**CLINICAL EVALUATION TOOL FOR B.S. NURSING STUDENTS
IN COURSE: NUR 311: LEADERSHIP IN THE MANAGEMENT OF CLIENT CARE**

Organizational Management	Criteria Met	Criteria Not Met	Criteria Not Applicable	Comments
• Identify nursing department/unit mission and philosophy of nursing statements (attach copies possible).	✓			Please see attached copy.
• Identify the overall objectives for the nursing department/unit to which he/she is assigned (attach copies whenever possible).	✓			This nursing unit (7 East) provides care to medical-surgical patients. Their objectives include providing optimal cost-effective care. There is also an emphasis on continuity of care.
• Obtain a copy of the organizational structure to illustrate the formal hierarchy and reporting structure for this nursing division, department, service, or unit.	✓			The organizational structure of this unit follows a matrix organizational design.

Please see attached copy. |
• Assess the informal network that might influence communication and managerial functioning within this structure.	✓			The informal network that influences managerial functioning includes experienced, senior nurses who are able to solve problems before they reach the supervisor's desk, as well as seasoned nurse's aides who function within their capacity to identify when something is wrong (although they do not assess). The supervisor stated that the goal is to train all nursing staff in a manner that allows the unit to function well without her having to be present.
• Attend at least four (4) of each of the following organizational meetings: staff meetings/rounds, ad hoc meetings, task forces, and/or committee meetings to accomplish managerial objectives.	✓			I attended three multidisciplinary rounds and one ad hoc meeting: (1) 6/9 (2) 6/16 (3) 6/26 – two meetings
• In general, identify what issue(s) might be addressed at these meetings?	✓			At multidisciplinary meetings, patient diagnoses, prognoses, any new developments were discussed. The meetings started off with the patient's name, room number, and diagnoses. Progress, consults, and possible discharge plans were stated. The last meeting I attended on 6/26 was an ad hoc meeting. A patient had attempted suicide for the second time within 7

				days. The head nurse reprimanded the staff on poor execution of one-to-one monitoring and hand-off reports; and she also explained the role of the nurse and nurse's aides in one-to-one.
Nursing Management and Leadership	**Criteria Met**	**Criteria Not Met**	**Criteria Not Applicable**	**Comments**
• Identify the management style in use in managing this nursing division, department/unit.	✓			The management style used on 7 East is *democratic leadership*. This type of leadership promotes autonomy, as staff members are encouraged to make decisions (within their scope of practice). The supervisor, Ms. Camacho, is the head of the unit, however she believes that good management allows for the unit to run smoothly without her physically being present. This is achieved through autonomous staff nurses who are also skilled in leadership.
• Indicate the method(s) used to orient new staff are oriented to the functioning of this nursing department/unit (obtain copies of training manuals/brochures/announcements whenever possible).	✓			Please see attached copies of orientation training checklist/manual.

In addition to the hospital orientation, new nurses are trained on the unit to be efficient leaders. New nurses are allowed to charge the floor when there are two senior nurses are also working during a particular shift. |
| • Indicate the method(s) used to develop current staff in their various professional and ancillary roles (obtain copies of training manuals/brochures/announcements whenever possible). | ✓ | | | Current staff is developed in their professional roles through mandated yearly in-service training, ad hoc meetings, and notification of any new policies, procedures, or changes.

Please see attached copies. |
| • Discuss with the nursing manager the management theory used in developing their employee evaluation tool, e.g., MBO, etc. | ✓ | | | The management theory used in developing the employee evaluation tool is management by objectives (MBO). The supervisor and the staff agree upon objectives outlined in the staff's functional job description, which both the supervisor and the employee sign. The performance |

