



The Nursing Professional Portfolio

A Pathway to Career Development

Myrtle Williams, MSN, RN, BC, CNAA, BC

Kathryn Jordan, MSN, MPH, RN, BC

Nursing professional portfolios have moved beyond the traditional listing of past experiences and accomplishments. They now provide a format for self-reflection on practice and for goal planning, capturing both the art and the science of nursing. This article describes the experiences of designing and implementing the use of a comprehensive professional portfolio and the benefits realized by individual staff nurses and their managers.

Portfolios are no longer solely the domain of artists, architects, photographers, and models. They are considered an essential tool in demonstrating professional accomplishments and documenting professional growth for a variety of professions. The American Dietetic Association instituted the Professional Development 2001 Portfolio, a certification process for registered dietitians and dietitian technicians to strengthen professional development and life-long learning (Pertel, 1999). Teachers are also being encouraged to create a portfolio that documents their learning processes related to a set of standards (Painter, 2000).

The value of a nursing professional portfolio has been documented for several years (Bell, 2001; Jackson, 2004; Oermann, 2002; Meister, Heath, Andrews, & Tingen, 2002; Serembus, 2000). In 1996, the National Council of State Boards of Nursing (NCSBN) developed a position paper that recommended both the regular evaluation of professional development needs and the use of a professional portfolio to organize and evaluate professional development (NCSBN, 1996). As a means of documenting professional competence, the NCSBN recommends the professional development portfolio. Both Kentucky

and Ohio Boards of Nursing are considering plans to require professional nursing portfolio for relicensure (Meister et al., 2002).

A recent conversation with a colleague revealed that her first-grade daughter being considered for a gifted program was required to submit a portfolio that consisted of examples of her artistic abilities. In addition to recommendations from teachers, which remained the primary criteria, actual samples of her writing and drawing were required to demonstrate clear examples of her ability and talent. It appears that portfolios can be useful in a variety of levels and settings and are growing in popularity as a method of demonstrating abilities and accomplishments.

The professional nursing portfolio continues to gain momentum as a method to capture competency validation. The Texas Children's Hospital portfolio model includes a self-assessment step that enables the nurse to determine areas of personal strengths and opportunities for growth. The tool is designed to provide suggested strategies to improve knowledge and skills in a particular competency by creating a development plan. Consequently, the value of a portfolio lies in its ability to provide both a historical record and, perhaps more importantly, a pathway for future growth and development.

It is important to consider that the portfolio is more than an accumulation of documents and artifacts. A vibrant part of the portfolio is the continuous self-assessment of competencies and the establishment

Myrtle Williams, MSN, RN, BC, CNAA, BC, is Vice President of Clinical Services at Texas Children's Hospital, Houston, Texas.

Kathryn Jordan, MSN, MPH, RN, BC, is a Clinical Training and Development Specialist at Texas Children's Hospital, Houston, Texas.

of goals. As each nurse reflects upon individual practice needs, goals are set and plans are made to meet these goals. The portfolio provides the means by which assessment, planning, and evaluation can be easily addressed.

A desire to encourage professional development activities by staff nurses led to the investigation of methods that would assist in bridging the gap between their current practice and ever-evolving practice changes and in preparing for the roles and responsibilities that they envision for their future. The Texas Children's Hospital nursing leadership team determined that the nursing professional portfolio would be one such tool to bridge this gap.

IDEA FOR USE OF A PORTFOLIO

Review of American Nurses Association's (ANA) Standards and Scope of Practice for Professional Nursing Development by the centralized nurse education team at Texas Children's Hospital resulted in the concept of a portfolio to enhance the professional development of the nursing staff (ANA, 2000). One of the ANA practice standards for evaluation states: "The effectiveness of the learning activity is evaluated in relation to the learner's achievement of the educational objectives and the development of the individual nurse's portfolio, which includes documentation of ongoing professional development, career planning and continuing professional nursing development." Use of a portfolio was appealing to the education team because it was seen as a tool to help provide a structure for identifying the strengths and learning needs of nursing staff.

