

## EP15

**Nurses at all levels engage in periodic formal performance reviews that include a self-appraisal and peer feedback process for assurance of competence and continuous professional development.**

Provide one example with supporting evidence of clinical nurses using periodic formal performance review that includes a self-appraisal and peer feedback process to enhance competence or professional development.

Provide one example with supporting evidence of nurse leader using periodic formal performance review that includes a self-appraisal and peer feedback process to enhance competence or professional development.

### Example #1

**Clinical Nurse: Melissa Jameson, AD, RN, CN II**

SJO conducts annual performance evaluations for all nurses and utilizes a peer and self-evaluation process to promote professional growth and development. Established processes are in place to facilitate the exchange of rich feedback.

The combination of peer input, self-evaluation and supervisor appraisal provides a powerful overview of information to assist with goal setting and career development. It also provides another opportunity for recognition.

#### Performance review

Performance reviews are conducted annually. The performance review process begins with a discussion between the clinical coordinator or nurse manager and the staff nurse for the purpose of clarifying performance expectations and establishing goals.

The basic standards and competencies apply to all staff nurses. The performance criteria at each level incorporate an expectation of incremental increase in demonstrated skill sets. With the four levels of the clinical ladder as the foundation, our nursing staff performance review process is goal-oriented and linked to the professional standards of practice and career development.

The performance appraisal is divided into two key areas: “What you do” and “How you do it.” In each case, the values-based, essential-function competencies of the nurse are rated reflecting a distinct difference between the care provided and the manner in which it was provided.

- What you do: essential job functions, job-specific competencies, special projects and assignments
- How you do it: values-based competencies

[EP15.1.1 2014 Performance Evaluation – Melissa](#)

### Self-appraisal

All nurses are asked to complete a self-appraisal, which is a reflection of their performance perceptions related to goals, individual and unit activities, council participation, projects and their job description standards of practice.

The process of self-evaluation assists the clinical coordinator or nurse manager to better understand where the employee feels their strengths and areas of improvement lie. As the manager evaluates the nurse, any discrepancies between what the manager sees and where the employee feels they are performing provides an opportunity for discussion regarding the employee's competence and professional development.

### [EP15.1.2 2014 Self Review - Melissa](#)

### Peer feedback

The peer feedback process is utilized to obtain input into individual performance. The clinical coordinator or nurse manager initiates the peer review process. The nurse being evaluated provides the names of two nurses who they personally select. In addition, the clinical coordinator and nurse manager also select two nurses. When providing peer review, the nurse incorporates the following components into the assessment:

- Observation - the evaluator observes demonstrated skills, provision of safe and therapeutic care and a commitment toward customer satisfaction and patient advocacy.
- Effective listening - demonstration of effective communication with members of the healthcare team.
- Documentation review - documentation is complete and reflects patient care provided.

A date for completion and return of input is mutually agreed upon. The feedback received helps to establish a comprehensive, well-rounded picture of individual competence and performance. The peer review process for staff nurses occurs on an annual basis to correlate with the common review date established for performance evaluation.

### [EP15.1.3 2014 Peer Input #1- Melissa](#)

### [EP15.1.4 2014 Peer Input #2 - Melissa](#)

### **Clinical nurse: professional development**

The described process is utilized on an annual basis to ensure competence and continuous professional development. The Orthopedic unit has several long-term employees with greater than 20 years of service. Many of these clinical nurses are Associate Degree prepared. Darlene Warren, MSN, RN, CEN, Nurse Manger, realized that to help achieve the organizational goal of 80% BSN by January 2020, she needed to incorporate this professional development goal into employee goals. As a nurse manager who had recently graduated with an MSN, Darlene developed a communication plan that included work-life balance, school work and financial plans.

Darlene's communication methods included one to one meetings, Power Minutes, posters and literature from local schools. During clinical nurses evaluation they were told of the department goal and how returning to school is an opportunity for their professional development, which is supported by SJO. Clinical nurses were provided with the SJO developed Back to School BSN/MSN resource book. Additionally, the department posted a list of staff members who were currently in school or had recently graduated so that interested staff could seek answers.

