AN E-MANUAL FOR INTERIM NURSE MANAGERS

Supporting Role Transition and Professional Growth, First Edition

ACKNOWLEDGEMENTS

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EXECUTIVE SUMMARY

BACKGROUND

Over 50% of nurse leaders plan to leave their roles within the next five years. The increased financial pressures and clinical challenges faced by healthcare systems coupled with the demand to fill vacated leadership positions has resulted in a growing need for interim nurse managers to fill the gaps until permanent replacements can be found.

With an average reported tenure for interim nurse managers (INMs) of up to 10 months, strategies to support INM role transition are lacking; for 22% of INMs report having no preparation for their role. Given the pivotal influence of the nurse manager in driving quality staff and patient outcomes and the potential use of the interim role as a proactive approach to prepare future leaders, the development of resources to support both role transition and professional development in this population of future nurse leaders is critical.

PURPOSE

The purpose of this eManual is to support the role transition and professional development of interim nurse managers (INMs) over a one-year period. In addition, the recommended activities and supporting tools can also strengthen leadership succession planning by enhancing the functioning of this and other leadership roles such as assistant nurse manager, nurse manager, and administrative supervisor.

ORGANIZING FRAMEWORK

Phases of INM Role Transition: This eManual is organized around three phases of interim nurse manager role transition and spans the average tenure of an interim nurse manager of 10 months (range 2-18 months) (Galura et al., 2022).

- Phase 1 – Initial Transition (0-4 months) – characterized by high expectations of staff, and the need for the INM to gain a rapid understanding of unit operations.
- Phase 2 – Reality (5-8 months) – characterized by adjusting to reality, increased responsibilities, and the need to prioritize initiatives.
- Phase 3 – Accommodation (9-12 months) – characterized by solutions/problem solving, bridging the leadership gap, and adjusting to the inability to make sustainable change.

American Organization for Nursing Leadership (AONL) Core Competencies: Integrated into each of the three phases are activities and supporting tools that reflect the AONL Nurse Leader Core Competencies (AONL, 2022). In addition, within each phase, activities are organized into two categories: 1) "Survival Skills", or management activities that are needed to support the INM in meeting immediate role responsibilities, and 2) "Broaden and Build", or activities designed for INMs desiring to expand their leadership competencies.

Contents

Phase 1: SURVIVAL SKILLS *(0-4 Months)*

Objective: Set up for successful transition

ACTIVITIES for Onboarding

GOAL: Understand role expectations

- Role Orientation Priorities
- Review: JD and performance evaluation criteria before meeting with leader, *see Resource Library Phase 1: Interim nurse manager job description and interim nurse manager orientation checklist*
- Discuss role expectation: Meet 1:1 with leader come prepared with your questions
- Identify expectation questions for director/leader, *see Phase 1 Reference List: McGoodwin, ND.*
- Request a mentor, *see Resource Library Phase 1: Criteria for Selecting a Mentor*
- Discuss current state with leader, *see Resource Library Phase 1: Criteria for selecting a mentor*
  - Identify personal development and unit performance goals/metrics with leader
  - Determine meetings (committees, taskforce, groups) to attend
  - Ask about succession planning for permanent nurse manager role

ACTIVITIES for Relationship Building

GOAL: Obtain information first

- Direct Reports and Key Stakeholders Priorities
  - Review job descriptions and performance evaluation criteria for all positions that report to you
  - Meet: 1:1 with direct reports use questions to identify the following: *What is going well? What is not going well? What needs to change? What are the strengths of the unit/department? What to expect from leader? How to communicate with leader.*
  - Meet: 1:1 with all clinical nurses use questions to identify the following: *What is going well? What is not going well? What needs to change? What are the strengths of the unit/department? What to expect from leader? How to communicate with leader.*
  - Meet with unit stakeholders
    - Pharmacy, central supply, emergency department, nutrition, quality improvement, risk management, laboratory, infection prevention, business liaison, EAP, wound, respiratory, security, physician, and provider leader(s), others
    - Use questions to identify the following areas: *What is going well? What is not going well? What needs to change? What are the strengths of the unit/department? What to expect from leader? How to communicate with leader.*

- Set up a process for communicating with stakeholders, nurses, direct reports, and your leader i.e., emails, social media, text messages, huddles, bulletin boards.
- Understand the 'slang' terms used by individuals from Generation Z, *see Phase 1 Reference List, Dictionary.com, 2022*

