American Association of Colleges of Nursing

CNL℠ Toolkit Table of Contents

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Introduction

The Eight-Stage Process to Creating Major Change:

Clinical Nurse Leader℠
An Emerging Role for Nursing in the 21st Century

The CNL was developed by the American Association of Colleges of Nursing (AACN) in response to complexities of health care environments, the need to ensure safety and high standards at the point of service, as well as to meet diverse client and health care environment needs. The CNL is prepared as a master's prepared generalist accountable for clinical and health care environment outcomes. The Clinical Nurse Leader (CNL) is a leader across all settings at the microsystem level (patient unit, community zip code area, school setting, nursing home specific area, etc). The CNL oversees care coordination of a distinct group of patients, is a resource for clinical decision making and serves as a lateral integrator of care. This clinical leader puts evidence-based practice into action to ensure that patients benefit from the latest innovations in care delivery. The CNL collects and evaluates patient outcomes, assesses cohort risk, and has the decision-making authority to change care plans when necessary. This clinician functions as part of an interdisciplinary team by communicating, planning, and implementing care directly with other health care professionals, including physicians, pharmacists, social workers, therapists, clinical nurse specialists, and nurse practitioners. The CNL is a leader in the health care delivery system across all settings in which health care is delivered, not just the acute care setting. Implementation of this role will vary across settings.

Competencies and clinical learning experiences for CNL students are specified for each of the following CNL role components: client advocate, member of a profession, team manager, information manager, systems analyst/risk anticipator, clinician, outcomes manager, educator, and life long learner. The CNL designs and directs care within a microsystem ensuring best practices are brought to the point of service and patients/clients receive timely cost efficient care. Lateral integration of services is key. The CNL is accountable for clinical and care environment outcomes as well as influencing work environments so as to increase nurse retention. The framework for the curriculum for the CNL includes the domains of leadership, clinical outcomes management, and care environment management. The curriculum guide can be accessed at www.aacn.nche.edu/CNL/pdf/draftcurriculumframework4-06.pdf. The CNL role is fully described in AACN's *Working Paper on the Role of the Clinical Nurse Leader (2004)*.

Incorporating the CNL requires a transformation in practice. Specifics of the process of this transformation may be unique to each institution. Resistance is inherent in any major change so patience and perseverance are key leadership attributes in implementing this new role. Kotter (1996) suggests that the first four steps in the transformation process help defrost a hardened status quo. Phases five to seven introduce new practices. The last stage grounds the changes; makes them "stick."

Stage I. Establishing a Sense of Urgency

A. Examining the market and competitive realities.

B. Identifying and discussing crises (real and potential) problems to be addressed and major opportunities.

C. Avoiding complacency

D. Suggested References

1. Presentations

    a. PowerPoints - AACN-CNL Web site

    b. Bednash, P. **Changing the Face of Nursing**

2. Books/Articles

    a. AACN, (2002) Hallmarks of the Professional Nurse Practice Environment

    Hallmarks brochure

    b. AACN. (2003). Working White Paper on the Role of the Clinical Nurse Leader.

    c. Agency for Healthcare Research and Quality (AHRQ): Nursing Research; Nurses at AHRQ; Research Funding; Tools and Resources

    d. AHRQ: Quality Tools News

    e. American Hospital Association Commission on Workforce for Hospitals and Health Systems. (2002). In our hands, how hospital leaders can build a thriving workforce. Chicago, IL: American Hospital Association.

    f. Beginning the Work: Implications for the Practice Environment Video Presentation by Dr. Gail Wolf

    g. Buerhaus, P., Staiger, D.O., & Auerbach, D.I. (2000). Implications of an aging registered nurse workforce. *Journal of the American Medical Association*, 283, 22.

    h. Drenkard, K. (2004). The clinical nurse leader: A response from practice. *Journal of Professional Nursing*, 20 (2), 89-96.

i. Institute for Healthcare Improverment (IHI) initiatives

j. Institute of Medicine. (1999). To Err is Human: Building a Safer Health System. Washington, DC. National Academies Press.

k. Institute of Medicine. (2001). Crossing the quality chasm. Washington, DC. National Academies Press.

l. Institute of Medicine (2004). Keeping Patients Safe: Transforming the work environment of nurses. Washington D.C. National Academies Press.

m. Joint Commission on Accreditation of Healthcare Organizations. (2002). Healthcare at the crossroads. *Strategies for addressing the evolving nursing crisis*. Chicago.

n. Leapfrog Group for Patient Safety

o. Rusch, L. & Bakewell-Sachs, S. (2007). The CNL: A gateway to better care? *Nursing Management.* 32-40.

p. Sanford, J., Hall, P., & Roussel, L. (2007). The clinical nurse leader: new role in nursing. *Mississippi RN*, *69* (1), 17.

q. Tornabeni, J. (2006). The Evolution of a Revolution in Nursing. *Journal of Nursing Administration*, 36(1), 3-6.

