School Nurse Performance Evaluation

These guidelines contain current best practice recommendations for the health service topic addressed. The guidelines have been reviewed by the School Nurse Practice Subcommittee of the Michigan Statewide School Nurse Task Force as a means to provide consistent and safe care to students. Specific laws and regulations that direct school nursing practice or other health services are identified in the guidelines. There is no guarantee that the use of guidance in this document will lead to any particular result or outcome. The information in this document was researched in July, 2016.

Purpose

This document will provide guidelines and resources for school nurse performance evaluation.

Overview

Hootman (2013) defined performance evaluation as a communication tool as well as a quality management tool because the review gives direction, facilitates agreement on expected contributions, identifies educational needs, and can gather ideas for change. Somerville (2012) identified the primary purpose of performance evaluation is to demonstrate to the organization that employees meet job standards. McDaniel, Overman, Guttu, & Engleke (2013) indicated the main goals of a school nurse performance evaluation were to ensure competency and promote professionalism in practice. Resha (2009) proposed that an evaluation system serves to document an individual's performance meets standards and competencies as well as developing a plan for improvement and assisting the supervisor to guide professional development opportunities. Professional standards provide the framework and direction for school nurses to evaluate their work (Beirne, 2009; Haffke, Damm, & Cross, 2014; Hootman, 2013; McDaniel et al., 2013; NASN, 2013; Procter, 1986; Somerville, 2013; Resha, 2009). The literature provides examples of different appraisal systems or frameworks (Connecticut Department of Education, 2014; Haffke et al., 2014; Hootman, 2013; McDaniel et al., 2013) for school nurse evaluation.

In Michigan, standard recommendations for school nurse performance evaluations are complicated by varying school population sizes and characteristics, employer variances, employee contracts, staffing patterns, and community-level engagement and resources. The literature does provide some key concepts to be considered for a school nurse performance evaluation that can provide guidance for a school district.

- Assessment of employee performance should take place routinely from every six months to every two years (Hootman, 2013).
- Job descriptions should reflect the duties of the school nurse in the school setting. Job descriptions based upon the standards of school nursing practice is the first step to ensuring standards are expected and met (Hootman, 2013; McDaniel, et al., 2013; NASN, 2013).
- School nurses should be evaluated using competencies, standards, performance indicators, and other type of outcome or quality criteria (Hootman, 2013).
- Competencies, job descriptions, standards, and daily work are related in a performance evaluation (McDaniel et al., 2013). Competence assessment evaluates whether an individual has the knowledge, education, skills, experience, and proficiency to perform assigned
responsibilities and a performance evaluation assesses how well persons actually perform their responsibilities (Hootman, 2013).

- School nurses should be clinically supervised and evaluated by a registered nurse knowledgeable of the scope and standards of practice for school nursing (Beirne, 2009; NASN, 2013; Hootman, 2013; Proctor, 1986; Somerville, 2013; Resha, 2009).
- School administrators should have input into other aspects of the school nurse’s evaluation, for example, teamwork, cooperation, collaboration, classroom teaching, productivity, communication skills, attendance (Constante, 2001; Hootman, 2013).
- Following the evaluation, a jointly developed improvement plan should be developed to assist the employee to overcome obstacles or limitations identified and strengths should be recognized or praised (Hootman, 2013).
- Data for the appraisal system should be collected from a variety of sources, such as, direct observation, interviews, personal and professional goals, samples of typical nursing documentation, work samples that reflect all components of the nursing process (e.g., nursing care plans, individualized health care plans), health office inspection, portfolio, audits, written reports, and electronic and phone communication (Hootman, 2013; McDaniel et al., 2013; Somerville, 2013).
- Self-evaluation is a beneficial component to performance evaluations as it encourages nurses to examine their own practice, take responsibility for their individual growth, and motivate them to strive for a higher level of performance (McDaniel, et al., 2013).

### School Nursing Performance Evaluation Components


<table>
<thead>
<tr>
<th>Component</th>
<th>Source</th>
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<tbody>
<tr>
<td>Established agency or school district policies and guidelines</td>
<td>Hootman (2013)</td>
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<tr>
<td>School district philosophy/mission</td>
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<tr>
<td>State laws governing nursing practice</td>
<td>Hootman (2013)</td>
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<tr>
<td>Employee job description</td>
<td>Hootman (2013)</td>
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<tr>
<td>Pre-established performance goals</td>
<td>Hootman (2013)</td>
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<tr>
<td>Program/functional objectives</td>
<td>Proctor (1986)</td>
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<tr>
<td>Evaluation criteria for each standard</td>
<td>Tustin et al., 2002</td>
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<tr>
<td>Professional development plan (goal setting document)</td>
<td>Tustin et al., 2002</td>
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<td>Observation conferencing document (observed behavior)</td>
<td>Tustin et al., 2002</td>
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<td>School administrator appraisal (feedback from principals or a second</td>
<td>Tustin et al., 2002</td>
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<td>building appraiser)</td>
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<tr>
<td>Intervention/improvement plan for nurse in need of assistance</td>
<td>Hootman, 2013; Tustin et al., 2002</td>
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<td>Scoring evaluation document</td>
<td>Tustin et al., 2002</td>
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Legal Framework for School Nurse Evaluation


