# Sarasota Memorial Hospital
## Nursing Department Policy

**Title:** Performance Based Development System (PBDS)  
**Policy #:** 126.070  
**Effective Date:** 9/09  
**Revised Date:** 12/11  
**Policy Type:**  
**Page:** 1 of 5  
**Job Title of Reviewer:** Director of Education, Professional Development, and Research

### Purpose:
To provide a professional development baseline competency and individualize orientation for nurses entering Sarasota Memorial Health Care System.

### Policy Statement:
PBDS is a developmental program. The program goal is to assess current clinical competence, so that an individualized orientation plan can be developed to assure effective, safe and efficient practice as a nurse.

### Exceptions:
A newly hired nurse is not required to complete the PBDS assessment if an acceptable PBDS assessment was already completed within twelve (12) months and the PBDS assessment was administered by SMHCS or another healthcare organization that employs Performance Management System, Inc. (PMSI) to analyze and rate all assessments.

Unit-based competencies are performed in departments who do not use PBDS such as:  
The Pain Care Center and First Physician's Group nursing staff.

Traveler nurses will not be assigned PBDS. The agency will provide proof of competency prior to assignment.

Nursing management including clinical managers and directors.

### Definitions:

**Competence** - The assessed capacity of a nurse to perform specified job functions. There are three domains of competency:  
Critical thinking, interpersonal communication, and technical skills.

**Competency** - the demonstrated ability of a nurse to apply the three domains of competency at the point of care.
**Performance Based Development System (PBDS)**

**Assessment** - the assessment tool used to validate the competence of the nurse upon hire in the domains of critical thinking and interpersonal communication.

**Performance Management System, Inc. (PMSI)** - The company that developed and owns the PBDS product.

**Preceptor** - an experienced and competent clinician, either LPN or RN, who has been assigned to work with new staff for the purpose of orienting to the hospital/units policies, protocols and routines as well as validate the unit specific competencies, but in a short term relationship/duration.

**Clinical coach** - an experienced and competent clinician, either LPN or RN, who has received formal training in the development of an orientee as guided by the use of the PBDS Assessment. (Refer to the Clinical Coach Program Policy # 126.008 for a complete definition and responsibilities).

**POLICY:**

1. All new hired nurses (RN’s and LPN’s) for acute care, comprehensive rehab, behavioral health and some outpatient settings shall complete a PBDS assessment during the initial orientation process. The results of this assessment will yield a Summary/Development Plan designed to assist in the orientation of the new hire.

2. An internal transfer who has not taken the PBDS assessment may be requested to do so by the hiring Clinical Manager upon completion of orientation on that unit. This would serve to validate orientation to the unit and would not generate the development plan that is part of the orientation.

3. A focused assessment may be requested by a Clinical Manager or Educator for a staff member who has deficiencies in performance at the point of care.

**PROCEDURE**

A. **Full-time and Part-time Staff Nurses; Unit based PRN Nurses, Staff Interventional Nurses.**

1. The Human Resource recruiter and the hiring Clinical Manager shall inform perspective nurse employees about the PBDS assessment requirement prior to hire.

2. The newly hired nurse will attend the PBDS assessment at the time and place indicated.
3. Assessments are rated by PMSI and a Summary/development Plan will be reported to the hiring Clinical Manager and/or Unit Based educator within 5 business days.

4. The Summary/Development Plan includes either an ACCEPTABLE or UNACCEPTABLE rating:
   a) **ACCEPTABLE** rating will be labeled:
      i) Limited but Acceptable
      ii) Meets for stated experience
      iii) Meets Entry (new RN/LPN) / Meets with Expectations
      iv) Exceeds
   b) **UNACCEPTABLE** rating will be labeled:
      i) Limited Ability-Does Not Meet Expectations
      ii) Ability Not consistent with Stated Experience
      iii) Does not Meet for Problem Management
      iv) Inconsistent Ability
      v) Does Not Meet Expectations

5. The PBDS Summary/Development Plan Feedback (with exception of those nurses participating in the New Graduate Residency program):
   a) The Summary/Development Plan and orientation recommendations are communicated to the Clinical Manager and/or Unit Based Educator via e-mail.
   b) The Clinical Manager and/or Unit-Based Educator is asked to share the results with the new hire and then assign the new hire to a clinical coach for the duration of orientation to the unit.
      1) The Summary/Development Plan will be reviewed and any follow-up action will be completed during the feedback session.
      2) The orientee will be given instructions on the completion of the required documentation for bedside competence that will serve to further validate the nurse’s competency at the point of care.
      3) If reassessment is recommended, the orientee will be given an appointment for a unit-specific PBDS reassessment. The purpose of this reassessment is to validate and evaluate the orientation
process of the orientee. It is recommended that reassessment occurs prior to the orientee working in an independent role in the event the reassessment results indicate a need for additional orientation time.

6. PBDS process for those nurses participating in the New Nurse Residency Program:
   a) The Summary/Development Plan and orientation recommendations are communicated to the Clinical Manager and/or Unit-Based Educator via email.
   b) The Clinical Manager and/or Unit-Based Educator are asked to assign a Clinical Coach to assist in the application of the Development Plan generated as part of the results.
   c) Newly licensed nurses will receive their PBDS feedback during the New Nurse Residency Program. The following will occur during the feedback session:
      i) Each newly licensed nurse will receive instructions on the completion of the documentation for bedside competence that will serve to further validate the nurse’s competency at the point of care.
      ii) Those newly licensed nurses who received unacceptable results will be given an appointment for a unit-specific PBDS reassessment. It is recommended that reassessment occur prior to the orientee working in an independent role in the event the reassessment results indicate a need for additional orientation time.

7. The orientee and the Clinical Manager and/or Unit-Based Educator will sign the Summary/Development Plan to indicate the document was reviewed and completed. Signed summary/Development Plans remain on file in the orientee’s department file.

8. All orientation and performance-related documents are maintained in the orientee’s department personnel file, e.g. PBDS documentation of bedside competency, orientation checklists, competency documentation.
REFERENCES:


AUTHOR(S):

Ron Bass, MAEd, BSN, RN-BC, Clinical Nurse Educator
Lisa Baumgardner, RN, MSN, CNS-BC, PCCN, Clinical Manager, Education, Professional Development, and Research

ATTACHMENT(S): None
### APPROVALS:

Signatures indicate approval of the new or reviewed/revised policy

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<td>Jean Lucas</td>
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