Next, Stage II

Stage II. Creating the Guiding Coalition

A. Putting together a group with enough power to lead the change

B. Getting the group to work together as a team

C. Establishing academic-practice partnerships

D. Identifying outcomes-end points as targets of success

E. Suggested Reference

1. Implementation Task Force

    a. Curriculum guide

    b. CNL End of Program Competencies & Required Clinical Experiences

2. University and Practice site partnership executive steering committees

3. Articles

    a. AACN. (2002). Hallmarks of the Professional Nurse Practice Environment.

    b. Begun, J.W., Tornabeni, J., & White, K.R. (2006). Opportunities for improving patient care through lateral integration: The clinical nurse leader. *Journal of Health Care Management*, 51(1), 19-25.

    c. Drenkard, K., Cohen, E. (2004). Clinical Nurse Leader: Moving Toward the Future. *Journal of Nursing Administration* (34).

    d. Hansten, R. (2001). Outcomes-Based Care Delivery. *AJN*. February.

    e. Gabuat J., Hilton, N., Kinnaird, L.S., & Sherman, R.O. (2008). Implementing the clinical nurse leader role in a for-profit environment: a case study. *Journal of Nursing Administration*, *38*(6), 302-307.

    f. Gibson, S.R. (2006). Clinical nurse leader- the value to an organization: Perspective from nurse administrators. *Virginia Nurses Today*. *13*, 16.

    g. Mancher, T. (2001). A better model by design…and it works. *Nursing Management*.

h. Ritter-Teitel, J. (2002). The Impact of Restructuring on Professional Nursing Practice. *Journal of Nursing Administration* (32).

i. Stanley, J.M., Hoiting, T., Burton, D., Harris, J., & Norman, L. (2007). *Implementing innovation through education-practice partnerships*. Nursing Outlook, 55, 67-73.

j. Tornabeni, Jolene (2006). Clinical Nurse Leader Evolution of a Revolution. *Journal of Nursing Administration* (36),1, pp 3-6.

k. Tornabeni, J., Stanhope, M., & Wiggins, M. (2006). The CNL Vision. *Journal of Nursing Administration*, 36, 3, 103-108.

4. Presentations

a. Stanley, J., & Tornabeni, J. (2004). Changing the Face of Nursing: Education and Practice Partnership Model.
b. Tornabeni, J. (2006). Update on the Clinical Nurse Leader

Previous, Stage I

Next, Stage III

Stage III. Developing a Vision and Strategy

A. Creating and articulating a common vision to help direct the change effort.

B. Developing strategies for achieving that vision.

C. Avoiding the status quo

D. Suggested References

1. Articles

a. Anderson, R., & McDaniel, R. (2000). Managing Health Care Organizations: Where Professionalism Meets Complexity Science. *Health Care Management Review*, 25 (1), 83 - 92.

b. Bartels, J., & Bednash, G. (2005). Answering the call for quality nursing care and patient safety: A new model for nursing education. *Nursing Administration Quarterly*, 29 (1) 5 - 13.

c. Begun, J., & White, K. (1999). The Profession of Nursing as a Complex Adaptive System: Strategies for Change. *Research in Sociology of Health Care*. (16), 189 - 203.

d. Formella, N. & Rovin, S. (2004). Creating a desirable future for nursing, Part 2: The issues. *Journal of Nursing Administration*, 34(6), 264-267.

e. Formella, N. & Rovin, S. (2004). Creating a desirable future for nursing, Part 3: Moving forward. *Journal of Nursing Administration*, 34(7/8), 313-317.

f. Haase-Herrick, K.S. & Herrin, D.M. (2007). The American Organization for Nurse Executives' guiding principles and American Association of Colleges of Nursing's clinical nurse leader. *Journal of Nursing Administration*, 37(2), 55-60.

g. Long, K.A. (2004). Preparing nurses for the 21st century: Re-envisioning nursing education and practice. *Journal of Professional Nursing*, 20 (2), 82-88.

h. Miller, P. (2008). Clinical nurse leader—a new nursing role. *The Tennessee Nurse*, *71*(2), 4.

i. Murphy, E.C., Ruch, S., Pepicello, J. & Murphy, M. (1997). Managing an Increasingly Complex System. *Nursing Management*, (10), 33-38.

