



Rancho Los Amigos National Rehabilitation Center

DEPARTMENT OF NURSING

ADMINISTRATIVE

POLICY AND PROCEDURE

SUBJECT: CLINICAL COACH

Policy No.: A525
Effective Date: 07/1999
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PURPOSE: To provide criteria for clinical coach selection; identify the responsibilities of the clinical coach, orientee, Nurse Educator, and Nurse Manager; and to describe scheduling, patient assignment and clinical coach recognition.

DEFINITIONS:

- I. Clinical Coach: A clinical coach is an RN who functions as a teacher and mentor in guiding, directing, and supervising the attainment of knowledge, skills and attitudes of the newly hired or transferred employee (orientee) within the limits of nursing policies and procedures.
Key Point: When a clinical coach is transferred within Rancho or voluntarily moved from one unit/service to another, the new nurse manager determines when the clinical coach is ready to coach on the new unit/area. The clinical coach should be working in the new unit/area for a minimum of one year.
- II. Orientee: An orientee is a newly hired or transferred nurse whose clinical expertise may range from that of a novice to that of an advanced beginner.

POLICY STATEMENTS:

- I. Clinical coach support and orientation is individualized to meet the orientee's needs.
- II. Each unit clinical coach is selected based on the clinical coach selection tool completed by the Nurse Manager/SSN, peer and clinical coach candidate (see attachment A).
- III. All clinical coaches are required to attend the Clinical Coach Program.
- IV. Each clinical coach is responsible to perform the following functions:
 - A. Identify own learning needs and resources available to meet them.
 - B. In collaboration with the orientee and Nurse Educator assess:
 1. The orientee's past experience to determine their learning needs.
 2. The orientee's learning style.
 - C. Review unit's orientation plan with Nurse Manager and Nurse Educator.
 - D. Develop goals, objectives, and timelines utilizing the orientation checklists in collaboration with the orientee, Nurse Manager, and Nurse Educator.
 - E. Teach specific orientation content.
 - F. Share a patient assignment by progressively delegating patient care responsibilities to the orientee based on educational goals and objectives.
 - G. Demonstrate adherence to all policies and procedures.
 - H. Assist the orientee in organizing and prioritizing daily patient care routines.
 - I. Provide ongoing feedback to the orientee either in writing or a verbal report. In addition, address the orientee's progress in completing the established goals and objectives. Share this information with the Nurse Manager on a weekly basis or more frequently as needed.
 - J. Collaborate with the Nurse Manager, Nurse Educator, and other resource people (as necessary) to address any training issues and to facilitate the completion of the orientation checklist(s).
 - K. Provide the Nurse Manager with input into the orientee's evaluation.
 - L. Collaborate with the Nurse Manager to select an alternative clinical coach resource for absences.
 - M. Assesses the competency of the orientee to meet role expectations.
- V. The Orientee is responsible to:

- A. Work with the clinical coach to develop personal learning goals, objectives, and timelines using the orientation checklists as guidelines.
 - B. Confer daily with the clinical coach for mutual evaluation of daily patient care activities including keeping orientation materials accessible at all times.
 - C. Accept accountability for nursing judgment and patient care.
 - D. Ask for resource assistance as needed.
 - E. Share a patient care assignment and progressively assume clinical patient care responsibility and full workload.
 - F. Use resource personnel including the clinical coach, SSN, Nurse Manager, and Nurse Educator appropriately.
 - G. Assure completion of orientation checklist(s) within the established timeframe.
 - H. Evaluate personal performance, overall orientation, and clinical coach as requested.
- VI. The Nurse Educator is responsible to:
- A. Work with unit staff through the collaborative management process to keep unit-specific orientation checklist and unit cross-training information updated and accurate within established priorities and timelines.
 - B. Work with Nurse Manager to develop the standardized orientation plan for the unit.
 - C. Work with Nurse Manager/SSN to plan customized orientation for new staff based on the new employee's skills and experience.
 - D. Establish lesson plans and teach specific orientation content.
 - E. Assist with classroom orientation of orientee.
 - F. Provide input into orientee's performance evaluation as appropriate.
 - G. Assists with clinical coach development.
 - H. Serves as a resource to orientee, clinical coach, SSN, and Nurse Manager to meet learning needs of the new employee or clinical coach.
- VII. The Nurse Manager is responsible to:
- A. Assume responsibility for planning unit-based orientation based on scope of care.
 - B. Work with unit staff and Nurse Educator through the collaborative management process to keep unit-specific orientation checklist and unit cross-training information updated and accurate within established priorities and timelines.
 - C. Work with Nurse Educator to develop the standardized orientation plan for the unit.
 - D. Choose nurses to function as unit clinical coaches based on selection criteria, see attachment (A).
 - E. Provide the orientee with unit-specific information including personnel policies.
 - F. Schedule the orientee to work:
 - 1. The same schedule as the clinical coach.
 - 2. An appropriate period of time on day shift before transition to other shifts.
 - G. Meet regularly with new employee and/or clinical coach to validate that the orientation plan is being carried out successfully.
 - H. Teach specific orientation content.
 - I. Provide new employee with oral/written feedback at appropriate intervals.
 - J. Establish the personal/area file for employee.
 - K. Collaborate with the Nurse Educator to provide orientation materials to employee including orientation checklist(s) and required paperwork.
 - L. Ensure all aspects of the orientation are completed.
 - M. Provide a report to Clinical Director on a regular basis regarding orientee's progress.
 - N. Evaluate the orientee with input from the clinical coach, coworkers, educators, and other leadership personnel.
 - O. Evaluate the clinical coach on their coaching activities/responsibilities as a part of the annual performance evaluation.
 - P. Provide unit recognition for clinical coaches as a part of routine recognition activities.
 - Q. At the end of orientation, review education folder to ensure all required documents are completed per requirements and filed appropriately.**
- VIII. The following parameters will be used to determine the orientee's schedule:

- A. Following central orientation classes, the orientee may be assigned to work the same schedule as the clinical coach.
- B. The orientee is not included in unit staffing requirements until generic competencies are completed, depending on the classification of the employee.
- C. Additional orientation time with a clinical coach is scheduled at the discretion of the Nurse Manager/Clinical Nursing Director and is based on employee's performance and ongoing learning needs.
- D. Generally, the clinical coach and orientee do not "float" to other units during the orientation period. If "floating" of the clinical coach is required, then the RN orientee will "float" with the clinical coach to the new patient care area and participate in care delivery in that area. LVNs and/or unlicensed nursing staff on orientation do not float with the Clinical Coach. Instead a designated RN will oversee their orientation.

IX. Patient Assignment

- A. Patient assignment is the responsibility of the Nurse Manager, SSN, and/or designee.
- B. The clinical coach collaborates with the Nurse Manager, SSN, and/or designee to select the orientee's patient assignment.
- C. The clinical coach and Nurse Manager determine an appropriate assignment for the clinical coach during the clinical orientation period based on the learning needs of the orientee, the orientee's previous experience level, the amount of time the orientee is scheduled to be on the unit, and the achievement of goals by the orientee.

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References:

DHS-wide specialty unit training program policy 701.4

Loughran, M.C & Koharchik, L (2019). Ensuring a successful preceptorship: Tips for nursing preceptors. *American Journal of Nursing*, 119(5), 61-65.

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Powers, K, Herron, E & Pagel, J. (2019). Nurse preceptor role in new graduate nurses' transition to practice. *Dimension of Critical Care Nursing*, 38(3), 131-136.

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CLINICAL COACH, PEER and SELF EVALUATION TOOL

Candidate's Name/Classification: _____

Unit: _____

Date: ____ / ____ / ____

Nurse Manager: _____

Form completed by:

Directions:

Nurse Manager/SSN

Candidate

Peer

1. Candidates must meet 6 out of 8 of the criteria

2. Three evaluations tools need to be completed by: Clinical Coach Candidate, Nurse Manager/SSN, and Peer

Criteria #	Criteria	Met	Not Met	Comments/Goals
1	Minimum 1 year of experience in current area of specialty (Mandatory)			
2	Exemplar of professional behavior, including appearance, attendance, and attitude (Mandatory)			
3	Demonstrates strong organizational skills with an ability to prioritize patient care			
4	Displays enthusiasm and desire to teach, lead, and guide newly hired staff			
5	Supports the nursing department mission, vision, and values, including active participation/collaboration in any of the following: UPIC, Nursing Department councils/committees/projects, and interdisciplinary team activities			
6	Demonstrates effective teaching skills that include the identification, development, and implementation of the plan of care			
7	Exhibits effective communication ability and aptitude, including accurate hand-off communication, clear/appropriate patient education, and ability to provide feedback in a constructive manner			
8	Uses effective skills to assist others in the socialization of the culture of Rancho Los Amigos National Rehabilitation Center			

Nurse Manager/ SSN I Signature: _____

Employee Signature: _____

Peer Signature: _____

GUIDELINES FOR UTILIZING CLINICAL COACH TOOL

- This tool was created as a guideline for selection of new clinical coaches.
- Three clinical coach evaluations are to be completed by the following: Nurse Manager/SSN, *Peer Candidate.
*Peer Evaluation includes the candidate's peer who has similar background (ex. educational level, works the same shift or has a similar experience as a nurse in the area of specialty).
- There should be collaboration with the Nurse Manager/SSN, Nurse Educator, and candidate to select the peer.
- The candidates should meet 6 out of the 8 criteria
- Criteria 1 and 2 are mandatory
- It is the expectation that a RN2 and RN3 fulfill the clinical coach role which is within their job description
- If the candidate does not meet 6 out of the 8 criteria please set goals and leave comments so the candidate is aware of the expectation for that specific criteria
 - The candidate can later be re-evaluated once they meet their goal(s)/comment
- Complete, sign, and submit completed form(s) to your unit Nurse Manager. Nurse Managers will submit all completed tools to Clinical Coach Coordinator.