

Performance Evaluation Tool for the Practice Setting: Cross-setting Expectations for the CNLsm Graduate (How will you know one when you see one?)

The following criteria pertain to performance, not role. It is the expectation that the performance of nurses prepared at the advanced generalist master's level and certified as a Clinical Nurse Leader (CNL) will meet the following criteria, independent of the specific role or title to which they are assigned. These criteria assume that CNLs also meet all of the expectations associated with excellent staff nurses. The criteria also assume that newly graduated CNLs will begin their careers as novice CNLs, not as staff nurses, and that their performance as a CNL will evolve over their first year of employment. Finally, examples of quality performance indicators are outlined at the end of this document. For all indicators, it is expected that each CNL will maintain and assemble documentation of personal and professional growth for periodic performance assessments. It also is suggested that performance assessment includes systematic peer evaluation, intervention team evaluation, client evaluations and, when appropriate, learner/educator evaluations.

As Team Manager & Clinician¹

- 1. Effective and comprehensive management of client (individual, family, community) care**
 - a. Assumes accountability for client welfare
 - b. Identifies client risks based on a comprehensive assessment and evaluation
 - c. Collaborates with the client in designing and executing the total care plan, explaining the plan with reference to the evidence and seeking the client's suggestions, understanding and endorsement.
 - d. Consults appropriately with other health professionals in designing the plan of care or intervention.
 - e. Communicates the care plan to other members of the intervention team, seeking their recommendations and then delegating appropriately
 - f. Advocates effectively on behalf of the client with the intervention team and with the client's network

As an Outcomes Manager

- 2. Oversees the management of specific micro-system populations**
 - a. Identifies and becomes knowledgeable about microsystem client populations
 - i. Acquires information about the population through local information systems
 - ii. Seeks knowledge through reference literature and current journals, etc.

¹ The CNL Role Functions identified for each expected performance area reflect the CNL Role Functions in the AACN "End-of Program Competencies for the Clinical Nurse Leader" March 2006

- b. Identifies population-level clinical/health problems
- c. Uses information systems to collect and review outcome measures routinely used to measure outcomes
- d. Identifies and resolves population-level clinical/health problems
- e. Engages intervention team in evaluating progress in achievement of desired outcomes

As a Team Manager

3. Integrates and mobilizes the clinical/intervention team to assure both excellence and comprehensiveness of care.

- a. Meets regularly with the clinical/intervention team
- b. Evaluates their performance based on client outcomes
- c. Creates and revises the care plan in collaboration with the team and assures that all members are fully informed
- d. Shares knowledge from reference and journal literature to improve care

As a Clinician, Outcomes Manager & Systems Analyst/Risk Anticipator

4. Assesses the microsystem and deploys its resources appropriately to improve outcomes

- a. Evaluates the entire microsystem and how it fits with the work of the larger organization (e.g. the high cost and high volume activities).
- b. Evaluates the capacity of the microsystem resources to accomplish the work of the unit
 - i. Appraises the human resources available to the microsystem to accomplish the work (e.g. nursing staff, pharmacy, dietary, medical consultation, custodial)
 - ii. Assesses formal and informal organization and operations of the microsystem, including deployment of resources.
 - iii. Assesses the material and communication resources available to accomplish the work of the microsystem
- c. Deploys unit resources effectively in the care of clients and the improvement of population-level clinical outcomes

As a Team Manager, Clinician & Information Manager

5. Practices in a cost-effective manner

- a. Identifies waste in the system and opportunities for cost (material, time, personnel) savings
- b. Uses technology effectively to reduce cost and enhance clinical outcomes
- c. Sets priorities to work efficiently while not compromising quality
- d. Presents and is open to ideas for revenue enhancement that will benefit clients
- e. Proposes modifications in microsystem using business models including return on investment

As an Educator

6. Participates in the clinical education of CNL students, novice CNLs, and other nurses, as an educator, mentor and preceptor

As an Outcomes Manager, Educator, and Systems Analyst/Risk Anticipator

7. Translates research and clinical outcome studies into practice

- a. Is current in literature related to microsystem practice
- b. Participates in microsystems review and analysis of past trends to project risks to client safety and quality of care outcomes
- c. Uses evidence to challenge and modify existing policies, protocols and care maps
- d. Introduces evidence into practice through education of intervention team and relevant professional staff
- e. Incorporates evidence-based practice changes into information and integrated documentation systems
- f. Communicates evidence-based practice modifications to other health professionals.