The decision to develop and require all registered nurses at Texas Children's Hospital to adopt use of a nursing professional portfolio was an easy and quick one. In 2001, the hospital embarked on a \$345,000,000 expansion (457,000 square feet) that required the addition of over 300 pediatric nurses. Many of the nurses recruited to staff the new acute care facility were novice nurses (Benner, 1984). The ongoing development of all members of the nursing team was identified by the Chief Nursing Officer (CNO) as a long-term priority of the nursing department. The CNO and the nursing directors viewed the use of a portfolio as a vehicle to assist in fostering the professional development of nurses, and they were very supportive of its use. Additionally, the portfolio was in direct support of the department's philosophy of nursing, which states:

- Nurses must be nurtured from novice to expert.
- The environment in which nurses practice must support and foster accountability, professional growth, and career satisfaction.

- A family-centered, age-specific, safety conscious, interdisciplinary, collaborative approach that results in patient and nurse synergy provides the foundation for quality nursing care.
- Advanced education is essential to the advancement of nursing.
- Nurses are encouraged to participate in nursing research and to incorporate findings into practice.

In addition to the traditional methods used to advance the knowledge and skill level of each nurse, senior nurse leaders decided that the portfolio would also be used to facilitate their ongoing learning and career progression. Further, a portfolio would be designed to help enhance the ongoing development not only of novice nurses but also of more seasoned nurses.

BENEFITS TO NURSE

The value of the nursing professional portfolio to the staff nurse is twofold. It provides structure and direction. Structurally, the portfolio offers a mechanism to track both formal competency validation and continuing education activities, and the less formal acknowledgments that exhibit the art of nursing. When a patient or family member sends a personal thank you note, or when a supervisor or committee chair sends a note of appreciation, most nurses read and discard, or save the note in their locker for a short time before discarding it. The portfolio provides a place to maintain an active reference file that provides examples of how nurses meet the complex needs of families and the demands of professional practice.

The portfolio is designed to stimulate the staff nurse to reflect on successful interventions and capture them in an exemplar. Meeting the physical, psychological, cultural, and religious needs of a patient provides an ongoing challenge for nurses. The portfolio is an excellent tool to capture examples of successful interventions (Figure 1). Once written down for the portfolio, it is a small step to a journal for publication, thus sharing these practices with other professionals.

Continuing nursing education certificates are frequently found at the bottom of a drawer or in a folder that requires frantic searching to update a resume or respond to an audit by the Board of Nurse Examiners. The portfolio can house these documents and keep track of programs attended that met development goals but did not offer CNE credits. Listing of awards, committee assignments, and professional organizations and depth of involvement in them may also be maintained in the portfolio.

Precepting and mentoring of new nurses is an accepted role of experienced nurses, but they rarely keep track of who and when they precepted or

mentored. Nor do they always record all of the projects or short-term activities in which they have been engaged. Community activities and committee work may not have been viewed as relevant enough for inclusion. The portfolio provides a place to record these activities and programs that establish a degree of commitment to the organization and to professional development.

The portfolio design provides some standard forms for maintaining records of activities such as certifications, honors/awards, and committee participation (Figure 1). The creative and innovative aspects of nursing are often overlooked, and the development of

new tools to enhance safe practice often goes unnoticed. By providing an area to capture this, such as a page for exemplars and notes of appreciation, nurses may begin to realize their creative potential (Figure 2). For nurses just beginning their professional careers, this section of the portfolio may stimulate idea development that otherwise might not have been considered.