j. Plexus Institute - *New to Complexity*
This is a set of resources for "newcomers to complexity" found on the Plexus Institute website. It includes a complexity science primer, recommended resources, "complexity aides" stories, and leadership principles.

k. Rovin, S. & Formella, N. (2004). Creating a desirable future for nursing, Part 1: The nursing shortage is a lack of creative and systemic thinking. *Journal of Nursing Administration*, 34(4), 163-166.

l. Tornabeni, J., & Miller, J.F. (2008). The power of partnership to shape the future of nursing: the evolution of the clinical nurse leader. *Journal of Nursing Management, (16)*, 608-613.

m. Tornabeni, J., Stanhope, M., and Wiggins, M. (2006). The CNL vision. *Journal of Nursing Administration*, 36(3), 103-108.

n. Zimmerman, B., Lindberg, C., & Plsek, P. Edgeware: Lessons from Complexity Science for Health Care Leaders. Dallas, TX: VHA, Inc., 1998/2001.
This is an introductory handbook for healthcare professionals. It covers key concepts, learning resources, case stories and application principles.

2. Presentations

   a. Begun, J. (2005). Searching for Nursing's Futures

   b. Bower, K. (2006). Designing a Care Delivery Model: The What, The How, The CNL
      - Attachment 1: Nursing Care Delivery Model Survey
      - Attachment 2: Care Management Inventory

   c. Haase-Herrick, K. (2006). Comparing AONE & AACN's Initiatives
      - Attachment: AONE Guiding Principles Compared to the CNL

3. AACN National and Regional meetings

   a. 2005 Regional Meeting Presentations

4. Curriculum/preceptor workshop, co-sponsored with the Plexus Institute, Kansas City:

   - Agenda

   - Presentations

Previous, Stage II Next, Stage IV

Stage IV. Communicating the Change Vision

A. Using every vehicle possible to constantly communicate the new vision and strategies

B. Having the guiding coalition role model the behavior expected of others

C. Emphasizing the expected positive outcomes

D. Forming practice agency task force to analyze/recommend system changes

E. Suggested References

1. AACN Web site

2. AONE Joins Clinical Nurse Leader Implementation Task Force

3. Journal Articles

a. Haase-Herrick, K. (2005). The opportunities of stewardship. *Nursing Administration Quarterly*, 29, 115-118.

b. Harris, J. & Roussel, L. (2009). Initiating and sustaining the clinical nurse leader role: a practical guide. Boston: Jones and Bartlett.

c. Maag, M.M., Buccheri, R., Capella, E. & Jennings, D. (2006). A conceptual framework for a clinical nurse leader program. *Journal of Professional Nursing*, 22(6), 367-372.

d. Seed, M.S., Torkelson, D.J., & Karshmer, J.F. (2009). The clinical nurse leader: helping psychiatric mental health nurses transform their practice. *Journal of American Psychiatric Nurses Association, 15(2)*, 120-125.

e. Sherman, R.O. (2008). Factors influencing organizational participation in the Clinical Nurse Leader project. *Nursing Economic$, 26*(4), 236-241.

f. Smith, S.L., Manfredi, T., Hagos, O., Drummond-Huth, B., Moore, P. (2006) Application of the Clinical Nurse Leader Role in an Acute Care Delivery Model. *Journal of Nursing Administration*, 36(1), 29-33.

g. Stanhope, M. & Turner, L.P. (2006). Diffusion of the clinical nurse leader innovation. *Journal of Nursing Administration*, 36(9), 385-389.

h. Wiggins, M. (2008). The partnership care delivery model: an examination of the core concept and the need for a new model of care. *Journal of Nursing Management (16)*, 629-638.

i. Wiggins, M.S. (2006). The Partnership Care Delivery Model. *Journal of Nursing Administration*, 36(7/8), 341-345.

4. Clinical Nurse Leader DVD (Department of Veteran's Affairs), a 15 minute video about the implementation of the CNL in the Veteran's Affairs Health Care System

