Professional Nursing Staff Organization

Operational Guideline # 09:
Peer Review and Self-Evaluation

Purpose

The primary purpose of peer review is to help ensure the quality of nursing care through safe deliverance of standards of care and evidence-based practices. PNSO members hold a professional responsibility to self and to colleagues to evaluate and continuously improve their individual and collective clinical practice. In part, this is accomplished via regular self-appraisal and peer review activities.

PNSO Bylaws call for the Professional Development of members through peer review opportunities (Article 2, #3) and state that peer review is a right and responsibility of all PNSO members (Article 3, Section 2, #2). The ANA Code of Ethics calls nurses to preserve integrity and safety, to maintain competence of self and others. One of the tenets of Relationship-Based Care is caring for self and colleagues. Peer Review provides the opportunity to encourage and support professional development of ourselves and colleagues.

Principles

The following shall be conducted at least annually as part of the formal performance evaluation process by each health system RN:
- Written self-evaluation
- Written peer review with face to face review

Additional episodes of formal peer review throughout the year are recommended, with frequency determined by the local shared governance committee.

Candidates for advancement or revalidation on the clinical ladder will provide evidence of self-evaluation and solicited peer reviews as required in the Clinical Career Ladder Manual.

Each RN is expected to provide peer feedback during care delivery and during hand-off of care to promote adherence to professional practice standards.

When required, each RN is expected to participate in nursing quality case reviews that may be conducted as follow up to events deviating from current nursing standards (QR and HAC reviews)

Processes

Annual Evaluations

Assignment of a formal peer review for performance evaluation will be determined by unit manager. This will include both a written review and a face-to-face presentation of the written review.

Annual *Self-Appraisal* and assigned *Colleague Input Performance Appraisal* are submitted to manager for each RN using the electronic performance management system tool. The reviewer should have a face-to-face meeting with the individual being reviewed before submitting their feedback. For face-to-face peer review, the RN reviewer will print a copy of completed electronic *Colleague Input Performance Appraisal*, and then

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discuss it in person with their nurse colleague. Peer Review MUST include discussion of growth areas, as well as strengths.

- Clinician IIIs and IVs: Face-to-face peer review utilizing the tool titled "*Peer Review Form for Performance Review, CN3 Role*" shall be conducted at least annually. (This form is available on the PNSO website at http://www.healthsystem.virginia.edu/pub/pnso/intranet/peerreview/rev05_27_10_clinician_3_peer_review.doc.)
- Local shared governance committees shall determine if this expectation is in addition to or in place of submitting the *Colleague Input Performance Appraisal* noted above.

Career Ladder
Self-evaluation and peer review for advancement are completed according to standards published in the Clinical Career Ladder Manual. This does not require a form; self and peer reviews are submitted in letter format.
http://www.healthsystem.virginia.edu/pub/pnso/intranet/careerladder/CareerLadderHandbook/CCLHandbook

In-the-Moment Peer Review
Every RN is encouraged to seek peer feedback from colleagues, and to provide peer feedback in daily clinical settings. At a minimum, this should be happening at each hand-off of care. If an RN does not feel comfortable providing in-the-moment peer review, they have a professional obligation to identify a mentor or to seek educational opportunities to strengthen this skill.

Some local shared governance committees may choose to make this a more formal process, and to include data from clinical interactions in the formal annual evaluation. There is a sample tool for recording in-the-moment feedback on the PNSO website; this tool may be modified to fit the requirements of each clinical setting.
http://www.healthsystem.virginia.edu/pub/pnso/intranet/peerreview/ClinicalPeerReview_CustomizableTemplate.docx/view

Peer Case Review
There may be occasions when nursing practice has not met current standards of care, and a potential or actual negative outcome has occurred. Nurse clinicians will be expected to participate in a case review to provide feedback to colleagues regarding patient care. These case reviews may be requested by local shared governance Quality or Practice committees, or may be requested as a result of QR or dashboard outcomes.

Resources:[1]

- Peer Review CBL on NetLearning (in development)

- Preceptor Essentials and Preceptor Booster classes available through Nursing Education Services, register on NetLearning. Both offer instruction on providing in-the-moment feedback and creating a culture of peer review.

- Articles:
  - Haag-Heitman, B. and George, V. (Sept. 2011) "Nursing Peer Review: Principles and Practice." *American Nurse Today,* 2011 Sept;6(9):48-53. Retrieved from
    http://www.americannursetoday.com/article.aspx?id=8244&fid=8172

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[1] "Resources" section may be amended/updated as needed without Cabinet approval.

Exhibit OO10.h
- Diaz, L. (2008) "Nursing Peer Review: Developing a Framework for Patient Safety." *The Journal of Nursing Administration,* 2008 Nov;38(11):475-9. Retrieved from
  http://www.ncbi.nlm.nih.gov/pubmed/18997552

- Pfeiffer, J. et al. (2012) "Assessing RN-to-RN Peer Review on Clinical Units." *Journal of Nursing Management,* 2012 Apr;20(3):390-400. Retrieved from http://www.ncbi.nlm.nih.gov/pubmed/22519617

- Branowicki, P. et al. (2011) "Exemplary Professional Practice Through Nurse Peer Review." *Journal of Pediatric Nursing,* 2011 Apr;26(2):128-36. Retrieved from
  http://www.ncbi.nlm.nih.gov/pubmed/21419972

- Wood, D. (2009) *Peer Review Offers Opportunities to Improve Nursing Care.* Retrieved from
  http://www.nursezone.com/nursing-news-events/more-features/Peer-Review-Offers-Opportunities-to-Improve-Nursing-Care_29908.aspx
  [AMN Healthcare, Inc.]

- Haag-Heitman, B. and George, V. (2011). *Peer Review in Nursing: Principals for Successful Practice.* Retrieved from http://www.r2library.com/resource/title/0763790400 (E-book available through Claude Moore HS Library)

- American Nurses Association (1988). *Peer Review Guidelines*, ANA Publ. 1988 Jan;(NP-73):i-iv, 1-14

- The Advisory Board resources (UVA Health System is a member, so materials are available at no cost to HS staff. You must create account and log in to access):
  http://www.advisory.com/Research/Nursing-Executive-Center/Studies/2011/Building-Peer-Accountability

- Peer Review resources on PNSO website:
  - http://www.healthsystem.virginia.edu/pub/pnso/professional-development/peerreview.html
  - http://www.healthsystem.virginia.edu/pub/nursingeducationservices/preceptors

- CE Direct (as of their Spring 2013 course catalog):
  Peer Review in Nursing, an Evidence-Based Approach
  The Difference between Comprehensive Peer Review and Peer Evaluation
  https://lms.nurse.com/Aspx/SearchCourse.aspx