Michigan Law

<table>
<thead>
<tr>
<th>Law</th>
<th>Brief Description</th>
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<tr>
<td>Administrative Rule R340.1163</td>
<td>Pertains to function of the school nurse. Assess and evaluate health status; interpret medical evaluations; plan course of action to minimize or prevent health problems; intermediary to family, physician, and social agencies; initiate supplemental testing; develop in-services and school policies.</td>
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<tr>
<td>Administrative Rule 340.1164 Competencies of school nurse.</td>
<td>Describes the competencies of a school nurse.</td>
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School Nurse’s Role

The National Association of School Nurses (NASN) (NASN, 2016) developed the Framework for the 21st Century School Nursing Practice to meet the evolving health needs of students. An increasing number of students with health needs, the number of students at risk for health concerns, and the increased complexity of their health needs were identified as changes impacting school nursing practice (NASN, 2016). These changes also impact the school nurse performance evaluation. The key principles of Care Coordination, Quality Improvement, Leadership, and Community/Public Health surrounded by the fifth principle, School Nursing: Scope and Standards of Practice (2011) can be used to develop program and performance objectives aligned with the national standards of practice. NASN (2016) recommended utilizing the framework to provide direction for annual performance appraisals and job descriptions. The Leadership principle includes advocacy, policy development and implementation, and systems-level leadership that identifies significant roles for school nurses developing or updating their performance evaluation system. Quality Improvement is the key principal that includes performance appraisal. The NASN position statements, Supervision and Evaluation of the School Nurse (2013) and Role of the School Nurse (2011) also provide guidance for school nursing performance evaluation.
**Recommendations for Practice**

**Leadership**

**Policy Development and Implementation**

- Ensure the school nurse job description is aligned with the *NASN School Nursing Scope and Standards of Practice* (2011) and consists of a list of the expected work and responsibilities, as well as the knowledge, skills, and abilities required of the person filling the position (Hootman, 2013). Michigan’s Administrative Rule R340.1163, *Functions of the School Nurse*, can also be used to develop job descriptions retrieved at [Administrative Rule R340.1163](http://w3.lara.state.mi.us/orr/Files/AdminCode/105_40_AdminCode.pdf).
- Understand the importance of clinical nursing supervision for school nurses.
  - Consider other areas for nursing supervision when district-level supervision is not available, such as regional supervision, peer or group supervision, and peer mentoring (Haffke et al., 2014; Resha, 2009).
  - Consider contracting with a school nurse supervisor in another school district for the nursing component of a performance evaluation (NASN, 2013).
  - School nurses without nurse administrators can take a leadership role in assisting their administration in developing a performance evaluation tool that includes a self-evaluation based on scope and standards of school nursing practice and non-nursing performance indicators (NASN, 2013).

**Quality Improvement**

**Performance Appraisal**

- Understand that performance appraisal is a professional responsibility and a standard of school nursing practice (Hootman, 2013). Standards hold school nurses to the highest quality of care and were developed to characterize, measure, and provide guidance in achieving excellence in care (McDaniel et al., 2013).
- Gather data (sample evidence or artifacts of work) throughout the school year to support work performance (McDaniel et al., 2013).
- Set annual performance goals (Haffke et al., 2014; McDaniel et al, 2013).
- Utilize a professional portfolio, especially in school districts without school nurse administrators (Beirne, 2009; Bradley, 2001; Hootman, 3013; NASN, 2013; Somerville, 2012; Tustin, 2002).
Components of a School Nurse Portfolio

Beirne (2009) described the evolving professional portfolio as a collection of evidence which demonstrates the continuing acquisition of skills, knowledge, attitudes and achievements. Beirne (2009), Tustin et al., (2002), and Bradley (2001) identified components of a school nurse portfolio that are described below:

- Academic credentials
- Formal nursing education
- Professional licenses
- Professional certificates
- Employment history
- Military service
- Community service
- Continuing education
- Professional Committee involvement
- Educational presentations
- Evidence-based initiatives
- Continuous quality improvement projects
- Professional writing
- Academic courses
- Precepting and monitoring activities
- Examples of an individualized care plan
- Research utilization in your practice
- Forms developed
- Information on grants, awards, honors, and scholarships received
- Information on membership and involvement in professional organizations
- Photographs of memorable displays such as a poster presentation or school nurse notice board (Beirne, 2009).
- Professional certification (Bradley, 2001)
- Skill checklists (Bradley, 2001)
- Updated curriculum vitae (Bradley, 2001).
- Materials developed for classroom teaching (Tustin et al., 2002)
- Documentation related to campus and community health activities (Tustin et al., 2002).
Red Flags for School Nurse Evaluation

Liability exists when school administrators, who do not fully understand the scope and standards of school nursing practice, are responsible for supervising and evaluating the clinical competency of the school nurse (Hootman, 2013; McDaniel et al., NASN, 2013). Hootman (2013) recommended possible options for school nurse evaluation when there is not a professional nurse to provide oversight that included a nursing supervisor from a local public health department or a neighboring school district. Hootman (2013) further emphasized that it is the responsibility of the school nurse to discuss their roles and responsibilities with those who coordinate or supervise school health services.

References