				appraisal is conducted on the basis of how well the employee completed the agreed upon objectives. Please see attached copy of functional job description.
• Identify the method by which the nurse manager gathers data to complete an employee evaluation tool (obtain copies of evaluation tool whenever possible).	✓			Data is gathered through direct observation and interviewing of the staff. The employee evaluation tool is directly reflective of the staff member's job description. The supervisor also observes how well the employee gives report based on S-BAR. Please see attached copies of the functional job description, S-BAR, and performance appraisal.
• Observe plans, including strategies, for overcoming any staff member's resistance to cross-training or reassignment to a new unit or assignment (e.g., corrective action plan (CAP), performance appraisal, union arbitration process, etc.).	✓			Please see attached copies of Employee Notice of Counseling, Protest of Assignment/Union Arbitration Process, and Performance appraisal.
• Observe the ongoing budgetary process to support a staffing pattern for this nursing department/unit (obtain copies of budget whenever possible).			✓	The head nurse does not handle the unit budget and was unable to set an appointment with the budgeting officer.
• Identify the political/professional responsibilities of the nurse manager for the continued functioning of this nursing department/unit?	✓			The responsibilities of the supervisor are numerous. She is responsible for the overall smooth functioning of the unit. She is responsible for staffing, making assignments, and discipline. The supervisor is responsible for making sure that the unit runs in conjunction with JCAHO's regulations, infection control, and safety standards of OSHA. The supervisor ensures that all governmental and hospital policies, procedures, and guidelines are upheld. She is also responsible for delegating routine staff functions such as making sure the crash cart is plugged in, checking the expiration dates on life saving medications, and checking the

				temperature on the refrigerator. She must also go through patient charts, make sure that care plans are appropriate and signed, and she also participates in the multidisciplinary rounds. The supervisor also coordinates with external departments such as environmental services.
Nursing Management of Client Care	**Criteria Met**	**Criteria Not Met**	**Criteria Not Applicable**	**Comments**
• Obtain information about the composition (case mix) of the community that this nursing department/unit serves (obtain documentation about population demographics/statistics whenever possible).	✓			The hospital is located in Southern Brooklyn, zip code 11235. CIH serves a high percentage of the elderly (18% of the primary service area is 65 years or older). This unit gets a large amount of elderly admissions. An age specific care plan: geriatric is implemented for these patients. The main ethno-racial composition of the community served include Russians, Ukrainians, Pakistanians, and Chinese. The most prevalent languages of patients admitted are Russian, Urdu, Begali, Chinese, and Spanish
• Assess the method by which this unit's services are marketed to the specific health (physical, mental, social, cultural) needs of this community.	✓			CIH prints its Patient's Guide in English, Spanish, Russian, and Urdu. There are in person translators as well as telephone services that are available 24/7. CIH ensures that its services are marketable to the age groups, ethnic-racial classes, and socioeconomic statuses of the people of Southern Brooklyn. They tabulated the health needs of the community and highlighted the common illnesses, including diabetes, heart disease, cancer servies, and geriatric services for example. The priorities of the community as identified by CIH are diabetes, cardiovascular disease, behavioral health, asthma, and obesity.
• Identify how data is gathered about the specific and unique needs of this community.	✓			The facility assesses its patients, community stakeholders, and healthcare providers in focus groups,

				asking a variety of questions over 90 minutes. The information gathered from the focus groups was expanded on using a number of governmental sources; and issues raised were prioritized. Information from outreach programs in the community and Southern Brooklyn community groups are also utilized in assessing the needs of the community.
• Identify what organizational environmental forces (both internal and external) impact the functioning of this nursing department/unit.	✓			Organizational environmental forces that impact the functioning of the unit are the human resources department, the lab, and social work. These other disciplines directly impact the functioning of the unit on a daily basis. Forces external to the hospital include community based organizations, and nursing homes to which patients are often discharged.
• Identify the quality indicators, i.e., timeliness, appropriateness, safety, that are monitored within this nursing department/unit.	✓			Specific quality indicators that are monitored on this unit are fall prevention, suicide prevention, catheter acquired UTIs, and adequate care for ETOH/delirium tremens patients. They also monitor the occurrence of C. difficile, catheter related blood stream infections, surgical site infections, ventilator-associated pneumonia, and pressure ulcers. The quality indicators are monitored on the unit's Performance Improvement Board.
• Identify the method of documentation for the nursing department/unit, i.e., Electronic Medical Record or paper.	✓			The method of documentation used on 7 East is the electronic medical record, specifically QuadraMed.
• If not computerized, assess why it would be best to computerize this nursing department/unit for quality, cost-effective nursing care.			✓	This unit is computerized.
• If computerized, identify how nursing user/stakeholder functionality needs are determined?	✓			Nursing staff must be competent in computer literacy. Training programs are available through HR. Please see attached copies.