ACTIVITIES for Understanding the Practice Environment

GOAL: Assessment of environment

- Practice Environment Priorities
  - Review unit meeting minutes
  - Review 6-12 months of quality and nursing outcomes data (include turnover, education, and certification data)
- Obtain technology access
  - Ask for tutorial for new or unfamiliar databases
- Start a rounding practice, *see Resource Library Phase 1: Leadership Rounding Questions*
- Review unit, department, and hospital policies, *see Resource Library Phase 1: Policies & Procedures*
- Review the staffing/scheduling matrix
- Review staffing roster with outlined FTEs
- Review Decision-making Process & Tools, *see Global Resource Library: Electronic Sources: Mindtools, Decision-making*
  - DECIDE Model for decision-making
  - Decision Tree
- Utilize the following assessment tools: American Association of Critical Care Nurses Healthy Work Environment Assessment Tool, Clark Healthy Workplace Inventory and , *see Phase 1 Reference List, Clark, 2015*

ACTIVITIES for Managing the Business

GOAL: Understand the unit's financial status

- Finance Priorities
  - Meet 1:1 with financial representative
  - Review cost centers in budget and know the budget cycle
  - Understand overtime, sick time, and FMLA data
- Determine equipment needs and process for requesting equipment
  - Ask for equipment request database
  - Ask for process to return equipment
  - Ask how to request capital equipment
- Learn the payroll process
- Learn the process for obtaining a new position (position control allocation)
- Understand the productivity index for your unit/department

ACTIVITIES for Managing Human Resources

GOAL: Process for recruitment and retention

- Learn the recruiting process
    - Meet 1:1 with designated recruiter
    - Questions for recruiter
        - Ask about HR average time to fill critical positions
        - Ask for HR benchmarkable data and where to access data
        - Ask about the onboarding process
        - Ask about the internal transfer process
        - Ask about Behavioral based interviewing process
        - Ask about the recognition process, *if driven from the HR team*
        - Ask about the method of communication with HR recruiter
        - Identify immediate position needs and set the hiring process in motion
- If a union organization, ask for copy of contract, then read the union contract
- Learn the HR disciplinary process

ACTIVITIES for Managing the Leader Within

GOAL: Adopt healthy and helpful practices

- Health and Wellbeing Priorities
    - Utilize reflective journaling, *see Phase 1 - Resource Library: Reflective Journaling Questions*
    - Identify personal resilient building activities, *see Resource Library: Electronic Sources and Phase 1 Reference List: McCormick, ND*
        - Practice Daily Gratitude
        - Create a 'just get away' space
    - Set and communicate office hours
    - Set monthly or as needed meetings with mentor, *see Resource Library: Criteria for selecting a mentor*

PHASE 1: BROADEN & BUILD LEADERSHIP SKILLS

Objective: Grow and develop baseline leadership skills

ACTIVITIES for Growing Leadership Abilities

GOAL: Create a personal development strategy

- Leadership development priorities
    - Communication: Effective listening, EARS Listening Method, *see Phase 1 Reference List: Janove, 2022 and Clark & Fey, 2020*
    - Time Management, *see Phase 1 Reference List: Goldsby et al., 2020; Chunta & Boothby 2017; Psychology Today, N.D*
    - Stress Management, review self-care practices, *see Phase 1 Reference List: Ellis, 2022, Lyle-Edrosolo, 2023*

- Building trust, *see Phase 1 Reference List: Prestia, 2020; Yancer, 2012; Williams, 2006*
- Understanding the first 90 days, *see Phase 1 Reference List: Shirey, 2016*
- Leading former peers, *see Phase 1 Reference List: Sherman & Cohn, 2021, Thomas & Osborne-McKenzie, 2018*
- Understanding yourself, *see Phase 1 Reference List: Thompson, 2019.*
- Conflict competence, *see Phase 1 Reference List: AHA Center for Health Innovation; Clark & Fey, 2020; Robbins, 2018*

PHASE 1 - RESOURCE LIBRARY

INTERIM NURSE MANAGER JOB DESCRIPTION TEMPLATE
Nurse leaders to customize to meet organizational requirements.

Position Summary:

The Interim Nurse Manager is responsible for the development, implementation and evaluation of the care provided on the patient care unit(s), which is consistent with the established strategic plan, goals, and objectives for   . The Interim Nurse Manager is responsible for 24-hour management of the patient care unit. The Interim Nurse Manager supports optimal care that requires specialized knowledge, critical thinking and skills based on principles of psychological, social physical and biological sciences that utilize the nursing process. The Interim Nurse Manager demonstrates the attributes of   communicates exceptionally, and motivates others to achieve outcomes through work with multidisciplinary teams. Serves as chief recruitment and retention officer for department. Works in collaboration with nursing leadership to identify areas of improvement regarding practice, policies, and processes. The Interim Nurse Manager is directly accountable to the   .