The portfolio also provides the vehicle for assessing career direction and in designing a path to achieve a goal. A key feature of the portfolio that illustrates this is the development pathway and the subsequent development plan. As nurses assess their strengths and

| | | | | |
|-----------------------------------------------------------------------------------------------------|-------------------------------------------------------------|------------------------------------------------|------------------------------|-----------------------------------------------------|
| Professional Certifications | | | | Professional Certification/Awards/Committees |
| List certifications achieved through a professional nursing organization | | | | |
| Date | CURRENT YEAR | Certification | Expiration Date | |
| | | | | |
| Date | PREVIOUS | Certification | Expiration Date | |
| | | | | |
| Special Recognitions, Honors and Awards (Include copies of certificates or letters received) | | | | |
| Date | CURRENT YEAR Special Recognitions, Honors and Awards | | Given By | |
| | | | | |
| Date | PREVIOUS | Special Recognitions, Honors and Awards | Given By | |
| | | | | |
| Committee participation at Texas Children's | | | | |
| In-House Committee Participation | | | | |
| Date | CURRENT | Year Committee | Committee Chair | Meeting Hours |
| 2004–present | Unit Practice Council | | Dilcia Courtney, RN | 24 hours/year changed to 12 hours/year |
| 2004–present | Morale Committee - Historian | | Tammy Taylor, RN | 4 hours/year |
| 2004–present | Clinical Practice Council | | Jennifer Sanders, RN | 36 hours/year |
| Date | PREVIOUS | Committee | Committee Chair | Meeting Hours |
| 2005 | Evidence Based Practice Scholars | | Marilyn Hockenberry, PhD, RN | 24 hours |
| 2005 | Interfaith Advisory Council | | Pam Taylor, M Div. | 8 hours |
| 2005 | Magnet Quality of Care | | Terri Brown, MSN, RN | 2 hours |
| 2004-2005 | Co-Chair Unit Practice Council | | Jennifer Maddox, RN | 12 hours |

FIGURE 1 Sample page from the nursing professional portfolio of Dilcia Courtney, RN, Pulmonary/Adolescent Unit, Texas Children's Hospital.

growth opportunities, they formulate short- and long-term goals. A nurse may have only a vague sense of career direction, but the pathway suggests incremental steps toward professional advancement. Joining professional organizations or becoming active on organizational committees becomes more attainable when included in a personal development plan. This aspect of the portfolio elevates the process from merely maintaining a historical record to planning for the future in an organized, intentional manner.

The following timetable was developed to guide the 3-year implementation of the nursing professional portfolio at Texas Children's Hospital (Table 1).

DESIGNING THE PORTFOLIO

As previously noted, a review of the literature revealed very little evidence regarding the use of portfolios to enhance the professional development of nurses in an acute care hospital. There were examples of portfolios used by other professionals and by nursing students, but those examples failed to offer a practical solution for integration of the tool into the work life of a registered nurse in an acute care hospital setting. Ease of access and ease of use are keys to the success of the portfolio.

A small work team of educators was asked to focus on the development and implementation of a portfolio.

EXEMPLAR

An **exemplar** is a written document that illustrates specific behaviors used to facilitate the achievement of outcomes.

Include exemplars that demonstrate your expertise in 2 areas of practice where you rated your performance at a 4 or a 5 on page 3.

Caring: Family Centered Care

I had the opportunity to work directly with a community hospital and other key members on the Texas Children's Hospital committee to develop and implement the concept of Newborn Virtual Visitation. The service, *Family Vision*, allows a parent/guardian the opportunity to visit their infant from a remote location (the community hospital) after the infant has been transferred to the Texas Children's Newborn Center. This service is an excellent opportunity to provide personal attention, facilitate bonding, and calm fears of the parents whose baby has been transferred to our facility. If the parents request, they will have the opportunity to visit for a period of time each day while their baby resides with us. It is also an opportunity for siblings to visit via video conferencing technology. This feature is a way to incorporate the new baby into the family from the beginning, when siblings may not be able to visit the actual Neonatal Intensive Care Unit. The benefits of this program allow for families to view their baby within a very quick timeframe while mom is still recovering. In the event of a loss, or a rapidly declining infant, it allows families time to bond and see their baby when they might not have had the opportunity to do so otherwise. In partnership with the nurse manager from NICU 3, I created the operational process by which this concept was implemented in our units--from concept to "go live." A step-by-step plan was developed to operationalize the process and install the necessary equipment in our respective areas. I came up with the plan for how my unit would carry out the task of connecting with the partner site. A reference material was created that could be followed by the nurse (process for inpatient and discharged visits, nurses script, checklist, gave input for the creation of the evaluations) and a site visit to the other hospital was made to the partner hospital. I worked with Information Systems to create an outlook calendar for both units so the scheduling information could be stored electronically and viewed by all. For my unit, I championed the process to train the nursing staff to participate in the visits with families and trained charge nurses on how to intake the information and schedule with the community hospital. My partner and I arranged and held practice visits with the other hospital as well as practiced with our staff. I recently trained 88 NICU 2 nurses on how to schedule and perform a "visit." I have also worked with Child Life in creating a "prep book" to be used with families and siblings at partner hospitals to prepare them for what they will see during the initial visit.

