Development of an Innovative and Transparent Peer-to-Peer Process

2015 ANCC National Magnet Conference:
Session C816
October 8, 2015  11:15 am – 12:15 pm

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Arlington, TX

Section I

Conference Objective

Incorporate best practices to achieve positive patient outcomes by integrating science-based research
- THR Nursing Excellence
  - Magnet® Designation at:
    - Texas Health Arlington Memorial
    - Texas Health Dallas
    - Texas Health Fort Worth
    - Texas Health Plano
  - Pathway to Excellence® at:
    - Texas Health Allen
    - Texas Health Alliance
    - Texas Health Axtle
    - Texas Health Cleburne
    - Texas Health Denton
    - Texas Health Southwest (on Magnet journey)
    - Texas Health Specialty Hospital
    - Texas Health Stephenville

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- Nursing Professional Practice Model

- Entity Nursing Council Structure
  - Nurse Executive Team
  - Nursing Operations Council
  - Nursing Congress
  - Clinical Nurse Leader Council
  - Nurse Educator Council
  - Central Supply and Materials Management Council
  - Finance Council
  - Human Resources Council
  - Physician Executive Council
  - Patient and Family Council
  - Quality Council
  - Risk Management Council
  - Employee Development Council
  - Infection Control Council
  - Patient Safety Council
  - Performance Improvement Council
  - Patient Satisfaction Council

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Via Shared Governance Ideas or Processes Can Go System-wide

- 2013 Nursing Congress Delegate Meeting Discussion
  - Agenda item for Nursing Congress Open Forum Discussion
  - Nursing Congress Approval
  - Standardize the Peer Review Process for THR Clinical Nurses

- Meanwhile, TH Arlington Memorial created a peer review form guided by the new Professional Practice Model and 2 other hospitals began using the same/similar form/process.

- 2014 Nursing Strategic Plan and Nursing Vision to "becoming our nursing service with exceptional professional practice that leads to clinical excellence and quality." A strategic goal to create a process standardized for all 14 wholly-owned hospitals

- So the Task Group was formed

Professional Practice and Peer Review Task Group and Meeting Dates

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Department</th>
<th>Meeting Dates</th>
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<tbody>
<tr>
<td>Gerianne Holley, RN</td>
<td>THAM Clinical RN</td>
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<td>March 31, 2014</td>
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<tr>
<td>Melissa Wallace, RN</td>
<td>THA Clinical RN</td>
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<td>April 29, 2014</td>
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<tr>
<td>Todd Hobbs, RN</td>
<td>THAL Clinical RN</td>
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<td>May 29, 2014</td>
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<td>Jamie Ball, RN</td>
<td>THAZ Clinical RN</td>
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<td>June 9, 2014</td>
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<td>Schantile McCray, RN</td>
<td>THC Clinical Charge RN</td>
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<td>July 21, 2014</td>
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<tr>
<td>Munera Nawaz, RN</td>
<td>CSO Clinical RN</td>
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<td>September 2, 2014</td>
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<tr>
<td>Amanda Dalto, RN</td>
<td>THD Clinical RN</td>
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<td>October 3, 2014</td>
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<tr>
<td>Dana Kennedy, RN</td>
<td>THDN Nurse Navigator - ED</td>
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<td>Jennifer Bruce, RN</td>
<td>THFW Clinical RN</td>
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<td>Nick Ortner, RN</td>
<td>THHEB Clinical RN, Supervisor</td>
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<td>Tange Anderson, RN</td>
<td>THK Clinical RN</td>
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<td>Sam Keohavong, RN</td>
<td>THP Clinical RN, Supervisor</td>
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<tr>
<td>Leslie Peloquin, RN</td>
<td>THSW Clinical RN</td>
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<td>Crystal Schramm, RN</td>
<td>THSH Clinical RN</td>
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<tr>
<td>Joell Tadlock, RN</td>
<td>THS Clinical RN</td>
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Scope of Task Force’s Work

- Not Included:
  - Texas Board of Nursing Peer Review is an important type of peer review and no changes to that process were needed

- Review or development of process for managers
Section II

What is Peer Review?