PERSONAL SPECIFICATIONS

A. Education
- o Successful completion of an accredited nursing program.
- o Bachelor of Science in Nursing (BSN) required, Master of Science in Nursing preferred.

B. Qualifications and Experience
- o Current RN licensure in the State of [ADD state name]
- o Three to five years of clinical leadership required, with recognized knowledge and expertise in caring for specific patient populations, with evidence of successful change management.
- o Ability to direct others and to exercise judgment in problem-solving scenarios.
- o Strong leadership skills and ability to work collaboratively with a large team
- o Able to work efficiently under time constraints
- o Strong analytical and mathematical skills
- o Excellent interpersonal, written, and verbal communication skills
- o Able to lift 50 pounds

C. Special Skills/Knowledge
- o Must possess a comprehensive knowledge of general nursing theory and practice and an expanded knowledge of current clinical and specialized patient care concepts.
- o Must possess a broad and varied knowledge base that is continually enhanced and updated through self-directed study and participation in educational opportunities.
- o Must possess knowledge of performance improvement and quality standards.

- o Must possess knowledge of The Joint Commission and other regulatory standards.
- o Must be able to successfully complete basic computer course through in-hospital training; develops and maintains necessary computer skills including Word and Excel.
- o Must successfully complete in-hospital orientation and competencies.
- o National Specialty certification in area of practice is preferred.

D. Position Responsibilities

- Maintains nursing guidelines by writing and updating policies and procedures
- Adopts and implements innovative nursing practices to improve our facility
- Identifies patient service requirements by establishing personal rapport with potential and actual patients and other persons in a position to understand service requirements
- Manages nursing operations by initiating, coordinating, and enforcing program, operational, and personnel policies and procedures
- Establishes a compassionate environment by providing emotional, psychological, and spiritual support to patients, friends, and families
- Provides information to patients and health care team by answering questions and requests
- Manages various human resources functions including hiring, work assignments, coaching plans, and performance counseling.
- Demonstrates professional accountability by maintaining proficiency in assigned role and involvement in professional organizations.
- Contributes to the strategic and financial planning of the unit/department.
- Cultivates exemplary customer service throughout the unit/department by conducting customer service rounds and investigating and responding to patient/family and physician complaints.
- Coordinates patient flow by working directly with the Administrative Supervisor office, Case Management, Discharge Planners etc
-

Other Related Functions

- Knowledge of risk management concepts
- Participates in process improvement activities as assigned

Approval Signatures

Chief Nursing Officer   Date

Human Resources   Date

Acknowledgement Signature   Date

INTERIM NURSE MANAGER ORIENTATION CHECKLIST
Nurse leaders customize as needed.

<mark>*Suggestions for use: ask your leader for additional topic areas, priority to achieve activities, and who is the designated resource to contact.*</mark>

TOPIC	WHO	DATE COMPLETED & initial
WEEK 1		
Financial Management		
Human Resources		
Staffing & Scheduling		
Quality Improvement		
Change Management		
Relationship Management		
Leadership		
Professional Development		
Career Planning		
Week 2		
Financial Management		
Human Resources		
Staffing & Scheduling		
Quality Improvement		
Change Management		
Relationship Management		
Leadership		
Professional Development		
Career Planning		
Week 3		
Financial Management		
Human Resources		
Staffing & Scheduling		
Quality Improvement		
Change Management		
Relationship Management		
Leadership		

Professional Development		
Career Planning		
WEEK 4		
Financial Management		
Human Resources		
Staffing & Scheduling		
Quality Improvement		
Change Management		
Relationship Management		
Leadership		
Professional Development		
Career Planning		

