

# Developing a Professional Portfolio in Nursing

**Marilyn H. Oermann**

*A professional portfolio is a collection of carefully selected materials that document the nurse's competencies and illustrate the expertise of the nurse. Since a portfolio is developed over time, it also provides a way of monitoring professional development. By periodically reviewing the portfolio, nurses can assess their progress in meeting personal and professional goals and can better plan their careers in nursing. This article describes professional portfolios, their uses in nursing, and how to develop and maintain one.*

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**A**ll nurses should maintain a professional portfolio to reflect on their own development of knowledge and skills over time, present evidence of competencies, and market themselves when applying for career ladder positions or new jobs in nursing.

A professional portfolio contains materials that document the nurse's competencies and experiences and illustrate the career path of the nurse. Artists, photographers, designers, and other professionals use portfolios to showcase their work for clients and potential employers. Portfolios in nursing accomplish the same purpose — they showcase the nurse's background and expertise for others to review. This article describes professional portfolios, their uses in nursing, and how to develop and maintain one.

## **Professional Portfolios**

A professional portfolio is a compilation of carefully selected materials that

document the nurse's competencies. The materials placed in a portfolio illustrate the background, skills, and expertise of the nurse (Trossman, 1999). The portfolio also provides a way of monitoring the nurse's own professional development. By periodically reviewing the portfolio, nurses can assess their progress in meeting personal and professional goals and can better plan their careers in nursing.

The portfolio does not replace the resume or curriculum vitae, but provides information not available from these alone. A resume and curriculum vitae list the educational institutions attended, the positions held, and other background information about the nurse. The portfolio provides evidence of the competencies and expertise of the nurse developed as a result of these experiences.

## **Types of Portfolios**

There are two types of portfolios, *best-work* and *growth and development* (Gaberson & Oermann, 1999; Oermann & Gaberson, 1998). Best-work portfolios provide evidence of the nurse's competencies and expertise. These portfolios are used as documentation for career ladder promotions, job applications, annual performance reviews, accreditations, initial and continuing certification, and situations in which other people will be reviewing the portfolio. These portfolios contain carefully selected materials that are organized, labeled, and prepared for review by others.

Growth and development portfolios are designed for nurses to monitor

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their progress in meeting personal and professional learning goals. Nurses use this type of portfolio to evaluate their own learning and development, not for others to review. The growth and development portfolio is a working document that provides ongoing evidence of competencies. The nurse can then select materials from this document to include in a best-work portfolio that is shown to others.

### **Uses of Portfolios in Nursing**

Portfolios in nursing may be used for professional development, for career ladder promotions and with job applications, for annual performance appraisals, as documentation of employee performance for accreditation surveys, when applying to educational programs, and to document continuing competence.

#### **Professional Development**

A portfolio enables nurses to monitor the development of their competencies over a period of time. The documents in a portfolio provide evidence of what has been accomplished to meet personal and professional learning needs, progress in achieving career goals, and where further learning is needed.

Used in this way, the portfolio serves as a plan for professional development. Registered dietitians and dietetic technicians recently began using the portfolio for recertification; the portfolio includes a learning plan, a log of completed continuing professional activities with supporting docu-

mentation, and an evaluation of outcomes of learning (Pertel, 1999).

In nursing the portfolio could be used as a continued competency documentation tool. Nurses could list learning activities they have completed, evaluate their effectiveness in promoting professional growth and continued competency, and specify goals to be accomplished.

In using the portfolio as a plan for professional development, the nurse progresses through four steps, similar to the nursing process.

**1** Step 1 is the learning needs assessment in which the nurse evaluates his or her own knowledge and skills to identify areas for further learning. From this needs assessment, the nurse identifies personal and professional goals to be met. This step is similar to the assessment and diagnostic phases of the nursing process (Oermann, 1998).

**2** The next step is to develop a plan for meeting those learning needs. The plan may include inservice and continuing education, completion of selected clinical experiences and other types of learning activities, independent practice of skills, reading of articles and other types of publications to fill gaps in knowledge, and many others. All of these activities with accompanying due dates are included in the learning plan.

