A lack of clarity about advanced nursing practice led a Welsh trust to develop a portfolio for advanced nurse practitioners to document the nature of their roles.

Developing a portfolio for advanced practice

Keywords: Advanced nursing practice/ Portfolio/Governance

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In this article...
- Discussion of advanced nursing practice
- Development of an advanced practice portfolio
- Benefits of the portfolio

Authors
Alison Townsend is advanced nurse practitioner for urology services; Andrea Croft is lead advanced nurse practitioner in anticoagulation, both at Princess of Wales Hospital, Abertawe Bro Morgannwg University Health Board.

Abstract
Townsend A et al (2015) Developing a portfolio for advanced practice. Nursing Times; 111: 23/24, 23-26. In the absence of national regulation of advanced nursing practice roles, employers need to ensure adequate governance arrangements are in place. The development and production of a robust portfolio can demonstrate advanced nursing practice is essential, but is not easily compiled because of the nature and complexity of the individual advanced nurse practitioner’s role. This article discusses the advanced nurse practitioner role and the need for the portfolio. It highlights the challenges encountered by nurses in a Welsh health board when producing the portfolio, which will be introduced in Wales to demonstrate clinical governance and ensure patient safety.

Advanced nurse practitioners (ANPs) are a senior clinical resource at the front line of care delivery, particularly in terms of addressing the challenges of workforce shortages in the NHS and managing long-term conditions and the ageing population (Townsend, 2014; Department of Health, 2007). The development of these roles presents significant opportunities for workforce/service development and innovation (National Leadership and Innovation Agency for Healthcare [NLIAH], 2013). Although advanced nursing practice is not a new concept, there is no single, universally agreed definition – it should be viewed as a level of practice rather than a specific role (DH, 2010; NLIAH, 2010; Scottish Government, 2008).

The basis of advanced nursing practice is a high degree of knowledge, skill and experience applied to achieve optimal outcomes through:
- Critical analysis;
- Problem solving;
- Evidence-based decision making (DH, 2010).

However, despite significant debate, advanced nursing roles are not subject to regulation, and the plethora of job titles makes it difficult for the general public to understand the level of care they can expect from ANPs.

The directorate of the chief nursing office for Scotland has developed an advanced practice toolkit (Scottish Government, 2008) that has been adopted as a platform to develop and support advanced practice in Wales. This requires that ANPs demonstrate their ability to work at advanced levels of competence encompassing all four pillars of practice (Fig 1) so they can use the title “advanced” (NLIAH, 2010; Scottish Government, 2008). More recently, local regulation and governance by employers that requires them to review their ANPs has been suggested to ensure practitioners are fit for purpose (DH, 2010; NLIAH, 2010).

ANP audit
Advanced nursing practice has existed for decades but, due to the complexities surrounding its development, the field has been led essentially by innovation in practice (Barton et al, 2012). In 2009 the nurse in...
charge of workforce planning in our hospital trust recognised the need to evaluate the “off-ward” nurses. Like other trusts, ours had limited data for managers and peers to understand the diverse nature of these roles, making their contribution difficult to define. The ANPs were therefore asked to complete a questionnaire so their roles and workload could be audited.

The audit showed that, although many roles evolved in an unregulated way, ANPs played an integral part in the successful management of the patient journey. The nursing executive subsequently used this data to create a database of ANPs, and quickly recognised a need to ensure robust governance arrangements were in place to protect the public, organisation, and the ANPs – particularly in light of how many of the roles had evolved.

Developing the profile
Following the audit the executive nurse for workforce planning invited some of the more experienced ANPs to join a task group to assist with the process of governance. The group comprised several specialist nurses and nurse practitioners with diverse roles in an attempt to ensure it was as inclusive as possible.

The group initially examined the available tools for demonstrating a level of practice – none appeared to cover all relevant aspects for each role and some were difficult to apply. Eventually the group agreed the Scottish toolkit and pillars of practice (Scottish Government, 2008) was the most appropriate and user friendly. This was subsequently used to develop an Abertawe Bro Morgannwg University Health Board governance framework (Barton et al, 2012). The group also identified the need for a live portfolio to establish a level of practice.