What does Peer2Peer mean to my practice as a Direct Care RN?
• Video for Slide 11

ANA Definition

1) ANA definition:
   – An organized effort whereby professionals review the quality and appropriateness of services ordered or performed by their professional peers.
2) ANA definition:
   – “the process by which nurses systematically access, monitor, and make judgments about the quality of nursing care provided by their peers as measured against professional standards of practice.”

   Source: “Peer Review in Nursing: Principles for Successful Practice” by Barbara Haag-Heitman and Vicki George

The Many Faces of Peer Review

- **Formal**
  - Shared Governance Councils / Unit Based Council
  - Review of Nurse-sensitive outcomes
  - Review of HCAHPS survey results
  - Review of audits of compliance with new processes or documentation
  - Nursing Career Ladder
  - TX Board of Nursing Incident-based Reports
  - TX Board of Nursing Safe Harbor Reports
  - Annual Peer to Peer (Task Force’s Work)

- **Informal**
  - Bedside Report
  - Daily Teamwork
  - Briefs or Huddles
  - Team Meetings
  - Nurses do peer review often
    - Collaboration on best practice/standards
    - Collaboration on a patient’s plan of care
ANA’s 6 Elements of Peer Review

1) A peer is someone of the same rank
2) Peer review is practice-focused
3) Feedback is timely, routine, and a continuous expectation
4) Peer review fosters a continuous learning culture of patient safety and best practice
5) Feedback is NOT anonymous
6) Feedback incorporates the nurse’s developmental stage

Outcomes of Professional Practice and Peer Review

1) Role Actualization
   – Advancing a nurse as an individual
   – Performing at the top of his or her license
2) Quality and Safety
   – Evaluate quality of nursing care and quality of nursing care provider
3) Practice Advancement
   – Advancing nursing as a profession
   – Autonomy and accountability

Section III
The Professional Practice and Peer Review
Design, Process, and Tools
Scope of Task Force’s Work

- Included:
  - Develop a conceptual framework
  - Develop a standardized process for clinical nurses
  - Develop a process to support a clinical nurses’ self-appraisal
    - Nurse uses that feedback to identify strengths, professional growth opportunities, and goals
    - Nurse can incorporate feedback in annual performance review
  - Avoid “pal eval”
    - feedback that affects co-worker’s compensation
  - Create a process owned by clinical nurses

Ineffective Peer Review Feedback

- Video for Slide 20

Review of Professional Standards and Evidence

- ANA Peer Review Guidelines published in 1988
- ANA Code of Ethics:
  - Provision 3 Patient Advocacy: Maintain competency to protect patients
  - Provision 4 Accountability and Responsibility: Accountable for actions
  - Provision 5 Duty to Self and Others: Integrity to disclose practice issues
  - Provision 7 Advancement of the Profession
- ANA Scope and Standards
  - Standard 8 Attain Knowledge and Maintain Competency
  - Standard 14 Professional Practice Evaluation
- Magnet Standard EP 15:
  - Clinical nurses use periodic formal performance review that includes a self-appraisal and peer feedback process to enhance competence and professional development
The Team Members are Conceptualizing!!!
“Peer2Peer” Feedback Process

• Reviewer is of same rank or peer to peer
• Feedback goes directly and confidentially to the nurse being reviewed
• Nurse reviews completed peer review document
• Nurse seeks verbal, direct, open, and honest feedback
• Each nurse has opportunity to seek out a coach to help interpret feedback and assist in goal setting
• Nurse establishes goals to bring to annual review with manager

THR “Peer2Peer” Feedback

• “Peer2Peer” Feedback
  – Based on THR Nursing Professional Practice Model:
    • Teamwork
    • Professional Development
    • Shared Decision Making
    • Quality Caring Model
  – Process
    • Learning Management System Integrated Forms
    • Two peers: one chosen by the nurse, one selected by manager

Initial Tool for Annual Peer Feedback

• “Peer2Peer” (P2P) Feedback Form
  – Process
    • Clinical nurses will select one peer to complete a peer review assessment.
    • The manager will select one nurse for each clinical nurse.
    • The Learning Management System prohibits a single nurse from assignment to more than three assessments, while integration with email allows communication of assigned and completed reviews.
    • Includes all RNs reporting to nursing operations who are in non-management positions.
“Peer2Peer” Feedback Form