**3** The third step is implementation of the plan, which involves completing the activities specified in it. The implementation dates are included, thereby providing a record of con-

tinued learning and development for review by others. It also is helpful to include a list of materials to be collected for the portfolio that provide evidence of the learning activities completed, such as records of continuing education.

**4** The final step is evaluation of the outcomes of learning and revision of the plan if indicated. In this step, the nurse assesses progress made in meeting learning needs and decides on areas for continued professional development. The portfolio includes the plan for professional development with accompanying materials that validate completion of the learning activities, competencies developed and maintained, new knowledge gained, and other outcomes of learning. Table 1 provides a sample professional development plan that can be included in a portfolio.

A portfolio used in this way also helps nurses in planning their careers. All too often nurses change positions without considering where they want to be in 1, 5, and 10 years, and they do not evaluate how each position fits into their career plans. In the portfolio, the nurse can list professional goals to be achieved and related time frames and can use the portfolio to monitor progress in meeting them. In this way, the portfolio is a career-planning journal that guides setting career goals and making career decisions (Koch et al., 1998).

#### **Career Ladder Promotions and Job Mobility**

Another use of the portfolio is for career ladder promotions within the organization and for seeking new positions in nursing. The portfolio provides justification for a career ladder promotion in the clinical setting and contains documents that support it (Brooks et al., 1998).

The nurse also can use a portfolio when applying for a new position. The portfolio demonstrates to the potential employer the knowledge, skills, and relevant experiences of the nurse. With the portfolio, nurses can more easily market themselves to potential employers, illustrating their value and how they could fulfill the demands of the position. Portfolios allow nurses to take control of their professional development (Brooks & Madda, 1999). A related advantage is that the portfolio is readily available for career transitions.

**TABLE 1**  
**Sample Plan for Professional Development**

Learning Needs	Goal	Learning Activities with Due Dates	Activity and Date Done	Contact Hours	Evaluation	Supporting Materials in Portfolio
Patient education	Improve knowledge and skills for teaching patients with varied health problems	Develop teaching plans for patients on unit/adapt standardized plans; have manager or another expert nurse review them (due 10/01)	3 plans developed and reviewed by manager; 9/22/01		Improved understanding of how to adapt teaching materials for patients. Written plans met criteria established by manager and used in facility	3 teaching plans
		Attend CE program on patient teaching (due before 1/02)	Attended inservice program on 11/12/01	4 contact hours	Passed posttest	Copy of program; certificate of attendance; posttest results
		Read articles on patient teaching (due 9/01)	Read two articles (see portfolio documents); 9/2/01	Passed CE test with article for 2 contact hours	Able to use concepts in own teaching; improved strategies for teaching older patients	Articles; certificate indicating contact hours received
		Review Internet sites that could be used by patients on unit (due 11/01)	Served on committee to review sites; completed literature review and evaluated 28 Internet sites. Project completed 1/4/02		Sites being developed as handout for patients; improved knowledge of using Internet for health teaching	Worksheets for review of sites; final document
		Serve on unit patient education committee (join by 10/01)	Committee member; developed pamphlet on calcium supplements		Continuing committee member	Committee minutes; summary report

### Annual Performance Appraisals

In addition to self growth and professional development, the portfolio also is a valuable tool for annual performance appraisals. When portfolios are used for self-growth, this is defined as formative evaluation. This type of evaluation gives feedback to the nurse about progress in developing competencies for practice. Formative evalua-