CRITERIA FOR SELECTING A MENTOR

• Identify	• Assess your areas of strengths and biggest growth areas • Figure out your WHY. Why do you want a mentor. • Review any personality assessments taken, performance evaluation and current professional network. • What are your goals for the mentoring relationship? • Develop goals that are measurable (SMART). • Decide which goals you want to focus on.
• Search	• If there is not a mentoring program at your organization, then search for someone who can help you. • Access AONL Leader2Leader Member Community program • Consider the potential mentor's values, their characteristics, their successes, and how they are portrayed in their social media profiles.
• Compatible	• What personality type are you AND is your personality compatible with the mentor's? • Ask for an 'introduction' meeting.
• Commitment	• Is the mentor's schedule like yours? • What is the preferred method of communication? • What is the geographical location of the mentor? How would that impact commitment to the mentoring relationship? • Don't hold anything back! Give the relationship 100%.
• Make the ASK	• Contact mentor either through email, phone, social media direct message or in person meeting. • Share contact info. • Set meeting date.
• Prepare	• Prepare to be stretched. • Develop questions for each meeting. • Focus is on you and YOUR career goals, increasing your knowledge/skills, and giving you support • Review the Organization of Nurse Executives, New Jersey Mentorship Toolkit

LEADERSHIP ROUNDING QUESTIONS
==Nurse leaders customize as needed.==

AREAS	QUESTIONS FOR TEAMS
• Resources	• Tell me, what equipment, tools, and or information do you need to do your job more effectively?
• Safety	• What safety concerns did you identify since your arrival on shift?
• Communication	• Describe the issues you are having with other departments or services?
• Recognition	• Who would you like me to recognize for their helpfulness, attitude, and knowledge?
• Efficiency	• What systems and processes need to be improved?
• Leadership	• What is one thing that I can do to assist you right now?

Adapted from Lockhart, 2017, Blake & Bacon, 2020

CONTACT INFORMATION

Resource	How They Help	Phone	Office
Chief Nursing Officer (CNO)			
Nursing Director			
Administrative Supervisor			
Nursing Financial Management Liaison			
Human Resources Business Partner			
Infection Prevention			
Payroll software			
Nursing Education Specialist (NES)			
Nursing Informatics			
Nursing Operations – Staffing Office			
Nursing Quality & Safety			
Nurse Residency Program			
Patient Education			
Quality Dashboards			
Recruitment: Nurse Recruiter CNA/PCT Recruiter Travelers			
Risk Management Partner			
Staffing Structures			
Nutrition Services			
Pastoral Care			
Social Services (case management, social work)			

Respiratory Services			
Pharmacy			
Physical and Occupational Therapy Services			
Security			

POLICIES AND PROCEDURES
Nurse leaders to customize.

	NAME OF POLICIES
☐	Attendance, punctuality & Work Rules
☐	Visiting
☐	Dress and Appearance
☐	Behavior Expectations, Disciplinary Action, and Appeal
☐	Equal Employment Opportunity/ No Harassment/ Discrimination/ Retaliation
☐	Health Insurance Portability and Accountability Act (HIPAA)
☐	Parking
☐	Patient Rights
☐	Recording Paid Time
☐	Vacation and Holidays
☐	Life, Safety and Security
☐	Body mechanics/Lift Equipment
☐	Disaster Plan - external disasters
☐	Disaster Plan - internal disasters
☐	Diversity, Equity & Inclusion (DEI)
☐	Emergency Response and Teams
☐	Emergency Response Carts - Maintaining and Securing
☐	Fire Response Policy
☐	Location of exits, alarms, and Emergency Response Guide
☐	Material Safety Data Sheets (MSDS)
☐	Infection Control Policies
☐	Review Education, Tuition, Certifications, Travel
☐	Tuition Reimbursement

☐	Volunteers
☐	Patient Belongings
☐	Workplace violence
☐	Self-Scheduling

Note: this is not an exhaustive list.

REFLECTIVE JOURNALING QUESTIONS

The purpose of reflective journaling is to consciously consider and analyze situations, actions, and beliefs to increase self-awareness. Journaling, a method used to record experiences, creates deep analysis that can result in continual self-growth.

Step 1 Preparation:

1. Get your favorite writing instrument and notebook.

2. Designate a specific day and set aside a minimum of 15 minutes.

Step 2 Journaling:

Answer the questions below.

1. What is happening or has happened?

2. What am I feeling?

3. What do I want to change about the situation or how I handled the situation?

4. What have I learned?

5. What am I grateful for?

6. Who do I want to thank?

7. What do I want to learn more about?

Step 3 Be Kind to yourself and celebrate you.

