

**METHODIST  
HEALTHCARE SYSTEM**

*“Serving Humanity to Honor God”*

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**Methodist Healthcare System  
Clinical Excellence Program for RNs**

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## Introduction

The mission of the Clinical Excellence Program is to give individual recognition within the profession of nursing at Methodist Healthcare System. The Clinical Excellence Program offers support and incentives to participate in continuing education, service, leadership, and quality improvement in accordance with our pillars of excellence: people, service, quality and growth. It is the involvement in these professional activities that serve to strengthen the entire body of nursing and improve patient outcomes.

## Goals

- Enhance recruitment to attract new nursing staff
- Enhance retention for current staff by recognizing nurses with advanced skills
- Allow nursing to be proactive in their nursing career development
- Promote development of clinicians who demonstrate performance skills, utilization of the nursing process, ethics, education, leadership and performance improvement.

## Concept

The Clinical Excellence Program has evolved conceptually into a way to recognize and reward health care professionals who go above and beyond in service to their patients. This service is in support of the patient through Education, Service, Leadership, and Quality improvement and Benchmarking.

Methodist Healthcare System Clinical Excellence program is based on a point system. Each enrolled nurse will keep track of points earned during the program year. The program has two levels with a minimum number of points required to qualify for each level. Achievement of a level will qualify the professional nurse for a pay incentive. The primary focus of the program is **professionalism**. Once the application process has begun, it becomes the responsibility of the professional nurse to maintain a record of his/her activities and achievements. This record will be in the form of a "portfolio" presented to the nurse director at annual evaluation. The ladder establishes the expectations that the nurse will be personally accountable for his/her practice.

## Enrollment Process

The ability to enroll requires that certain application criteria be met. Full and part-time inpatient and outpatient RNs with two years professional nursing experience who have been full-time or part-time Registered Nurses at Methodist Healthcare for the last 12 months and worked a minimum of 1,000 bedside hours within the year of application. Nurses that are **not** eligible include: clinical nurse specialists, nurse clinicians, case managers, nurse directors, PRN nurses, salaried exempt nurses, nurse practitioners, and graduate nurses with less than one year work experience as a licensed health care provider.

### Application Criteria

- Must regularly work an average of at least 20 hours per week
- Must have 2 years RN experience before eligible for advancement

- Must be in compliance with attendance and punctuality policy
  - Must meet clinical and behavioral performance objectives, i.e. is not on disciplinary action. **Note:** If employee is on final warning, they must come off the ladder
  - **Nurse leader must sign application and provide letter of support**
  - **Nurse leader must initial each program criteria met by the RN listed on the Clinical Excellence Program Scoring Tool**
  - **Portfolio must be reviewed and signed by a liaison**
  - **All criteria must be maintained during the year.**
1. \*The health care professional is responsible for informing his/her leader of their request to enroll. Application must be completed and turned in to the Human Resources Dept (HR) as follows:

- |                  |   |
|------------------|---|
| - Medical Center | John E. Hornbeak Bldg, 3 <sup>rd</sup> fl, Rm 3129<br>4450 Medical Drive<br>or<br>MHS System Office<br>8109 Fredericksburg Road, 1 <sup>st</sup> fl |
| - MSOH           | 1139 E. Sonterra Blvd, 1 <sup>st</sup> fl   |
| - MMH            | 1310 McCullough, 1 <sup>st</sup> fl   |
| - NEMH           | 12412 Judson Road<br>Live Oak, TX   |

2. Advancement to the next higher level can be no sooner than 12 months from attainment of previous level.
3. Documentation of involvement and points earned must be presented in the completed portfolio at evaluation.
- \*Note:** The usual timeframe to prepare a well documented packet can take from 6-8 months. Select staff may have many points prior to application and could lead to a shorter period for some individuals.

**Contact number for questions related to application criteria/process:  
(210) 883-7918**

## **Portfolio Submission**

Each candidate will submit a portfolio, which contains a brief cover page, including name, profession, education/degree, specialty areas and position held, number of years in practice and number of years employed at Methodist Healthcare.