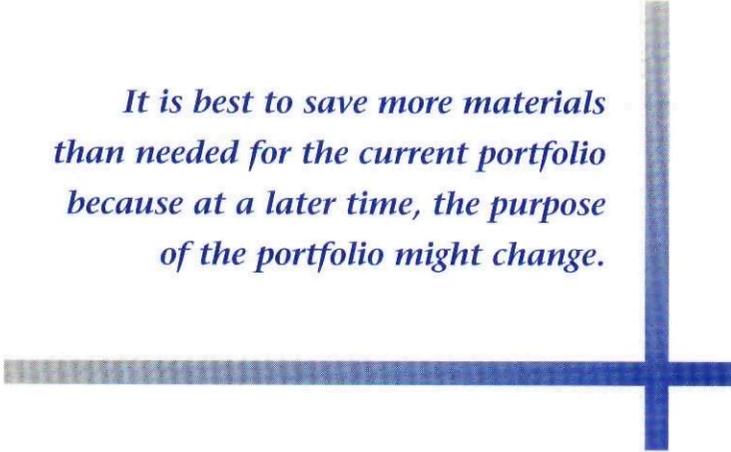
tion identifies where further learning and development are needed.

Annual performance appraisals, a form of summative evaluation, are done at periodic intervals to indicate the extent to which the nurse has achieved specific competencies. Summative evaluation certifies the competencies of the nurse at a particular point in time (Oermann, 1998, 1999;

Oermann & Gaberson, 1998).

For annual reviews the nurse can collect and organize documents that demonstrate achievement of the performance standards. The portfolio then shows how the nurse met these standards or exceeded them. The portfolio can be submitted to the manager before the annual review so the manager has this documentation when

*It is best to save more materials than needed for the current portfolio because at a later time, the purpose of the portfolio might change.*



completing the review. In this way the portfolio validates and supplements known information about the nurse (Brooks & Mada, 1999).

### **Accreditation Surveys**

Portfolios also can be used for accreditation surveys as a means of documenting employees' performance and to provide additional data to support the accreditation standards. With Joint Commission on Accreditation of Healthcare Organizations surveys, the portfolio complements the human resource files by containing documents that validate the nurse's competencies (Brooks & Mada, 1999).

### **Applications for Nursing Education Programs**

In some nursing education programs, a portfolio can be submitted with the application materials. The portfolio can be used to summarize past educational and work experiences as a basis for advanced placement in the nursing program. Once accepted into the program, the nurse can expand the portfolio to include new knowledge and skills acquired in the program.

### **Continuing Competence Documentation**

Portfolios provide documentation of continued competence of the nurse. There are some proposals being considered that would require RNs to maintain a professional portfolio for relicensure and certification.

Examples of documents for the portfolio are skill assessment inventories; testing at specified intervals (e.g.,

computer-simulated testing in the practice specialty, initial specialty certification, or recertification testing); appraisals of role expectations and individual abilities; academic nursing education; continuing education directed toward the nurse's area of clinical practice; and partnerships between the regulatory body and employers for the purpose of validating nurses' competency in practice (McGuire et al., 1998).

Nurses in England are required to maintain a personal professional profile, a portfolio, as a record of their professional development and how they fulfilled the requirements for continuing education (English National Board for Nursing, Midwifery and Health Visiting, 1998).

Portfolios are an effective way of validating competencies for recertification. In a portfolio nurses can collect materials that provide evidence of their continuing competencies and how they developed them.

### **Documents to Include in a Portfolio**

The documents in a professional portfolio are selected according to its purpose. Materials in a portfolio for self growth and career development will differ from ones in a portfolio designed to justify a career ladder promotion. Differences also occur because of variations in nurses' clinical specialties, units and settings in which employed, responsibilities, and goals. Nurses vary in the competencies they need to maintain, which ultimately

affects the documents placed in a portfolio. As a result, no two portfolios will be the same.

Because there are so many documents that could be placed in a portfolio, the nurse should be selective about what to include. The portfolio should contain materials that illustrate the nurse's competencies, highlight achievements and educational accomplishments, and achieve the purpose of developing the portfolio, rather than every document produced in a career.

For example, to demonstrate competencies in multidisciplinary collaboration, the portfolio might include materials developed by a collaborative practice team on which the nurse served, revised pathway and order set developed by the team noting the nurse's role in this team effort, educational program developed for nursing staff to prepare them for using the new pathway, minutes of meetings and the nurse's participation in them, and a letter from selected team members summarizing the nurse's contributions. Table 2 illustrates the types of documents that might be placed in a portfolio.