5. AACN FAQ sheets

6. Drenkard, K. (2004). Clinical Nurse Leader Pilot: Critical Success Factors

Previous, Stage III

Next, Stage V

Stage V. Empowering Broad-Based Action

A. Getting rid of obstacles

B. Changing systems or structures that undermine the change vision

C. Encouraging risk taking and nontraditional ideas, activities, and actions

D. Suggested References

1. CNL/CNS Comparison Paper (2004)
2. Job Description: one example of an acute care job description from Maine Medical Center
3. Performance Evaluation Tool for the Practice Setting: Cross-Setting expectations for the CNL Graduate (How Will You Know One When You See One)
4. CNL End of Program Competencies & Required Clinical Experiences
5. CNL End of Program Competencies Checklist
6. Working Statement Comparing the Clinical Nurse Leader and Nurse Manager Roles: Similarities, Differences and Complementarities (2005)
7. Preceptor Role Guidelines
8. Curriculum development framework
9. "Template for CNL Implementation in the Practice Setting" (Jolene Tornabeni & Gail Wolfe)
10. Examples from the practice arena
11. AACN Clinical Nurse Leader Pilot Project Evaluation Indicators
12. Comparison document: AONE Guiding Principles compared to AACN Core Competencies
13. Articles

a. Dzurec, L.C., Allchin, L., Engler. A.J., Szarlan, J., Polifroni, E.C. & Brewer, T. (2006). Toward a qualified yes: Personal characteristics of post-baccalaureate nursing students and implementation of the clinical nurse leader role. *Journal of Professional Nursing*, 22(1), 15-22.

b. Nelson, E.C., Batalden, P.B., Huber, T.P., Mohr, J.J., Godfrey, M.M., Headrick, L.A., & Wasson, J.H. (2002). Microsystems in Health Care: Part 1. Learning from high-performing front-line clinical units. *Journal on Quality Improvement*, 28, 472-493.

c. Nelson, E.C., Batalden, P.B., Homa, K., Godfrey, M.M., Campbell, C., Headrick, L.A., Huber, T.P., Mohr, J.J., & Wasson, J.H. (2003). Microsystems in health care: Part 2. Creating a rich information environment. *Joint Commission Journal on Quality and Safety*, 29(1), 5-15.

d. Stanhope, M., Pedersen Turner, L. (2006). Diffusion of the Clinical Nurse Leader Innovation. *Journal of Nursing Administration*, 36(1), 385-389.

e. Stanton, M. (2006, Spring). The health care quality challenge and the clinical nurse leader role (CNL). *Online Journal of Rural Nursing and Health Care*, 6(1).

f. Tachibana, C. & Nelson-Peterson, D.L. (2007). Implementing the clinical nurse leader role using the Virginia mason production system. *Journal of Nursing Administration. 37*, 477-9.

14. Presentations

a. Fletcher, K.A., **Mission: Designing a CNL Master's Curriculum**. Presented at Clinical Nurse Leader Faculty Development Workshop, University of Kansas School of Nursing, Kansas City, KS, August 9, 2005.

b. Wiggins, M. (2006). How the CNL Role Facilitates Other Healthcare Quality Initiatives
   - Attachment: Best Practices

Previous, Stage IV Next, Stage VI

Stage VI. Generating Short-Term Wins

A. Planning for visible improvements in performance, or "wins"

B. Enabling wins to take place

C. Visibly recognizing and rewarding people who made the wins possible

D. Dealing with the troublesome

E. Suggested References

1. Articles

a. Berwick, D.M. (1991). Controlling variation in health care: A consultation from Walter Shewhart. *Medical Care 29*, 1212-1225.

b. Bowcutt, M. & Goolsby, M.J. (2006). Promoting patient-centered outcomes. *Nursing Administration Quarterly*, 30(2), 156-161.

c. Drenkard, K. & Cohen, E. (2004). Clinical nurse leaders: Moving toward the future. *Journal of Nursing Administration*, 34, (6) 257-260.

d. Godfrey, M.M., Nelson, E.C., Wasson, J.H., Mohr, J.J., & Batalden, P.B. (2003). Microsystems in health care: Part 3. Planning patient-centered services. *Joint Commission Journal on Quality and Safety*. 29(4) 159-170.

e. Harris, J.L., Tornabeni, J. & Walters, S.E. (2006). A valued member of the healthcare team. *Journal of Nursing Administration*, 36(10), 446-449.

f. Poulin-Tabor, D., Quirk, R.L., Wilson, L., Orff, S., Gallant, P., Swan, N., & Manchester, N. (2008). Pioneering a new role: the beginning, current practice and future of the clinical nurse leader. *Journal of Nursing Management, 16*(5), 623-628.

g. Smith, D.S. & Dabbs, M.T. (2007). Transforming the care delivery model in preparation for the clinical nurse leader. *Journal of Nursing Administration*, 37(4), 157-160.