In October 2009, the portfolio guidelines were proposed to the health board’s nursing and midwifery professional forum and gained approval. The portfolio would use the four pillars of practice from the Scottish toolkit; this contains specific criteria for each pillar of practice and ANPs must provide evidence demonstrating that they fulfil the specified criteria and illustrating advanced practice (Box 1).

A portfolio used by one of the group was reviewed as a working example, as it contained evidence of achieved competencies and skills training. We agreed to use this as the initial template and adjust it as required by individual ANPs.

The executive nurse for workforce was also involved with the NLIAH group working on advanced practice for allied health professionals. As a result of this association with a national agency developing a framework for advanced practice, the work to develop a live portfolio was eventually rolled out across Wales.

Challenges encountered
A primary concern for all members of the group was what evidence to include in the portfolio. Some ANPs were able to obtain clinical data from the hospital information department as they had recordable clinical data, while others carried out procedures and were able to record these. However, collating recordable data alone did not demonstrate the level at which practitioners were performing, as most of this information only demonstrated the number of procedures or care episodes delivered. Those working in more supporting, rather than medically grounded, roles struggled to decide what evidence was appropriate.

The group found it difficult to decide on suitable evidence to show a level of practice. While the Scottish toolkit clearly sets out the “novice to expert” continuum, all the ANPs were very experienced and it

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was difficult to explain and demonstrate to others what made practice advanced. Having worked at this level for a long time, ANPs did not appreciate the level of knowledge behind daily decision making that informed their practice. Most were "unconsciously competent" in their roles, and found it difficult to articulate what made their practice advanced. In addition, most nurses' portfolios kept for the Nursing and Midwifery Council tended to contain certificates of formal training, informal evidence that demonstrated the actions taken regularly as a part of their roles. A key element was that the evidence would demonstrate safer practice, as governance was high on the health board agenda. Practice was therefore assessed using the health board's risk matrix and the areas requiring formal competencies or protocols were identified.

Collating evidence
Most of the work involved in collating portfolios involved the ANPs physically collating their evidence and organising it within the portfolio so others were able to easily read and digest it, resulting in their feeling reassured that the ANP was fit for practice at the advanced level. The evidence varied from signed-off protocols and assessments highlighting a level of clinical practice, to audits/contributions to strategic developments illustrating leadership and management elements of the role.

External validation
In June 2010 the group recognised that due to the diverse nature of ANP roles, we needed an academic to act as an external assessor to review the content so the portfolio could be recognised as universally valid. The aim was to ensure the portfolios contained Master's-level actions and decision making in line with NLIAH recommendations that all ANPs be working at this level.

The health board co-opted a member of Swansea University's faculty; throughout the summer the group met regularly and examined a range of documents and information including:
- The draft framework for Wales on advanced practice;
- The Scottish toolkit;
- 360-degree feedback;
- Clinical learning logs;
- Job planning;
- Templates.

During this period the academic member of the group suggested shifting towards more reflective evidence and excluding the robust competencies and protocols required to meet the governance element such as peer review of skills and risk assessment. However, the executive nursing team were concerned the revised portfolio did not meet the criteria for ensuring safe practice. We reverted to meeting as a nursing group without academic support with a view to focusing initially on the portfolio content required by the health board, and gaining academic validation at a later date. In hindsight this period highlighted the diverse opinions on what was required from a portfolio.

The health board portfolio guidance agreed by the group included a completed evidence matrix to help others decide what evidence was appropriate and relevant to demonstrate advanced practice. The evidence consisted of a number of documents; pieces of evidence could be used in more than one pillar. Commonly used documents included:
- Assessments of procedures (most of which were previously done by medical staff), signed off by a peer, including protocols (clinical pillar);
- Reflective accounts of particular incidents demonstrating the decision-making process, such as a critical incident and how the practitioner dealt with this, critical thinking skills, assessment and decision-making skills (clinical pillar);
- Anonymised case studies illustrating advanced knowledge and problem solving, as in Box 2 (clinical pillar).