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## Portfolio Tips

- **Typed or neatly written - Bound or in a 3-ring binder**
  - **Include copies of schedules/letters - Divided in to sections**
  - **Community Service - Reflect your personality**
  - **Creative/Professional - Pictures optional**
- 
- 

1. Portfolio must contain documentation of achievements/involvement. This can and should include a copy of all program certificates, copy of advanced certifications, and documentation of service hours, quality research, leadership or educational projects.
2. Current involvement is required in at least three out of the four areas: Education, Service, Leadership, and Quality Improvement/Benchmarking. Current involvement is defined as points earned from professional involvement during the program year. **Points are not retroactive, and must be earned during the program year.**
3. The Clinical Excellence Program Review Team will evaluate and award achievement of level.

## Maintaining Level

A portfolio will be submitted yearly to Nurse Director at the employee evaluation date to show maintenance of level. Portfolio may be subject to audit by Clinical Excellence Program Review Team.

## Summary of Major Categories

**Note:** Points must be accrued in at least three of the four major categories

### **Education – Pillar: People**

The professional nurse is involved in continuing education through training programs in advanced skills and certification. The professional nurse is involved in obtaining health related degrees at accredited colleges and universities.

### **Service – Pillar: Service**

The professional nurse is involved in promoting health through patient education and service to the community and to the hospital.

### **Leadership – Pillar: Growth**

The professional nurse participated in a manager/leadership function to promote improvement in patient care and outcomes.

### **Quality Improvement/Benchmarking – Pillar: Quality, Financial**

The professional nurse involved in evaluation and research related to improvement in patient care and outcomes.

## Education

- A. Professional nurse participated in continuing education. Points awarded reflect number of CEUs obtained.
1. Education programs need to be as closely related to the specific areas of nursing practice as possible. For example: PALS; PICC, Labor and Delivery Skills (Fetal Monitoring, Intrapartum); NALS, ACLS; NICU Skills (NRP Intubation); Chemotherapy Skills; TNCC.
  2. The professional nurse is responsible for producing a record of education hours/CEs from programs attended. (4 points maximum).

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**2 points = ≥ 20 hours**  
**3 points = ≥ 24 hours**  
**4 points = ≥ 28 hours**

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- B. The professional nurse is currently enrolled in or has successfully completed an additional degree. The points for the degree are applicable every year.

<u>Degree</u>	<u>Currently Enrolled</u>	<u>Successfully Completed</u>
BSN	2 points	4 points
MSN	2 points	8 points
Ph.D.	2 points	12 points

- C. Professional nurse has sought and gained advanced professional certification related to field of expertise. 5 points for certification in current specialty **area**. 1 point for secondary certification if not eligible for current clinical area.

*Certification list can be found as a separate document titled: National Certifications on the Clinical Excellence website.*

- D. Clinical Education. Providing hospital based advanced practice instruction listed in Education Section –A-1. 0.5 points per hour to a maximum of 4 points maximum for this category. This education is based on another party's instructional materials. For example, from the American Heart Association or from an equipment vendor.
- E. Membership in professional nursing organizations listed in Section C. 0.5 points;
- F. Attendance at greater than 50% of the local professional nursing organization meetings. 1 point.
- G. Leadership role/Officer in professional nursing organization. 2 points.

## Service

### A. Community Service. The professional nurse is involved in voluntary community education and health promotion.

1. This can and should include health fairs. MHS sponsored events - 1.0 points for each hour. 4 point maximum. Non-MHS sponsored events – 0.5 points for each hour. 4 point maximum.
2. The professional nurse is involved in patient and community education and /or service (school, churches, and civic groups). Documentation of education can consist of a goal, brief outline and teaching aids (evaluation, sign-in sheet, etc.) 0.5 points for each hour. 4 point max.
3. Involved in ongoing service activity as a volunteer (youth sports coaching, elementary school mentor, PTA). 2 point max.
- 4.

### B. Military Service: Active or Retired. Professional nurse serves their country through active duty in military service. 1 point awarded.

