Transforming the Professional Practice of Nursing: Design & Implementation of an Electronic Portfolio

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2015 ANCC National Magnet Conference ®
Session C927
October 9, 2015 - 9:30am to 10:30am

Children’s Hospital Colorado (CHCO)

✓ Delivering pediatric health care since 1908
  o Affiliated with University of Colorado School of Medicine and College of Nursing
✓ 17 Locations throughout Colorado
✓ 534 Inpatient Beds
✓ 2,000 Registered Nurses
  o 90% Bachelors Degree or higher
  o 47% Direct care nurses certified
✓ Magnet® Designation Since 2005

Learning Objectives

1. Illustrate the importance of ongoing learning and professional development in nursing practice

2. Outline the five step process of designing and implementing an electronic portfolio

3. Identify the pearls and pitfalls when introducing an innovative electronic portfolio
Definition of Portfolio

“A private collection of evidence, which demonstrates the continuing acquisition of skills, knowledge, attitudes, understanding and achievements. It is both retrospective and prospective, as well as reflecting the current stage of development and activity of the individual.”


Background

New Graduate Nurse Residency Program

✓ Commission on Collegiate Nursing Education (CCNE)
  Standard for Accreditation of Post-Baccalaureate Nurse Residency Programs

Standard III-C.6. Professional Development
The role of the professional nurse is constantly evolving and requires a commitment to lifelong learning. The program is designed to provide the resident with the tools to develop a personal plan for professional development to advance the individual’s experience, knowledge, education, and continued ability to contribute to quality health care.

Nurse Credentialing Review Board (NCRB)

Purpose: Assure professional accountability for clinical practice and maintenance of established standards.

Professional Career Advancement Program
✓ Appoint and re-appoint the credentials of Level I-Level IV Clinical Nurses practicing at CHCO.
✓ Paper Applications
Portfolio Goals

Develop a career plan that promotes a life-long commitment to professional nursing

Documentation of growth and development
What you know & have learned/experienced
Your plan in moving forward

Tool to guide professional nurses through the clinical ladder at Children's Hospital Colorado

Design and Implementation Process

Literature Review
Selection of Web-Based Software Program
Design of Portfolio
Pilot
Education
Implementation

August 2013
January 2015

Literature Review

- It is imperative that organizations retain, develop, recognize, and reward the extraordinary work of nurses. (Pellico & Violario 2010)
- Ongoing learning and professional development is essential to maintain the skills and knowledge needed for current practice. (Thompson 2012)
- A portfolio is a method to validate accomplishments in an interactive and multidimensional way. (Byrne et al. 2009)
- Professional portfolios demonstrate reflective critical thinking, lived experiences, narratives, and intrapersonal understanding that illustrate competence. (Byrne et al. 2008)
- One of the undocumented benefits has become that portfolio users are learning the value of lifelong learning. (Thompson 2012)
Software Considerations

- Electronic
- Cost
- Time Commitment
  - Cost of software and time to learn new programs
- Security

Explored existing programs at the hospital including:
- Learning Management System
- SharePoint
  - Interdisciplinary Collaboration-SharePoint Site Administrator IT
  - Storage Space
  - https://support.office.com/en-us/article/What-is-SharePoint

SharePoint

- Microsoft
  - Purpose: Create Websites
- Requirements:
  - Software Purchased
  - Web browser (Internet Explorer)
  - Store
  - Organize
  - Share
  - Access

Portfolio Considerations

- ANA Scope and Standards of Practice: Pediatric Nursing
- Quality Safety Education for Nurses (QSEN) Competencies
- Colorado Nurse Practice Act
- Magnet® Model Components
- Professional Practice Model at CHCO
- Nursing Code of Ethics
- (CCNE) Standard for Accreditation of Post-Baccalaureate Nurse Residency Programs
- Nursing Annual Requirements
- Clinical Ladder Requirements
Portfolio Index

**PROFESSIONAL GOALS**
- 2-year plan to accomplish requirements of clinical ladder
- On reapplication – reflect on completion of 2-year plan (how you did or did not meet your plan) and create new 2-year plan