SCHEDULE FOR MEETINGS

Leadership Meetings	When	Who Schedules
1:1 with nursing director		
1:1 with direct reports		
Budget Variance meeting		
Supply Chain meeting		
Physician Dyad Meeting		
Capacity Management Huddle		
Nurse Leader Council		
Leadership Development		
Nursing Grand Rounds		
Quarterly Conversation with CNOs		
Performance Metrics Review		
Staff Meetings and Unit Practice Council Meetings		
Add Additional meetings		

PHASE 1: REFERENCE LIST

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PHASE 2: SURVIVAL SKILLS *(5-8 Months)*

Objective: Decipher and prioritize goals

ACTIVITIES for Leading Change

GOAL: Understand the leaders' role with change

- Change Management
  - Determine readiness for change
  - Identify change model or process
    - If there is not a designated model, then review Prosci Change management and ADKAR model, *see Phase 2 Reference List: Bulluck et al., 2020; Prosci, ND.*
  - Change fatigue and nurse leader's role, *see Phase 2 Reference List: Camilleri et al., 2019.*
  - Trust the foundation for change, *see Phase 2 Reference List: Wymer & Stucky, 2023*

ACTIVITIES for Managing the Business

GOAL: Build the workforce

- Stay conversations
  - Discuss what stay conversations mean with HR representative
  - Draft and implement a plan for stay conversations
  - Review process or retention policy at your organization, *see Phase 2 Reference List: Finnegan, 2015 & Robeano, 2017*
- Team building strategies
  - Perform a teamwork analysis, *see Phase 2 Reference List: Gallup, 2020; Nelson, 2022, Sherman & Cohn, 2022 & Resource Library Phase 2: Assessment Tools SWOT, 5 Why's*
- Recognition practices
  - Identify how each team member would like to be recognized. *See Resource Library – Phase 2: My Favorites Tool,*

ACTIVITIES for Understanding the Practice Environment

GOAL: Create a safe environment for patients and teams

- Risk, Safety and Quality
  - Understand the leader's role and the safety culture, *see Phase 2 Reference List: Murray et al, 2018*
  - Determine how to use quality tools to drive and sustain a safe environment. Identify a framework for managing quality. Start with answering 3 questions:
    - Measurement – how are we doing?
    - Assessment – are we achieving targets?
    - Improvement – how can improvement be made?
- Social Determinants of Health, *see Phase 2 Reference* List: Miranda, 2022
  - HARM
    - Determine the organization definition of HARM
    - Maintain dashboard of harm events

- o Outcomes
  - ▪ Ask the question: Is there a relationship between unit outcomes and staffing? *See Phase 2 Reference List: Carver, 2022*
- o Regulatory readiness
  - ▪ Determine survey window dates and readiness status of your unit. *See Phase 2 Reference List: DiSciullo, 2021 (access digital content for checklists and forms)*

ACTIVITIES For Managing the Business
GOAL: Understand organizational processes
- Financial Management
  - o Learn the language of finance, *see Phase 2 Reference List: Muller, 2012, Welch & Smith, 2020; Smith & Welch, 2021*
  - o Capital budget
    - ▪ Identify the equipment for your unit which require capital funding
    - ▪ Determine the process for requesting capital funds
  - o Budget variance
    - ▪ Identify the process for managing budget variances.
    - ▪ Who do you need to notify? What is the timeline for notifications? What type of variance analysis is needed? Describe if the variance is favorable or unfavorable.
  - o Return on investment
    - ▪ Ask finance representative how your organization calculates an ROI
    - ▪ Ask finance representative in what situation should ROIs be used?

PHASE 2: BROADEN & BUILD LEADERSHIP SKILLS
ACTIVITIES for Growing Leadership Abilities
GOAL: Create a personal development strategy
- Leadership Development Priorities
  - o Understanding Team dynamics, *see Phase 2 Reference List: Belker et al., 2019*
  - o Working with teams, *see Phase 2 Reference List: Collison, 2020; Nelson, 2022; Sherman, 2019*
  - o Multigenerational teams, *see Phase 2 Reference List: Hess, 2021; MindTools, N.D., Sherman, 2022*
  - o Strategic Management, *see Phase 2, Reference List: Sherman & Cohn, 2019;*
  - o Leadership Principles and Theories, *see Phase 2 Reference List: Leclerc et al., 2020; Kowalski & Yoder-Wise, 2003*
  - o Just Culture, *see Phase 2 Reference List: Battard, 2017; Paradiso & Sweeney, 2019*
  - o Legal and Ethical Issues, *see Phase 2 Reference List: Lancaster, et al., 2022; Brous 2019; ANA, 2015*
  - o Professional Governance, *see Phase 2 Reference List: Porter O'Grady & Clavelle, 2021*

- Career Development
  - Construct career goals, discuss potential career opportunities with mentor, *see Phase 2 Reference List: Alvoet, 2019, Bernard & Oster, 2018, Griner, 2018*

PHASE 2 - RESOURCE LIBRARY

ASSESSMENT TOOLS

5 WHYS TEMPLATE

See https://public-library.safetyculture.io/products/5-whys-template for template

SWOT ANALYSIS TEMPLATE

Refer to example in Sherman and Cohn, 2022, p.15.