<table>
<thead>
<tr>
<th>TEAMWORK</th>
<th>Rarely</th>
<th>Sometimes</th>
<th>Usually</th>
<th>Almost Always</th>
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<tbody>
<tr>
<td>Leads by example.</td>
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<tr>
<td>Is a team player and works collaboratively with others.</td>
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<td>Helps and takes the initiative when needed.</td>
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Comments: ______________________________________
_________________________________________________
_________________________________________________
_________________________________________________

Self-Identified Areas:
The following items are some opportunities for improvement that I have noted in my practice. Please help evaluate how I am doing with these things and any suggestions to better myself are appreciated.
1) ______________________________________________________________________________________
2) ______________________________________________________________________________________
3) ______________________________________________________________________________________

Comments: _____________________________________________________________________________
_________________________________________________
_________________________________________________
_________________________________________________

Career Track Recommendations for Clinical Nurses in staff nurse roles
(ONLY):
Regarding the career tracks included in “My Nursing Journey” which one would you recommend I pursue? Please give a brief reason:
Clinical
Informatics
Education
Leadership

Summary and Goals Tool
for Annual Peer Feedback

• “Peer2Peer” Summary and Goal Development Form
  – Nurse reviews the peer feedback provided on the two P2P Review tools received
  – Seeks additional information or clarification if needed from peers
  – Uses the information from the forms and discussions with peers to summarize their strengths, opportunities and goals.
“Peer2Peer” Summary and Goal Development Tool

TEAMS

What areas am I successful in:

What areas do I want to improve:

What do I need more information about:

“Peer2Peer” Summary and Goal Development Tool

Goal Development:
Goals should be SMART: Specific, Measurable, Attainable, Relevant, Timely

Goal 1:

Goal 2:

Manager’s Role

- Know and support the process.
- Assure all nurses are involved.
- Make assignment of one peer for each nurse.
- As requested, coach or identify a coach:
  - To develop or improve skills for how to provide constructive peer feedback.
  - To help nurses process the information from peer review.
Section IV

Education and Training: Process and Challenges

Education/Training

- Team recognized three significant challenges:
  - 1) Skill development for “Giving and Receiving Feedback”
  - 2) Understanding the why & the how
  - 3) Transitioning from paper to e-process
- Pilots on the Task Force members’ units completed and many lessons learned

Education Toolbox

- Introductory Overview from CNE (2 min video)
- Web based narrated slide presentation
- Job aids for the e-forms
- Handouts: Peer Feedback Process/Timeline & FAQs
- THR Nurse E-Newsletter article
- What does Peer2Peer mean to my practice as a Direct Care RN? (flashcard 4 min video)
- Video on ineffective peer feedback (“pal-eval”, >2 min)
- 3 Videos on effective peer feedback (1.5 – 2 min)
Giving and Receiving Feedback

- Limitation of only training module available internally:
  - Title = “Receiving Feedback and Criticism” (NOT criticism)
  - Content = Sales setting (not clinical)

- Unable to locate professional video training for clinicians
  - Please let us know if you have found this source

- THR training videos on effective peer feedback
  - Note our colleagues are not professional actors, these are real nurses!!!!
  - We think it is “fun” that at the end they are so excited because they FINISHED their perhaps “final cut”
  - We share those with you now

Feedback on Nurse Communication and Preceptor Orientee

- Video for Slide 38

Feedback on Adoption of Evidence-based Practice

- Video for Slide 39
Effective Peer Review Feedback

• Video for Slide 40

Summary

• Shared governance structure allowed a frontline team of nurses to design a nurse led process
• Team:
  – Reviewed the best practice and the literature
  – Developed a conceptual framework for professional practice review that includes all forms of peer review and also peer feedback
  – Designed the forms and process with an electronic solution
  – Piloted the process on their units
  – Developed the educational strategies
• Launched the new process system-wide with involvement of education leaders and team

Journey to Magnet

• EP 15: 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.
• At THR: Nurses participate in a “P2P” feedback process that occurs as a part of and for the nurse’s integration into their self-appraisal and goal development. The nurse then shares their self-appraisal with their manager at the time of their formal performance review.
Discussion and Questions

We would love to learn from you regarding your peer feedback process

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