### C. Hospital Service.

1. Float/Rotation. Professional nurse provided service to other units, based on their needs and in addition to scheduled shift. 5 **extra shifts** worked outside of home department = 1 point. 6-10 extra shifts worked = 2 points. 11-15 = 3 points. 16-20 = 4 points. 21-25 = 5 points. 26 plus = 6 points max. Note: Not eligible to use points in this section if on contract to work extra shifts.
2. Volunteers to work **extra** shifts and on call for own unit – 5 extra shifts = 1 point. 6-10 extra shifts worked = 2 points. 11-15 = 3 points. 16-20 = 4 points. 21-25 = 5 points. 26 plus = 6 points max. (may not include contract shifts) Not eligible to use points in this section if on contract to work extra shifts.
3. RN who agrees to work extra shift as a last minute/urgent call for help will be eligible for 0.5 points per shift up to a maximum of 2 points.
4. Loyalty/Years of Service at MHS 1 year completed = 1point. 2-5 years completed = 2 points. 6-10 years completed = 3 points. 11-15 years completed = 4 points. 16-20 years completed = 5 points. 21 plus years completed = 6 points.
5. Service on a hospital team/committee. Participates and attends regularly (at least 50% of the time) a hospital based team/committee for the tenure of 12 months = 2 points. Service on a hospital/team committee for the tenure of 6-12 months = 1 point; 1-5 months = 0.5 point
6. Service on a departmental or unit-based team/committee for the tenure of 1-5 months - 0.5 point. Service on a departmental or unit-based team/committee for the tenure of 6-12 months = 1 point. Development of communication or story board = 0.5 point; 2 points max.

7. Refers qualified RN to work at Methodist Healthcare System. If employee is selected and completes 90 day period, the referring nurse gets 1 point. The application must include the referring nurse. 1 point max.
8. Receives recognition by family member, or other Department. 1 point per recognition (max 2 points).
9. No call in for 1 year. 2 points. No Call in for 6 months. 1 point
10. No tardiness for 6 months = 0.5 point. No tardiness for 1 year = 1 point.

Note: FMLA is not considered when assessing staff attendance requirements.

## Leadership

- A. The professional nurse serves as a formal resource or a “go to” person in a specialized practice related to nursing care (Unit Champions; super users, etc.). The resource designation is defined in collaboration with the Director. 1 point per proficiency; 3 points max. Proficiency must be identified at the time of yearly evaluation for point credit in the next year. This role is formally designated on the unit of employment.
- B. The professional nurse serves as preceptor. The preceptor is a personal orientation buddy to help an employee or student with clinical orientation.
  1. Points awarded are based on the number of hours spent preceptoring.

<b>Points</b>	<b>Hours</b>
1 point	36-40 hours
2 points	41-80 hours
3 points	81-120 hours
4 points	121-160 hours
5 points	161-200 hours (Roughly five (5) weeks of preceptoring)
7 points	> 200 hours of preceptoring
Maximum	

- C. Resource person for health profession students and floating personnel. Must document at least one student. 1 point.
- D. Professional nurse works in a “charge” capacity. Occasionally: assumes charge nurse responsibility as relief for at least 12 shifts per year (2 points); 12-40 shifts per year (3 points) and consistently assumes charge nurse responsibility on majority of shifts worked (>40 shifts per year = 4 points). Permanent charge nurses are not eligible for points in this area due to charge compensation.
- E. The professional nurse is involved in the responsibility of management through development or review of Policies and Procedures, Care Maps, Pathways, staffing and scheduling.
  - 1 point for each policy and procedure or care map/pathway review/revision.



- 2 points - Participates on a team that develops new policy and procedure or clinical documentation tool/system.
- 4 points – Functions as a team leader in the development of procedure/protocol/standard of care.

F. The professional nurse is involved in staffing and scheduling.

1 point for 6 week schedule preparation for > 20 staff. If unit has less than 20 staff, schedules may be cumulatively counted to achieve a point, example: a unit with 10 staff; preparation of two 6 week schedules would receive 1 point. (4 points max. during year).

G. The professional nurse develops presentation and serves as an educator to the hospital staff. Please note staff teaching projects must be formal. They must consist of a goal, brief outline and teaching aids (participant evaluation, sign-in sheet, etc.)