THANK YOU LETTERS

Include any thank you letters you have received from patients, parents, co-workers, physicians, and leadership/management team members, etc., which help demonstrate your level of expertise.

Exemplars/Thank You Letters

FIGURE 2 Sample page from the nursing professional portfolios of Adrian McKinney, RN, NICU II, and Liz Bolds, RN, NICU II, Texas Children's Hospital.

TABLE 1 Portfolio Project Timeline

| What | When |
|---------------------------------------------------------------------------------------------|------|
| Gain agreement for the use of the portfolio | 2002 |
| Design portfolio template | 2002 |
| Solicit feedback from key stakeholders | 2002 |
| Introduce into application process for clinical ladder | 2002 |
| Pilot test use of portfolio | 2002 |
| Refine template | 2003 |
| Create and communicate portfolio implementation plan | 2003 |
| Provide portfolio training | 2004 |
| Encourage and coach nurse managers and individual staff nurses to plan for use of portfolio | 2004 |
| Implement housewide use of portfolio | 2004 |

The team identified seven purposes of the portfolio: (1) establish career goals, (2) showcase professional accomplishments, (3) illustrate specific areas of expertise, (4) enhance knowledge and skills, (5) plan for additional career opportunities, (6) help gain admission to school in order to advance academic preparation, and (7) apply to participate in the hospital's clinical ladder program.

Once the purposes were identified, the next step was to design a basic format for the portfolio that would help nurses achieve the stated purposes. Three guiding principles were created to help provide focus to the design process. The design guiding principles stated that the portfolio must: (1) be easy to use and update, (2) challenge nurses to move outside their comfort zone, and (3) be flexible enough for electronic or paper use.

One team member then developed a draft of a portfolio template. After a period of refinement by the team, the draft template was ready for introduction to key nursing stakeholders. Nurse leaders felt that the template met the designated purposes and were particularly excited about its use in the application process for our clinical ladder. Although staff nurses found the template easy to use, the development pathway overwhelmed them. The development pathway outlined ongoing growth opportunities that nurses should consider at various stages of their nursing career. Incumbent nurses seemed particularly intimidated. Many felt unsuccessful because they had not taken advantage of opportunities outlined on the pathway. The pathway was revised and the directions for use were altered to indicate that the pathway was intended to provide ideas for growth opportunities.

Due to its comprehensive design, the portfolio requires some time to complete. In an effort to assist staff nurses in completing the portfolio, the unit leadership teams attended a 1-hour training session. These training sessions detailed information about the use of the portfolio and strategies on how to foster staff nurse buy-in. The leadership teams then facilitated use of the portfolio on their units. The feedback, reinforcement, and support of the leadership teams were instrumental in the success of the development and implementation of the nursing professional portfolio.

Each nurse is required to submit a portfolio prior to the annual performance appraisal. The comprehensive picture of the nurse that is exhibited in the portfolio assists in the selection of committee appointments, sabbatical recipients, and candidates for leadership positions.

RESULTS AND NEXT STEPS

Before our hospital's quest for Magnet designation in 2002, the portfolio was introduced as a component of the clinical ladder application process for registered nurses. One of our best practices identified by Magnet site visit appraisers was the clinical ladder program. We believe that the enhanced focus on professional accountability, which is driven by the portfolio, helped to demonstrate added strength for the professional development force of magnetism.

