

Peer Rounding Guide

Goal

This tool helps you create structured opportunities for staff to assess performance in pairs. You select an outcome and set clear criteria to evaluate performance. Pairs of staff have the opportunity to hold each other accountable for achieving the outcome—improving both teamwork and performance.

Manager Time Commitment

To implement: 90 minutes
To maintain: 15 minutes to review submitted forms

Staff Time Commitment

30 minutes per assessment

How to Use This Tool

1. Identify a group of staff that you want to work with to build a sense of teamwork and mutual accountability.

Peer rounding works well with both clinical and nonclinical staff.

You might choose to implement peer rounding with your whole team, or with a smaller group of staff, such as newer, less experienced staff.

2. Identify an outcome that this group of staff is accountable for.

Examples:

- ☐ **Nursing Assistants:** room cleanliness
- ☐ **Nurses:** pressure ulcer staging score
- ☐ **Call Center Staff:** quality customer service on calls
- ☐ **Billing Staff:** thorough documentation

3. Identify an opportunity for staff to assess performance on the selected outcome in pairs.

For clinical staff, this opportunity often presents itself during shift transitions—the on-coming and off-going staff members can work together to evaluate the outcome.

Examples:

- **Nursing Assistants:** On-coming and off-going nursing assistants inspect patient rooms together to ensure all tasks were completed during the previous shift.
- **Nurses:** On-coming and off-going nurses assess patient's skin together, and come to a consensus on pressure ulcer staging score.

For nonclinical staff, they may be able to evaluate each other's work on the same shift or review already-completed work.

Examples:

- **Call center staff:** on-duty staff listen to samples of peer's incoming calls and provide feedback on customer service.
- **Billing staff:** on-duty staff audit random sample of each other's claims for documentation completeness and adherence to policies and procedures.

In addition to improving teamwork and accountability, peer rounding can also improve performance on outcomes (such as cleaner rooms, more accurate pressure ulcer staging scores, more consistent call center answers, or more thorough financial documentation in the examples described above).

4. Identify a set of well-defined criteria for staff to use during collaborative assessments of performance, and customize the Peer Rounding Form on page 97.

The clearer the criteria, the more focused the peer discussion will be.

For example, see the Sample Completed Peer Rounding Form on page 98 for on-coming and off-going nursing assistants to use to conduct an assessment of room cleanliness together.

Customize your own Peer Rounding Form to include:

- ☐ Instructions for when the form should be completed
- ☐ The specific criteria to evaluate
- ☐ Line for each staff member to sign and date the form
- ☐ Instructions for where staff should turn in the completed form

5. Decide how to pair staff.

The most logical pairing will depend on your team and the outcome you have selected.

- For clinical staff, it may make sense to pair staff based on patient assignment, or on-going/off-going shifts.
- For nonclinical staff, you may decide to randomly assign pairs, or base pairings on tenure (for example, pairing newer and more experienced staff).

6. Introduce the pair-based assessments to staff at your next staff meeting.

Talking Points:

- ☐ Describe the outcome you selected and how the team is currently performing on that outcome
- ☐ Explain staff will assess this outcome in pairs during select times (for example, during change of shift or during a designated time each month). The goal is to help each other ensure all the necessary steps have been taken to reach the outcome
- ☐ Distribute the Peer Rounding Form you created to each staff member
- ☐ Talk through the specific criteria on the form
- ☐ Tell staff how they will be paired together
- ☐ Tell staff where they can find the forms, and where and when they should turn in the forms
- ☐ Explain that staff will be held jointly responsible to turn in the completed form on time

7. Collect peer rounding forms on a regular basis.

8. Review the forms, and ensure all staff are participating in a thorough and timely manner.

If a staff pair is not completing the assessments, follow up with them either in-person or via email to remind them to complete the forms.