Initial meeting template

|  |  |
| --- | --- |
| 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  Organisation induction  Clinical induction  Local induction  SLOT analysis\*  Individual learning plan\* |  |
| Comments/notes: | |
| Actions: | |
| Next meeting: |  |
| Preceptee signature |  |
| Preceptor signature |  |

\*SLOT and ILP templates included

SLOT analysis

A SLOT analysis is a simple tool to evaluate the preceptee’s current stage of knowledge, skill and experience and to assess development needs along with opportunities and barriers.

|  |  |
| --- | --- |
| Strengths  *What do you do well? What knowledge, skill and experience do you have? Consider attitudinal strengths.* | Learning Needs  *Are there any gaps in your learning or experience? Do you need more experience in anything? Consider personal, clinical and professional development.* |
| Opportunities  *What development opportunities are available? Consider shadowing, training, working with others, and research.* | **Threats**  *What are the barriers? Consider time, workload pressures, personal commitments, and energy levels.* |

Individual learning plan (ILP)

The individual learning plan records 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 SLOT analysis and should identify specific needs.

There should be no more than three objectives for each ILP, in order for it to be realistic.