**RESUME/CURRICULUM VITAE**
- Complete Demographic Form (electronic form in SharePoint)
- Upload completed Curriculum Vitae (CV)/Resume

**LICENSE/DEGREE/CERTIFICATIONS**
- Scan and upload:
  - Nursing license
  - Highest nursing degree or transcript
  - Magnet approved certification
  - Life support certifications

**PROFESSIONAL ORGANIZATION**
- CN I, CN II and CN III – scan and upload membership card
- CN IV – Scan and upload membership card and evidence of active participation

**SHARED GOVERNANCE**
- Evidence of active involvement in unit based and/or division of nursing (or inter-professional) shared governance committees and activities
- Provide documents demonstrating the outcome of participation in an inter-professional initiative/program (project template, materials produced, data, minutes from meetings)

**PROFESSIONAL PRACTICE MODEL/MAGNET**
- Choose one of the options below:
  - Exemplar – personal reflection on how you exemplify the PPM
  - Exemplar demonstrating how you fulfill one of the five components of Magnet model
  - Exemplar describing your philosophy of nursing

**FAMILY CENTERED CARE**
- Choose one of the options below:
  - Exemplar demonstrating family-centered care
  - Exemplar demonstrating critical thinking

**PROFESSIONAL CONTRIBUTIONS & DEVELOPMENT**
- Submit evidence of scholarly activities: posters, presentations, publications
- Submit evidence of projects or initiatives (lit. review, education materials, policy/procedure, exemplar of change in practice, outcomes/audit data)
Portfolio Index

COMMITMENT TO LEARNING AS A LIFE-LONG LEARNER
- CE certificates
- Evidence of active school participation (transcripts, grades)

SERVICE TO COMMUNITY
- Evidence of involvement in community activities (Required for CN III)
- Minutes
- Example of experience
- Brochure, handout

AWARDS/HONORS/ SCHOLARSHIPS
- Nominations
- Awards
- Recognition
- Letters or thank you notes from patients/families or colleagues

LETTERS OF RECOMMENDATION
- CN III Manager Signature Page
- CN IV Leadership Signature Page
- NEW CN IV ONLY – Three letters of recommendation

2 YEAR PLAN — CN III
Education is a 2-projects, 1-quarter plan that meets all 2 categories in the Essential Functions.

1. Project on the organisation you are planning to work in (must be submitted by 12/15)

2. Project on the problem - What is the problem and what are the causes? What is the solution? What are the stakeholders involved? Why is solving it important?

3. Project on the plan you are proposing to make a change, what you propose? Then enrolling into the idea (theoretical/methodological)

4. Project on the experience - Will you complete an existing project or trainee with something new? What is the standard and what is the change?

5. Project on the outcome - What are you hoping to achieve? Demonstrated or improved? How will this be measured and compared? When will you complete? What is the outcome? How will you know you were successful? (translational)

EXEMPLAR TEMPLATE

What is an exemplar?
An exemplar is an example or model of a product, project, or practice. It serves as a reference for others to understand and replicate. It demonstrates excellence and best practices. It provides a benchmark for others to aspire to.

Inclusion:
- A description of the exemplar
- A detailed explanation of the concept, process, or project
- A comparison of the exemplar with similar practices
- A reflection on the success of the exemplar
- A summary of the benefits and limitations of the exemplar

Include in your Exemplar as appropriate to the Essential Functions:

1. Project:
   - A specific project and its outcomes
   - A description of the project and its components
   - A detailed explanation of the project's goals and objectives
   - A comparison of the project with similar projects
   - A reflection on the success of the project

2. You may also include:
   - A summary of the benefits and limitations of the project
   - A reflection on the impact of the project on the exemplary model
   - A comparison of the project with similar projects
   - A reflection on the success of the project

3. You may also include:
   - A summary of the benefits and limitations of the project
   - A reflection on the impact of the project on the exemplary model
   - A comparison of the project with similar projects
   - A reflection on the success of the project

Add comments, feedback, and suggestions for improvement.
Pilot New Grad Program Coordinator & NCRB