As documents are collected for the portfolio, the nurse should label and date them. It is best to save more materials than needed for the current portfolio because at a later time, the purpose of the portfolio might change. Materials can be organized in files so they are not misplaced, or they may be placed directly into the portfolio. Rather than placing all documents in one file, it is best to develop a filing system that matches the purposes of the portfolio. For instance, if the portfolio is intended to justify a career ladder promotion, files can be prepared for each criterion to be met; then as documents are collected, they can be placed in the file that relates to the criterion.

O'Halloran (1996) suggested using at least four separate files:

- Education, which contains the resume or curriculum vitae, other formal education, the license number and state, certifications with titles and organizations, and awards
- Performance, including position descriptions and evaluations of performance, reference letters, commendations, and other evidence of meeting performance expectations
- Community service and profession-

**TABLE 2****Materials for Professional Portfolio**

- Resume
- Plan for professional development with supporting documents that verify activities completed and learning outcomes
- Academic transcripts indicating completion of nursing programs and additional course work
- Health records
- Job description
- Performance appraisals
- Competency checklists
- Certifications (e.g., ACLS and specialty certifications) with renewal dates and hours completed toward recertification
- Continuing education (with documentation of contact hours) and relationship to personal and professional goals
- Inservice education programs attended (e.g., skill updates, competency validations, unit-based programs, and others) with record of attendance
- Other types of educational experiences completed in the organization with record of attendance
- Materials produced for patients and staff (e.g., teaching plans, forms, skills checklists, and others); quality improvement projects; and other materials that indicate knowledge, competencies, and expertise of nurse
- List of committees, materials developed by committees, and documentation of participation (e.g., minutes of meetings, reports of committees, summary of responsibilities for committee work)
- Presentations given on unit, in clinical agency, in community, and in other settings; documents developed for presentations (e.g., programs, lecture outlines, handouts, sample transparencies and slides [hard copies], learning activities completed by participants, and others); and summaries of participants' evaluations
- Projects on unit and institution-wide, grants, and research studies with documentation of own role, funding if applicable, time frame of project, results, and how findings were disseminated (include reports of projects)
- Writing samples (e.g., published articles in refereed journals, papers in non-refereed journals, columns, newsletters, book reviews, summaries of literature reviews, letters to the editor, flyers, and other examples of writing skills)

al nursing activities in the community, such as membership in nursing and other types of organizations, committee work, and other types of participation

- Continuing education with documentation of programs attended, CEUs and contact hours received, and outcomes of learning from these programs

When the portfolio will be reviewed by others, the nurse should select the most relevant documents to include, organize them logically, and label each one. In organizing and labeling the materials, the nurse should make the relationship clear between the documents and competencies they validate, should indicate how the materials support a performance appraisal or career ladder promotion, and should clarify how they demonstrate the nurse's knowledge and expertise. Review of the portfolio by a colleague will often show where further clarification is needed.

The portfolio can be placed in a three-ring binder with pockets. It is time-saving to develop as many documents as possible on the computer so

they can be updated easily. When the portfolio is reviewed by others, for instance, with annual performance appraisals or when applying for a new position, it should "look professional." This means that materials should be typed, sections should be labeled, and a table of contents should be prepared. The nurse's name and contact information should be easy to find. Often nurses include their resumes or curriculum vita in a portfolio, which can be placed in the beginning.

### Next Step

Nurses across clinical specialties and settings need a portfolio for the reasons outlined in this article. The portfolio should be started now if not done already to avoid lost opportunities to save documents for it. With so many career opportunities available for nurses, the portfolio might be needed at any time when the nurse is pursuing a promotion in the clinical setting, considering a new position in the agency, or applying for a new position. Once initiated, the portfolio can then be maintained and reviewed

periodically to monitor growth and development and to document progress in meeting career goals.

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