	Desired outcome	Not desired
Internal Factors	Strengths	Weaknesses
External Factors	Opportunities	Threats

UNIT DASHBOARD REPORT CARD TEMPLATE

Goal #1: NAME of goal	Outcome	Date
Baseline: *starting/current data point*		
Action: *what was done*		
Outcome: *what was achieved*		

MY FAVORITES TOOL

Question	Answer
This document helps you identify favorite item(s) that each team member likes to receive. Modify / customize the questions below to fit your style.	
Question	**Answer**
1. What is your favorite color?	
2. What is your favorite non-alcoholic drink?	
3. What is your favorite food?	
4. What is your favorite candy?	
5. What is your favorite style of music?	
6. What is your favorite non-work activity?	
7. What is your favorite pen?	
8. What is your favorite restaurant?	
9. What is your favorite place to vacation?	
10. Who is your favorite author?	
11. Who is your favorite band?	
12. What is your all-time favorite movie?	
13. What is your favorite quote?	
14. How do you like to be recognized? Public: Private: Written notes: Text messages with emojis:	
15. Please add anything else that I may have forgotten.	

PHASE 2: REFERENCE LIST

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PHASE 3: SURVIVAL SKILLS *(9-12 Months)*

Objective: Guide, direct, and connect permanent and interim roles

ACTIVITIES for Managing Leadership

GOAL: Connecting interim and permanent roles

- Problem solving, *see Phase 3 Reference List: Markovitz, 2020*
- Problem solving assessment tool, *see Phase 3 Reference List: Boi, 2021; Resource Library – Phase 3: Assessment Tools, Fish Diagram*

ACTIVITIES for Managing Communication & Relationships

Goal: Connecting a sustainable plan for continued relationship building

- Sustaining Relationships
  - Team assessment, *see Phase 3 Reference List: Lencioni, 2022, Eventus Training & Events, 2013, Wallace, 2016*
  - Cultural intelligence, *see Phase 3 Reference List: Richard-Eaglin, 2020*

ACTIVITIES for Managing the Leader Within

GOAL: Executing your 'leaving well' strategy

- Reflective Practice
  - Self-care, *see Phase 3 Reference List: Butler et al., 2019*
  - Reflective journaling, *see Phase 3, Reference List: Wilson, et al., 2022*
- Career Development
  - Formulate a plan for leadership transition, *see Phase 3 Reference List: Weston, 2018*
  - Review and then modify your career development plan

PHASE 3: BROADEN & BUILD LEADERSHIP SKILLS

Objective: Develop plan for ongoing leadership development

ACTIVITIES for Growing Leadership Abilities

GOAL: Continue the growth

- Leadership/Management
  - Building your leadership brand, *see Phase 3 Reference List: Sherman, 2018, Shirey, 2014; Sabnavis, 2021*
  - Creating your circle of Influence, *see Phase 3 Reference List: Brooks, 2022, Holley, 2020*
- Transition Theories and Principles, *see Phase 3 Reference List: Gowan, 2014, Bridges & Bridges, 2019*
- Career Planning
  - Proficiency requirements, review leadership standards of practice and competencies, take a leadership assessment to determine baseline skills, *see Phase*

3 Reference List: ANA, 2016; Hughes et al., 2022. See Resource Library: Electronic Sources, AONL Competency Assessment Tool
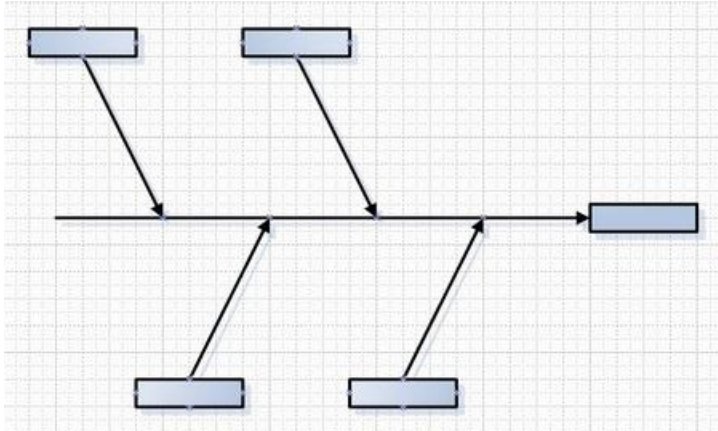
- o Leadership goals, finalize career goals, refresh your resume, and prepare for any upcoming interviews, *see Phase 3 Reference List: Brooks, 2021, Tuttas, 2020*