As an Educator, Team Manager, and Advocate

8. Provides clinical leadership within the microsystem

- a. Promotes professional development of the team members
- b. Assures continuing education of the team members
- c. Educates microsystem staff, e.g. grand rounds, innovative practices, etc.
- d. Participates in performance evaluation of intervention team members.

As an Advocate, Member of the Profession, and Outcomes Manager

9. Assumes leadership in organizational governance and professional activities

- a. Represents the microsystem on organizational committees
- b. Is a member, and eventually leader, in relevant professional organizations
- c. Disseminates microsystem successes in care management to larger nursing community

As a Clinician and Team Manager

10. Knows and applies organizational mission, values and strategic plan

- a. Practices in accordance with the values of the organization
- b. Uses strategic plan to guide practice
- c. Participates in development of mission, value statement and strategic plan

As a Team Manager and Advocate

11. Monitors and advocates for social justice in microsystem activities.

As a member of the Profession

12. Engages in professional development activities

Quality Performance Indicators

Peer evaluations (inter and intra-professional co-workers)

The CNL:

- *Consults appropriately with nurse specialists (CNS, NP) and members of other professions (medicine, pharmacy, physical therapy, etc.)*
- *Engages professional peers in plan of care*
- *Keeps consultants informed on client progress*
- *Consultation reflects comprehensive knowledge of client*
- *Provides consultation and assistance to peers*

Intervention team evaluations

The CNL:

- *Is accessible to team members*
- *Is credible about the client*
- *Is knowledgeable about the particular health or clinical problem(s)*
- *Invites participation from all team members*
- *Communicates care plan clearly with rationale*
- *Educates team members*
- *Meets regularly with team,*
- *Is respectful of the contribution of each team member*
- *Encourages and provides for continuing professional development (team should be more qualified this year than last year)*
- *Assists team to solve problems effectively*

Client evaluations

The CNL:

- *Provides satisfying, high quality care*
- *Advocates appropriately*
- *Introduces the members of the intervention team and explains the role of each*
- *Is knowledgeable about the problem, consults the literature and answers questions*
- *Engages the client and network in the planning and implementation of the care/health plan*
- *Is accessible to the client and network*
- *Educates the client and network how to manage health/clinical problem*

Supervisor evaluations

The CNL:

- *Keeps the supervisor informed regarding client progress, plans of care, modifications or unusual events, and team performance issues*
- *Is accountable and available via flexible hours to address client needs*
- *Plans and implements care that is effective, comprehensive, based on evidence, and has clearly defined outcomes*
- *Identifies relevant population-based problems*
- *Identifies patient cohort risks and areas for quality improvement*

- *Demonstrates currency of knowledge about identified client populations (e.g. reads current journals and translates to work)*
- *Uses information systems effectively to solve problems, evaluate self and team performance*
- *Seeks better clinical/health outcomes, elimination of errors, and reduction in costs and operational waste*
- *Reviews protocols and procedures for consistency with latest evidence*
- *Engages in effective intra and inter-professional consultation and collaboration*
- *Develops and coordinates a knowledgeable, proficient and well-organized team*
- *Team functions well during crises and stressful periods*
- *Delegates appropriately*
- *Creates more effective systems reflecting knowledge of the nature and volume of work, the human and material resources available, and sound business practices related to cost and return on investment*
- *Integrates mission, values and organizational strategic plan into personal and team practice*
- *Serves effectively in microsystem governance*
- *Represents the microsystem effectively in the larger organization*
- *Demonstrates a spirit of retention and problem solving and encourages other micro-system personnel to do the same.*
- *Assumes responsibility for educating, mentoring, guiding and evaluating novice CNLs, CNL students and other nurses.*
- *Monitors care plans and operations for social justice and takes appropriate action.*

Faculty/learner evaluations

- *Provides rationale for practice*
- *Creates learning opportunities for students to practice CNL objectives*
- *Accessible to student and academic advisor*
- *Meets with academic advisor routinely and as needed*