Table 1 outlines what could be included in a portfolio for an ANP in endoscopy.

Box 2. CASE STUDY
A 71-year-old woman presented in accident and emergency complaining of shortness of breath with chest pain over the past six weeks. Medical history included mechanical aortic valve replacement (taking warfarin), chronic obstructive pulmonary disease and hypertension. The patient was admitted for investigations.

On admission her international normalised ratio (INR) was 2.2, slightly below the desired therapeutic range of 2.5-3.5. The patient usually attended her surgery INR clinic and took 13mg of warfarin daily. The INR was generally stable.

No medication changes were made during the admission. On day four the patient's INR was >10, warfarin was omitted and vitamin K given. The reason for the sudden rise in the INR was unknown. The anticoagulation advanced nurse practitioner was asked to speak to the patient to establish a cause for the high INR.

On extensive investigation no immediate cause was found, until the patient was asked if she ate the Welsh delicacy, laverbread (seaweed). Every Saturday evening since before her valve replacement, she ate 250g of laverbread for her tea. This Welsh treat, exceptionally high in vitamin K, had kept her INR steady for the past 10 years, until she came into hospital and did not have her usual Saturday tea.

The patient was asked to stop eating the laverbread until her INR was stabilised. She is now home on 6mg of warfarin daily with a stable INR – but, sadly, no more laverbread for tea.
future ANPs would have an allocated “buddy” to help them to do this. Buddies would be ANPs who had already successfully completed the process.

In early 2012 five group members’ portfolios were successfully signed off and the health board decided that to be able to use the title “advanced practitioner” all ANPs must complete a portfolio, which must be verified by the group and the university. As a result of completing these portfolios the initial members have been able to use them to demonstrate to managers how their roles can support service change by:

- Reducing pressures in consultant outpatient clinics – using ANPs to review patients in clinic or using telephone consultations/letters;
- Taking on traditional medical procedures, making diagnoses and initiating treatment (the portfolio enables the health board to provide vicarious liability insurance);
- Initiating new service models as a result of audits/research – portfolios have enabled the health board to provide vicarious liability and a demonstration of competence to reassure medical colleagues and other health professionals.

It has also led to successful rebranding to a higher band of roles in some instances and protection of these jobs for future nurses.

We would recommend all ANPs consider producing a portfolio to support their roles in this way; they can also be used to support revalidation.

References

For more on this topic go online...
- Understanding advanced nursing practice
- Bit.ly/NTAdvancedPractice

### TABLE 1. EXAMPLES OF EVIDENCE FOR ENDOCOPY ADVANCE NURSING PRACTICE

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<td>Critical thinking and analytical skills</td>
<td>Endoscopy and outpatient reports Technical reflection: the introduction of a nurse-led flexible sigmoidoscopy service Reflective review: improving patient involvement and cost effectiveness within an inflammatory bowel disease service ANP summary and analysis of services annual report</td>
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<td>Managing complexity</td>
<td>Endoscopy and outpatient reports ANP summary and analysis of services annual report</td>
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<td>Assessment, diagnosis, referral, discharge</td>
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do not routinely participate in recorded case-based discussions unless working at specific levels and completing these alongside medical colleagues.

It was interesting to note how creative the group became in finding evidence relevant to the pillars: those who did not routinely use protocols or pathways often used reflective evidence based on an intervention or annotations from patient notes. All practitioners gained a sense of their own roles and the complexity of them; they also felt more comfortable that the health board was aware of their roles and able to fully support them from a governance perspective once the portfolio was accredited.

ANPs have seen a number of benefits to producing a portfolio, including a clear articulation of roles to non-clinical staff, regulation and protection of the public through clinical governance, ensuring vicarious liability and a demonstration of competence to reassure medical colleagues and other health professionals.

Innovation

Conclusion

This process has been extremely challenging for all involved but particularly the original nurses because the “goal posts” shifted significantly throughout the process as alternative evidence and structures were repeatedly proposed.

The main difficulties for all practitioners concerned what evidence to include and what constituted advanced practice. Nurses are not generally encouraged to keep copies of complex cases indicating decision-making and judgement skills, and