In May of 2005, all registered nurses in the inpatient and perioperative services at Texas Children's Hospital began using the portfolio as a part of their performance management process. Initial feedback indicated that filling out the portfolio was overwhelming for many nurses but most of them could recognize the long-term benefits of a portfolio.

Feedback from the nurse managers indicated that the portfolio also served as a valuable tool to assist them in identifying and recognizing nurses who participate in various professional activities, of which they may not have been aware in the past. Nurses participate in many activities, such as community service projects and professional organization committee work, during nonworking hours and do not always share this information with their managers. The portfolio highlights this information for nurse managers. Also, being able to identify the involvement of nurses in various professional initiatives is a critical element of a successful Magnet journey.

Next steps are being planned to continue advancing the use of the portfolio. One step is short-term and involves the development of formal indicators to measure ongoing outcomes associated with professional development of our nurses. Indicators will focus on staff nurse and manager satisfaction with use of the

portfolio and the number of staff engaging in traditional growth and development activities as well as non-traditional growth and development activities such as grant awardees, adjunct faculty positions, inventions, and patents (Figure 3).

When originally implemented, only a paper version of the portfolio could be offered. The portfolio could be accessed electronically and stored on a disk, but any supporting materials such as thank you letters and certificates had to be stored in a binder. An electronic version with the ability to scan documents into the portfolio is in the exploration stage.

Benefits that nurses have realized include the ability to logically depict professional experiences and the ability to easily create a career progression plan. It allows nurses to stretch and reach beyond their day-to-day expectations and explore ways to advance both themselves and the profession. Along the way, the nurse accepts accountability for his or her growth and development.

The organization gains from the innovation and creativity of the nurses, and as they become more involved in the profession, nursing continues to advance. Few nurses begin their career with specific

| Inventions (List name of invention and describe its use) | | |
|-----------------------------------------------------------------|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date | CURRENT YEAR | Name and Description |
| | | |
| Date | PREVIOUS | Name and Description |
| November 2003 | Rena Dee® | <p>Rena Dee is no ordinary girl. In fact, she is a 16-inch muslin doll who on her first tour traveled to more than 10 different pediatric dialysis/transplant units, including hospitals in England, Virginia, New York, Indiana, California, Missouri, and Texas. She has now visited four continents. Today she has served not only as an ambassador for children with end-stage renal disease (ESRD) but also spurred Hope™, a sister ambassador doll for children facing HIV/AIDS.</p> <p>Rena Dee was created in response to pediatric nephrology nurses supplications for a unique support group approach for ESRD patients. Some programs were so small that a school-age child may never meet a <i>like</i> child facing the same disease. And so Rena Dee was born, with the children painting her body and drawing on her face and hair. She provides an opportunity for children on dialysis to share secrets, tips, and strategies to cope with ESRD. Each host hospital stamps her passport and offers their patients the chance to add their own personal touch to the diary.</p> <p>Rena Dee represents wellness and preventive rehabilitation. She teaches kids that it is important to keep in touch with friends. She shows that it is okay to be different, for this doll has all green features. We couldn't have planned it better, but children had that insight.</p> <p>In October, Rena Dee accompanied a NASA mission specialist, his son a liver transplant recipient, on the space shuttle Atlantis's mission to the international space station.</p> |

| Patents (List name of patent and describe its use) | | |
|-----------------------------------------------------------|---------------------|-----------------------------|
| Date | CURRENT YEAR | Name and Description |
| | | |
| Date | PREVIOUS | Name and Description |
| | | |

Inventions/Patents

FIGURE 3 Sample page from the nursing professional portfolio of Helen Currier, RN, Renal Dialysis/Pheresis, Texas Children's Hospital.

career goals in mind, but a tool such as the portfolio provides a formal pathway for ongoing professional and personal growth.

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ADDRESS FOR REPRINTS: Myrtle Williams, MSN, RN, BC, CNAA, BC, Texas Children's Hospital, 6621 Fannin Street, MC1-4461 Houston, TX 77030 (e-mail: mlwillia@texaschildrenshospital.org).