Choose 3 of the following:

a. Provide one example, with supporting evidence, of the use of periodic formal performance review for the CNO that includes a self-appraisal and peer feedback process, demonstrating a plan for professional development.

b. Provide one example, with supporting evidence, of the use of periodic formal performance review for a AVP/nurse director that includes a self-appraisal and peer feedback process demonstrating a plan for professional development.

c. Provide one example, with supporting evidence, of the use of periodic formal performance review for a nurse manager that includes a self-appraisal and peer feedback process demonstrating a plan for professional development.

d. Provide one example, with supporting evidence, of the use of periodic formal performance review for an advanced practice registered nurse (APRN) that includes a self-appraisal and peer feedback process demonstrating a plan for professional development.

e. Provide one example, with supporting evidence, of the use of periodic formal performance review for a clinical nurse that includes a self-appraisal and peer feedback process demonstrating a plan for professional development.

Example e: Clinical Nurse Kacey Faulkner, BSN, RN, 3E Cardiovascular Intermediate Care (CVIC)

Periodic Formal Performance Review
WakeMed's performance management program is based on the philosophy that periodic performance and competency assessment is critical to employees' success. All evaluations are completed in the electronic performance management system, which also houses position descriptions and performance standards. The online performance management system sends notifications to management when an employee is due for any type of evaluation, which must be completed by the employee's evaluation due date. It is management's responsibility to schedule performance evaluations in a timely manner and ensure they are completed by the due date.

A performance evaluation, annual competency assessment (if applicable) and education record are completed and reviewed with each employee annually. All employees are evaluated by January 31 for the previous fiscal year. Employees may appeal their evaluation by discussing areas of disagreement directly with their supervisor. If a satisfactory resolution is not reached, the employee may follow the Grievance Policy up to the director level. (Evidence EP11e-1, Performance Assessment and Performance-Based Pay Increases Policy)

Clinical Nurse Role
The formal annual performance review for clinical nurses on 3E CVIC is completed each year between October and December. Management and the clinical nurse being reviewed each ask one of the clinical nurse's peers to complete a peer assessment of the nurse. In addition to the peer assessment, clinical nurses are asked to complete an
annual self-appraisal in the performance review system by November 15.

**Self-appraisal and Peer Feedback**

Once the self-appraisal and peer feedback assessment are complete, Summer Groff, MSN, RN, PCCN, 3E CVIC Nurse Manager; Teresa Bowen, BSN, RN, PCCN, 3E CVIC Clinical Supervisor/Educator; and Carly Degrange, BSN, RN, RN-BC, 3E CVIC Clinical Supervisor/Educator, review the assessments of CVIC clinical nurses, complete a management performance appraisal and prepare to begin a plan for professional development with the clinical nurse.

In December 2017, Groff met with 3E Clinical Nurse Kacey Faulkner, BSN, RN to review her performance appraisal, peer feedback and plan for professional development. (Evidence, EP11e-2, Faulkner Self Appraisal and Performance Appraisal) (Evidence, EP11e-3, Faulkner Peer Reviews) The appraisals demonstrated that Faulkner, her peers and the management team believed she was meeting or excelling in all required standards. Faulkner had high scores for her clinical skills and professional practice, and her stated employee goal of functioning in the 3E charge nurse role aligned with her peer recommendation for growth. Faulkner’s other goal, to obtain certification, was supported in the management comments of the annual appraisal.

**Professional Development Plan**

After the management review is completed, Groff, Bowen or Degrange meet with the clinical nurse to discuss the performance review and peer feedback. Together, they then formulate a plan for continued professional development. (Evidence EP11e-4, Faulkner 3E Professional Development Plan)

Faulkner had included in her 2017 annual self-appraisal the goals of completing her certification and functioning in the 3E charge nurse role. (Evidence EP11e-2, Faulkner Self Appraisal and Performance Appraisal) One of Faulkner’s peers had also recommended that she consider training for the charge nurse role for her professional growth.

Faulkner and Groff discussed these goals during her performance appraisal meeting in December 2017, and together they formulated a plan to achieve these in the coming year. Faulkner would register for and attend the “Who’s in Charge” class sponsored by Nursing Education, and she would participate in the Success Pays certification program in preparation for obtaining a Cardiac-Vascular Nursing Certification. (Evidence EP11e-5, Faulkner Training Transcript)

Faulkner was oriented to the charge nurse role and was functioning independently in this role 2018. Faulkner also received her Cardiac-Vascular Nursing Certification in June 2018.