Approval to start Pilot
New Grad Program
Cohort (RN=25)
March 2014

Education Tool
Education Tool/Process Map

Rubric for Portfolio Reviewers

Portfolio Education

• This workshop is designed to assist nurses in developing their electronic professional portfolio in SharePoint.
  • Objective:
    • Describe how to access and build a nursing professional portfolio in SharePoint.
    • Discuss components of the portfolio index

• This session is designed as an open session to allow nurses to build their portfolio at a computer with NCRB facilitators present to answer questions.
  • Objective:
    • Demonstrate and build a nursing professional portfolio in SharePoint.
**Portfolio Education**

- **Portfolio Workshop**
  - 22 Sessions at 5 Sites
  - 340 Nurses

- **Portfolio Party**
  - 4 Sessions
  - 23 Nurses

- Website Created
- NCRB Member Support
- Various One-on-One sessions
- Sustainability: Future Sessions Quarterly in 2016 & Beyond

**Portfolio Education Evaluation**

The portfolio workshop met my education needs.

![Pie chart showing survey results]

- **Strongly Agree**: 39%
- **Agree**: 53%
- **Disagree**: 7%
- **Strongly Disagree**: 1%

**Kurt Lewin Stages of Change**

- Presented concept to Nurse Credential Review Board & Nursing Leadership
- Promoted dialogue among clinical nurses and leaders
- Addressed concerns
- Collaborated with IT
- Provided support to NCRB

- Created portfolio index, education tools, defined process and uploaded to website
- Created pilot group and obtained feedback
- Created full implementation plan with education and shared with key stakeholders
- Resisted and monitored the implementation process
- Collected feedback and revised tools as needed

- Provided ongoing support with new standardized process
- Provided ongoing support and education on portfolio development
- Created sustainability plan to include introduction in New Graduate Nurse Residency Program and education workshops
- Presented our work
### Pearls

- Addressed learning needs assessment gaps
- Professional development & goal setting
- Standardized electronic application process
- Nurses are humble and sometimes need support in thinking about all of the great work they do in order to enter into portfolio
- Improved reliability in application review process
- Cost saving utilizing existing software SharePoint
- Simplified renewal process

### Pitfalls

- IT Knowledge
- Amount of education and support needed
- Time commitment for NCRB
- Cost
- Change-inclusion along the journey & multiple changes all at once (ladder essential functions & process for application)

### Outcomes

- Increased manager involvement
- Increase in project alignment & documentation
- New graduate nurse exemplars & goal plan
- Increase of CN IV nurses

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09/10/15
Outcomes

Clinical Nurse Data

Pre-Portfolio Post-Portfolio

NCRB Feedback

The electronic portfolio enables me to review applications with efficiency.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

The electronic portfolio enables me to review applications for completeness.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>10</td>
<td>0</td>
<td>0</td>
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NCRB Feedback

I am satisfied with the time commitment required to review portfolio applications.

✓ “I love the streamlined process and standards set for all levels of the ladder.”

✓ “There is consistency in format among applicants, electronic instead of paper!”
NCRB Feedback

✓ “Easy to review anytime and anywhere, the portfolio parties were very helpful.”

✓ “I would love to see an electronic application process that could include manager approval, demographics and an on-line rating system for the NCRB. This would enable us to have an ongoing record of review.”

I feel confident I can appraise the quality of work completed and/or upcoming projects in the portfolio.

[Bar chart showing responses: 5 Extremely Confident, 5 Reasonably Confident, 1 Somewhat Confident, 1 Not At All Confident]

NCRB Feedback

“The electronic portfolio has been a huge improvement over the paper process.

✓ I have seen so much more engagement from managers as their staff go through this process.

✓ It has increased overall awareness of the project work going on in the hospital.

✓ I also see that the electronic process will aid in keeping nurses accountable for accomplishing their goals and maintaining their project work.”

Conclusion

The success of the portfolio would not be possible without the NCRB members, all of whom have a passion for supporting nurses in their professional development.
Acknowledgements

- Donnya Mogensen- MS RN-BC, Nurse Residency Coordinator
- Jeanine Rundquist- DNP RN NEA-BC, Director of Performance, Practice & Innovation/Magnet® Program Director
- Children's Hospital Colorado Nurse Credential Review Board

References