PHASE 3 - RESOURCE LIBRARY

ASSESSMENT TOOLS

FISH BONE DIAGRAM

Example to make your own

Watch this video: How to create cause-and-effect diagrams: https://youtu.be/mLvizyDFLQ4

PHASE 3: REFERENCE LIST

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GLOBAL RESOURCE LIBRARY

ELECTRONIC SOURCES

NAME	WEBSITE – PODCASTS - VIDEOS	TOPIC
LEADER WITHIN		
American Nurses Association Enterprise Healthy Nurse Healthy Nation	https://www.healthynursehealthynation.org/	Resources to improve the health of nurses and subsequently the nation
AONL Leader2Leader Member Community *Note: AONL membership is required to access resources*	https://www.aonl.org/membership/community	Resource community of leaders at all levels and settings
American Organization for Nursing Leadership (AONL) *Note: AONL membership is required to access resources*	https://www.aonl.org/careers/job-descriptions	Job descriptions for leadership and non-leadership roles
American Organization for Nursing Leadership (AONL) membership	https://www.aonl.org/membership/overview	Nursing leadership professional organization
AONL Nurse Manager Competencies	AONL Nurse Manager Competencies	Actions and behaviors to adopt into practice
AONL Nurse Leader Competency Assessment Tool	https://www.aonl.org/resources/online-assessments	Assessment tools to assess, measure, and develop your leadership skills
AONL Nurse Leader Podcast: Today in Nursing Leadership	https://www.aonl.org/nursing-leadership-podcast	Podcast with topics that are specific for nursing leaders

Duke Center for Health Care Safety and Quality	https://hsq.dukehealth.org/resilience-well-being/	Learn about the science behind health and well-being along with resources to help you achieve your wellbeing goals
Institute for Healthcare Improvement (IHI) Framework for improving Joy in Work *Note: IHI membership maybe required to access IHI resources*	IHIWhitePaper_FrameworkForImprovingJoyInWork.pdf (ncha.org)	Framework for improving Joy in Work.
IHI Video: "Increase Joy in work" *Note: IHI membership maybe required to access IHI resources*	https://www.ihi.org/education/IHIOpenSchool/resources/Pages/AudioandVideo/Jessica-Perlo-Four-Steps-Leaders-Can-Take-to-Increase-Joy-in-Work.aspx	How to adopt Joy in Work strategies
National Specialty Certification	AONL Credentialing Center https://www.aonl.org/initiatives/certification ANCC https://www.nursingworld.org/our-certifications/	Resources to determine the process for obtaining certification
The National Academy of Medicine *Action Collaborative on Clinician Well-being and Resilience*	https://nam.edu/initiatives/clinician-resilience-and-well-being/	Strategies organizations can take to improve the health and wellbeing of individuals
The National Institute for Occupational Safety and Health (NIOSH) Total Worker® Health Program	https://www.cdc.gov/niosh/twh/default.html	Specific actions to protect the health and safety of healthcare workers

The United States Surgeon General's Advisory on Building a Thriving Health Workforce Health	https://www.hhs.gov/surgeongeneral/priorities/health-worker-burnout/index.html	The health of the United States is dependent on the health of its health workers
PROFESSIONALISM		
ANA Scope & Standards of Nursing Administration	https://www.nursingworld.org/nurses-books/nursing-administration-scope-and-standards-of-practice-2nd-edition/	Outlines the core responsibilities, accountabilities, qualifications, and ethical standards for the role of nurse leaders
AONL Advocacy Day	https://www.aonl.org/aonl-advocacy	Informs nurse leaders about why, how, when, and what about advocacy
Ethics	Markkula Center for Applied Ethics https://www.scu.edu/ethics/focus-areas/bioethics/ ANA Ethics & Human Rights https://www.nursingworld.org/practice-policy/nursing-excellence/ethics/	Resources for exploring ethics
Health Equity AHA	https://www.aha.org/heal https://ifdhe.aha.org/	Resources focused on how organizations can advance health equity
Just Culture	The Just Culture Company – The Learning Resource for Just Culture Proficiency	Website with additional resources to build a just culture