Melissa Jameson, AD, RN, is one example that illustrates Darlene's success. Melissa began at SJO 10 years ago as a nurse assistant. Upon graduating from Cypress Community College with her Associates Degree in Nursing, Melissa began working as a CN I on the Orthopedic unit. In January 2014 Melissa enrolled in Vanguard University's BSN program and will complete her BSN in December 2015.

### [EP15.1.5 Enrollment in Vanguard University](#)

Melissa's self-review indicates that she is working toward her professional development goal of obtaining her BSN. Peer input reflects Melissa's development opportunity to complete her BSN, and her clinical coordinator and nurse manager acknowledge her educational efforts toward enhancing her competence and professional development. Melissa recognizes that her competence and skills in conducting physical assessments have been enhanced as a result of returning to school and completing a physical assessment class. Melissa has recently assumed the role of the Unit-Based Council chair and acts as a relief charge nurse when needed.

### **Example #2**

#### **Nurse Leader: Carmen Ferrell MSN, RN, CCRN, Executive Director Nursing Operations and Clinical Outcomes**

A similar process has been designed for nurse leaders that reflects the leader's strengths and opportunities for professional development.

#### Performance evaluation

The performance appraisal process is similar for all nurses in the organization. The performance evaluation tool defines the essential functions of the role. For each nursing director, specific goals are individualized to ensure continued competence and professional development to meet the Division of Nursing's goals.

### [EP15.2.1 2014 Performance Evaluation - Carmen](#)

#### Self-appraisal

Each nursing director completes a self-evaluation that incorporates their department-specific accomplishments and goals during the past year. Also included is the self-evaluation of completed or in-process projects or special assignments.

[EP15.2.2 2014 Self-Appraisal – Carmen](#)

Peer feedback

CNO Katie Skelton seeks peer feedback from multiple sources across the organization. The nurse director selects two peers and Katie selects an additional two. The feedback from peer reviews becomes part of the discussion as strengths and/or opportunities for professional development are noted.

[EP15.2.3 2014 Peer Input #1 - Carmen](#)

[EP15.2.4 2014 Peer Input #2 - Carmen](#)

[EP15.2.5 2014 Peer Input #3 - Carmen](#)

**Nurse leader: enhance competence**

As Executive Director of Nursing Operations and Clinical Outcomes, Carmen was the clinical informatics liaison between St. Joseph Health and SJO during the Meditech implementation and standardization project. Carmen's leadership facilitated a smooth transition through the implementation process.

Carmen assumed leadership responsibility for the Meditech project in 2012, at a time when a seasoned and thoughtful leader was needed. Carmen's 2014 performance evaluation goals outline her leadership role in the project. To ensure success of Meditech standardization, Carmen had to create a high functioning, stable team. To accomplish this she needed to evaluate her individual team members for talent, and provide leadership, structure and stability. She also needed to guide SJO to achieve a successful go-live of the Meditech project. Another goal was to assist nursing units with standardization of their staffing matrix and budget practices. These goals served as the framework to guide Carmen's performance and priorities.

Peer feedback recognized Carmen's leadership abilities and skills during the Meditech implementation. Her collaboration with peers to understand the issues and her work toward resolution are strong confirmations of her competence.

In her 2014 self-evaluation, Carmen noted the challenges of both projects. The Meditech project included many moving parts and stakeholder groups that she had to communicate with and receive consensus from to move the organization in one direction. In working with nursing units on standardizing the staffing matrix and budget process, Carmen needed to be a teacher and mentor. She acknowledges that FY14 was the most challenging of her career, but the experiences provided personal and professional growth and expansion.

Carmen's 2014 performance evaluation recognized her contributions to both projects and their success under her leadership, which demonstrates a calm, controlled demeanor. She is acknowledged as an excellent mentor, teacher and developer of people.

The annual performance evaluation process provides a rich opportunity for self-reflection with colleagues on professional nursing practice and performance. The self-appraisal and peer feedback processes provides nurses a broader perspective on their professional effectiveness. The feedback is used constructively by creating recognition and celebration along with an opportunity for individual development planning. This supportive process enables SJO to grow and contribute to nursing practice.

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