- 1 point per topic Develop self-study teaching aid -- 2 max
- 2 point per topic 30 minute presentations – no CEU -- 4 point max
- 6 points per topic 50 minute presentations – with CEU

H. Leadership role (Chair/Co-Chair) for hospital based committee: unit 1 pt, hospital 2 pts, and system 3 pts, 3 pt max.

I. Serve as Clinical Excellence Liaison for unit. 1 point

J. The professional nurse serves as a role model in health promotion and self-wellness. Evidence of participation: An ongoing fitness plan for him/her (e.g. aerobics class attendance schedule, smoking cessation, etc.) 1 point total

## **Quality Improvement/Benchmarking**

A. The professional nurse is involved in quality improvement/benchmarking to enhance quality in their area of practice. This can include:

1. Evaluation and improvement of a selected process. Example: Research and benchmark facilities doing Decubitus prevention; IHI initiatives, Evidenced Based Care, Throughput, etc.
2. Evaluation and improvement of a selected product. Example: Researching and benchmarking new products such as thermometers. RN assumes a leadership role in unit based Quality Improvement project – 6 points

RN participates in unit based Quality Improvement project – 3 points

Maximum 6 points

B. Professional nurse submits research for professional publication. 2 points if article is submitted. 4 points if article is published.

C. Professional nurse published clinical-related article in internal publication.

0.5 points per article. 1 point max.

- D. Professional nurse identifies and resolves safety issue on unit. Example: Notes major safety issue in environment and implements permanent resolution. 1 pt; 2 pts max.
- E. Completes unit based audits which support hospital based clinical quality projects. Examples: Chart audits, survey readiness checklist completion, pressure ulcer prevalence.  
1-5 months 0.5 pts; 6-12 months 1 pt.
- F. Proposes new product for unit/specialty evaluation; collaborates with Materials Management related to cost effectiveness: evaluates and makes recommendations for new product/s. 2 points
- G. Identifies and implements cost cutting measures 2 pts. 4 pts maximum

# Application for Clinical Excellence Program

Name: \_\_\_\_\_  
First Middle Last

Address: \_\_\_\_\_  
\_\_\_\_\_  
City State Zip

Phone: \_\_\_\_\_  
Home Other Contact

Position: \_\_\_\_\_

Department # \_\_\_\_\_

Hospital: \_\_\_\_\_

Unit: \_\_\_\_\_

Average hours worked per pay period: \_\_\_\_\_

Unit Director: \_\_\_\_\_

Contact #: \_\_\_\_\_

Years of Practice: \_\_\_\_\_

Date of Hire: \_\_\_\_\_

Current Level: \_\_\_\_\_

Applying for Level:  III  IV

I am in compliance with attendance and punctuality policy:  yes  no

I demonstrate Methodist Excellence Standards:  yes  no

I am not on a corrective action plan:  true  false

I comply with unit staff meeting attendance expectation:  yes  no

## Review of Portfolio by Liaison (Initial Program Application **Only**)

Liaison's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Applicant acknowledges that he/she will commit to meet the application criteria. Applicant understands that his/her level will be reviewed each year. Each year applicant will submit a portfolio to director at time of annual evaluation. Portfolio will document continued compliance with program criteria.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Leader's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Clinical Excellence Program Scoring Tool

NOTE: Participant must have points in 3 of 4 categories

<b>Name:</b>		
Level III	> or = to 15 points	Performance Evaluation Date:
Level IV	> or = to 25 points	Cost Center:

Program Criteria	Max Points	Final Points	Leader Initials
<b>I. EDUCATION (Pillar: People)</b>			
A. Education programs / contact hours ≥20 hours=2 pts    ≥24 hours=3 pts    ≥28 hours=4 pts	4 max		
B. Completed advanced educational nursing degrees BSN enrolled 2 pts; completed 4 pts; MSN enrolled 2 pts; completed 8 pts; PhD enrolled 2 pts; completed 12 pts	degree specific		
C. Professional certification: 5 points for certification in current specialty area; 1 point for secondary certification if not eligible for current specialty area.	1 pt secondary 5pts max		
D. Clinical education – hospital-based advanced practice instruction 0.5 pts/hr	4 max		
E. Professional organization membership .5 pt	0.5 max		
F. Attendance at 50% of Professional Organizational Meetings	1 max		
G. Leader/Officer in Professional Organization	2 max		
<b>II. SERVICE (Pillar: Service)</b>			
A. Community Service			
1. Voluntary community health activity 1.0 pts/hour MHS/0.5/hr. non MHS	4 max		
2. Community education/service for health promotion 0.5 pts/hour	4 max		
3. Ongoing community service volunteer activity 2 pt.	2 max		
B. 5. Military Service 1 pt.	1 max		
C. Hospital Service			
1. Float/rotation to other units: 5 extra shifts worked=1pt; 6-10 shifts worked=2 pts; 11-15=3 pts; 16-20=4 pts; 21-25=5 pts; 26+ extra shifts=6 pts.	6 max		
2. Volunteers to work extra shifts on own unit and extra on call: 5 extra shifts worked=1pt; 6-10 shifts worked=2 pts; 11-15=3 pts; 16-20=4 pts; 21-25=5 pts; 26+ extra shifts=6 pts.	6 max		
3. RN works extra shift as last minute/urgent call – 0.5 points per shift – max 2 points	2 max		
4. Loyalty – Years of Service total time at MHS 1 year = 1 pt                      11-15 years = 4 pts 2-5 years = 2 pt                    16-20 years = 5 pts 6-10 years = 3 pts                21+ years = 6 pts	6 max		
5. Service on Interdisciplinary Hospital Team/Committee At least one year = 2 pts	2 max		
6. Service on Department or Unit-Based Team/Committee 1-5 months = .5 pt; 6-12 months=1 pt; development of dept. board .5 pt	2 max		
7. Refer a qualified nurse to a posted vacancy. Nurse stays at least 90 days.	1 max		
8. Recognition by family member or other department. 1 pt per recognition, 2 pt max.	2 max		
9. No call in for 1 year. 2 pt max; no call in for 6 mo. 1 pt	2 max		
10. No tardiness 6 months 0.5 pt; 1 year 1 pt	1 max		

<b>III. LEADERSHIP (Pillar: Growth)</b>			
A. Formal staff resource – The “go to” person	1 pt/activity	3 max	
B. Preceptor employee/student		7 max	
36-40 hrs =	1 pt		
41-80 hrs =	2 pt		
81-120 hrs =	3 pt		
121-160 hrs =	4 pt		
161-200 hrs =	5 pt		
>200 hrs =	7 pt		
C. Resource person for health profession students & floating personnel.	1 pt.	1 max	
D. Charge Nurse 12-40 shifts	3 pt	12-40 3	
At least one full shift per month 12/year	2 pt or	12/yr 2	
Consistent Charge Nurse 40/yr	4 pt	40/yr 4	
E. Policies and procedure review and revision	1 pt each	2 max	
Development of policies and procedures	2 pt	2 max	
Formal Hospital Team Leader for development of Policies/procedures/protocol/standard of care	4 pt	4 max	
F. 6 week staff schedule	1 pt	4 max	
G. Hospital Staff Educator			
1. Develop self-study teaching	1 pt	2 max	
2. 30 minute staff presentation (no CEU)	2 pt	4 max	
3. 50 minutes staff presentation (with CEU)	6 pt	6 max	
H. Leadership role – Chair/Co-Chair - Unit Committee	1 pt		
Hospital	2 pt	3 max	
System	3 pt		
I. Clinical Excellence Liaison	1 pt	1 max	
J. Self-wellness program	1 pt	1 max	
<b>IV. QUALITY IMPROVEMENT/BENCHMARKING (Pillar: Quality &amp; Financial)</b>			
A. Improvement of Patient Care (leader approved) (Clinically focused research resulting in <i>implemented</i> bright idea) participate=3 pts; lead role=6 pts Benchmarking other institutions specific clinical issues		6 max	
B. Publication in professional journal 2 points for submission; 4 points for publication		4 max	
C. Clinical-related quality article in internal publication	0.5 per; 1 pt max	1 max	
D. Identifies and resolves safety issue	1 pt ea	2 max	
E. Completes quality audits 1-5 months	0.5 pt	2 max	
6-12 months	1 pt		
F. Identifies and implements cost cutting measure	2pts, 4pt max	4 max	
G. Proposes new product for unit/specialty evaluation	2 pts 2 max	2 max	
<b>TOTAL POINTS ACHIEVED</b>			

Level: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Leader's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Team Review: \_\_\_\_\_

Date: \_\_\_\_\_