2. Presentations

    a. Joan Clark, Rose Sherman, Janet Malone, Flor Aguirre, **Developing the Clinical Nurse Leader Role in the 12 Bed Hospital Model**. CNL Network Teleconference, March 15, 2006.

    b. Combination Presentation: Drenkard, K. **Role Clarity: CNS/CNL Inova Health System** / Spross, J. and Stanley, J. **Working Statement Comparing CNLsm and CNS Roles: Similarities, Differences & Complementarities** (2004/2005)

3. AACN Clinical Nurse Leader Pilot Project Evaluation Indicators

4. The Clinical Nurse Leader Role: A Pilot Evaluation by an Early Adopter

5. CNL Unit Assessments: Examples from the University of South Florida College of Nursing

    a. Daily Unit Assessment

    b. Monthly Unit Assessment

Previous, Stage V

Next, Stage VII

Stage VII. Consolidating Gains and Producing More Change

A. Using increased credibility to change all systems, structures, and policies that do not fit together and do not fit the transformation vision.

B. Hiring, promoting, and developing people who can implement the change vision.

C. Reinvigorating the process with new projects, themes, and change agents.

D. Suggested References

1. Articles

a. Batalden, P.B., Nelson, E.C., Mohr, J.J., Godfrey, M.M., Huber, T.P., Kosnik, L., & Ashling, K. (2003). Microsystems in health care: Part 5. How leaders are leading. *Joint Commission Journal on Quality and Safety*, 29(6), 297-308.

b. Hix, C., McKeon, L., & Walters, S. (2009). Clinical nurse leader impact on clinical microsystems outcomes. *Journal of Nursing Administration, 39*(2), 71-76.

c. Huber, T.P, Godfrey, M.M., Nelson, E.C., Mohr, J.J., Campbell, C., & Batalden, P.B. (2003). Microsystems in health care: Part 8. Developing people and improving work life: What front-line staff told us. *Joint Commission Journal on Quality and Safety*, 29(10), 512-522.

d. Smith, S.L., Manfredi, T., Hagos, O., Drummond-Huth, B. & Moore, P.D. (2006). Application of the clinical nurse leader role in an acute care delivery model. *Journal of Nursing Administration*, 36(1), 29-33.

e. Stanley, J.M., Gannon, J., Gabuat, J., Hartranft, S., Adams, N., Mayes, C., Shouse, G.M., Edwards, B.A., & Burch, D. (2008). The clinical nurse leader: a catalyst for improving quality and patient safety. *Journal of Nursing Management*, *16*(5), 614-622.

f. Thompson, P. & Lulham, K. (2007). Clinical nurse leader and clinical nurse specialist role delineating in the acute care setting. *Journal of Nursing Administration. 37*, 429-31.

g. Wasson, J.H., Godfrey, M.M., Nelson, E.C., Mohr, J.J., & Batalden, P.B. (2003). Microsystems in health care: Part 4. Planning patient-centered care. *Joint Commission Journal on Quality and Safety*, 29(5), 227-237.

2. Presentations

    a. Drenkard, K (2003). **Role of the Team Coordinator: INOVA Health System**

    b. Clarke, S. (2006). Evaluation Framework & Student/Graduate Database

    c. Harris, J. (2006). AACN & VA Pilot Study and Next Steps

3. Resource Material

    a. Preceptor Role Guidelines

    b. Evaluation Framework and Cover Letter

Previous, Stage VI

Next, Stage VIII

Stage VIII. Anchoring New Approaches in the Culture

A. Creating better performance through customer- and productivity-oriented behaviors, more and better leadership, and more effective management.

B. Articulating the connections between new behaviors and organizational success.

C. Developing means to ensure leadership development and succession.

D. Suggested References

1. Articles
    a. Batalden, P.B., Nelson, E.C., Edwards, W.H., Godfrey, M.M., & Mohr, J.J. (2003). Microsystems in health care: Part 9. Developing small clinical units to attain peak performance. *Joint Commission Journal on Quality and Safety*. 29(11), 575-585.

    b. Hartranft, S.R., Garcia, T. & Adams, N. (2007). Realizing the anticipated effects of the clinical nurse leader. *Journal of Nursing Administration.*

    c. Kosnik, L. K., & Espinosa, J.A. (2003). Microsystems in health care: Part 7. The microsystem as a platform for merging strategic planning and operations.

    d. Mohr, J.J., Barach, P., Cravero, J.P., Blike, G.T., Godfrey, M.M., Batalden, P.B., Nelson, E.C. (2003). Microsystems in health care: Part 6. Designing patient safety into the microsystem. *Joint Commission Journal on Quality and Safety*, 29(8), 401-408.

2. Certification of CNLs

3. CCNE Accreditation of CNL programs - In process

4. Master's Essentials

Previous, Stage VII