style-type: none"> <li><b>Download and complete</b> this <a href="#">short self-assessment around unconscious bias</a>.</li> <li><b>Complete</b> the eLearning module, '<a href="#">Identify Bias</a>'</li> <li><b>Consider</b> how your biases might influence interactions with your preceptee (<i>how you respond to mistakes, share information, give/receive feedback, assess readiness, etc.</i>).</li> <li><b>Identify</b> three questions from the '<a href="#">practice cards</a>' (p. 5, 7, &amp; 9) to help you disrupt biased thinking.</li> </ol>	<ol style="list-style-type: none"> <li><b>Schedule</b> 10-20 minutes with your preceptee for a coaching conversation.</li> <li><b>Watch</b> the video, '<a href="#">Your Brain and Bias</a>' together</li> <li><b>Share</b> personal insight about bias and your role as a preceptor. Use one or two of your 'I am' statements as an example.</li> <li><b>Review</b> the 'Impact of Behaviors' model from p. 2 of the <a href="#">practice cards</a>. Ask your preceptee to share which zone they are in currently, and why.</li> </ol>	<ol style="list-style-type: none"> <li><b>Reflect</b> on the co-learning and discussion. Where did you feel vulnerable?</li> <li><b>Consider</b> how you can keep your preceptee in the High-Performance zone, or shift them there if they are in Limiting or Damaging?</li> <li><b>Identify</b> where you need to challenge your own biases to help your preceptee succeed.</li> <li><b>Schedule</b> a follow-up conversation to check progress and share new insights.</li> </ol>

## Single-Point Lessons: Choose from the options below to bring coaching and feedback into your daily interactions.

eLearning	eLearning	Video Tip	Assessment	Article	Article	Article	Tool	Tool
 <a href="#">Cultivate Connection</a>	 <a href="#">Intentional Multipliers</a>	 <a href="#">3 things you can do to foster inclusion on your team (or with your preceptee)</a>	 <a href="#">What are your 'Accidental Diminisher' warning signs</a>	 <a href="#">9 ways to embrace diversity of thought - and why you should</a>	 <a href="#">6 ways to give your team (or preceptee) space to speak, take risks, and excel</a>	 <a href="#">Recognize and amplify good ideas</a>	 <a href="#">Worksheet: Difficult Conversation Planner</a>	 <b>Explore More:</b> <ul style="list-style-type: none"> <li><a href="#">Addressing Unconscious Bias</a></li> <li><a href="#">Difficult Conversations</a></li> </ul>

\*numbers indicate the estimated time investment for each eLearning module, video, or article