Social Determinants of Health	https://www.ihi.org/communities/blogs/understanding-the-social-determinants-of-health-and-what-gets-missed-when-you-dont	
COMMUNICATION & RELATIONSHIP MANAGEMENT		
IHI Joy in Work Conversation guide *Note: IHI membership maybe required to access IHI resources*	https://www.ihi.org/resources/Pages/Tools/Joy-in-Work-What-Matters-to-You-Conversation-Guide.aspx	How to have conversations to enhance Joy in Work?
Preciate: 103 Examples of Workplace Recognition to boost employee engagement, Lydia Stevens	https://preciate.com/103-examples-workplace-recognition/	*Resource which outlines 103 adaptable examples for recognizing the work of individuals*
How to Get Ready for "What Matters to You?" Conversations	https://www.ihi.org/education/IHIOpenSchool/resources/Pages/AudioandVideo/Jessica-Perlo-How-to-Get-Ready-for-What-Matters-to-You-Conversations.aspx	*How to have a 'what matters to you conversation'*
KNOWLEDGE OF THE HEALTH CARE ENVIRONMENT		
American Association of Critical Care Nurses (AACN) Healthy Work Environment (HWE)	https://www.aacn.org/nursing-excellence/healthy-work-environments	Assessment and components for creating a healthy work environment
American Association of Critical Care Nurses (AACN) Beacon Awards	https://www.aacn.org/nursing-excellence/beacon-awards	Criteria to create and measure excellence at the unit level
National Academy of Medicine Future of Nursing Report: Charting a path to create health equity	https://nap.nationalacademies.org/catalog/25982/the-future-of-nursing-2020-2030-charting-a-path-to	Specific tactics for improving the health of patients and the profession

BUSINESS SKILLS & PRINCIPLES		
AONL Nurse Leadership Compendium	https://www.aonl.org/resources/Nurse-Leadership-Workforce-Compendium	Resources and best practices created by AONL to support and manage the nursing workforce
YouTube video: Healthcare Finance with Steve Febus	https://youtu.be/N-SumPdb2PI	Session which outlines how to understand healthcare costs
Family and Medical Leave	https://www.dol.gov/agencies/whd/fact-sheets/28-fmla	FMLA Guidelines
Healthcare Finance Management Association (HFMA) Note: HFMA membership maybe required to access resources	https://www.hfma.org/	Association which provides resources to manage finances.
LEADERSHIP		
American Association of Nurses National Commission to Address Racism in Nursing	https://www.nursingworld.org/practice-policy/workforce/racism-in-nursing/national-commission-to-address-racism-in-nursing/commissions-foundational-report-on-racism--in-nursing/	*This link is to the actual report; however, additional resources can be found on the ANA website*
Diversity, Equity, & Inclusion (DEI)	https://www.youtube.com/watch?v=mwNjYe7MM7Y	*Are Our Perceptions of Age Distorted?*
Diversity, Equity, & Inclusion (DEI)	https://www.youtube.com/watch?v=UYCxAIqjyCA	*Age Discrimination Food Truck Experiment*

Emerging RN Leader Leadership Blog, Rose Sherman, EdD, RN, NEA-BC, FAAN	https://www.emergingrnleader.com/	Useful ideas and resources for nurses who desire leadership growth
Johnson & Johnson Nursing Nurse Led Innovation	https://nursing.jnj.com/guide-to-nurse-innovation/innovate-now/	Describes nurse led innovation, education, how innovation is moved forward
MindTools, Decision-making resources *NOTE: A free account is needed to access resources*	https://www.mindtools.com/aiplsat/how-to-make-decisions	Resources to enhance career, well-being, and leadership skills
Psychology Today, Decision-making	https://www.psychologytoday.com/us/basics/decision-making	Concise resource descriptions of types, how to, and tips for averting bad decisions
WK. Kellogg Foundation Expanding Equity Inclusion and Belonging Guidebook	https://wkkf.issuelab.org/resource/expanding-equity-inclusion-belonging-guidebook.html	Resources for leaders to use to enhance equity, inclusion and belonging in the workplace

GLOSSARY OF TERMS
Nurse leaders add or delete terms as needed.

Abbreviation	Term	Meaning
BERT	Behavioral Emergency Response Team	Emergency team with BH experience, respond to BH emergent patients
CNS	Clinical Nurse Specialist	Advanced Practice Registered Nurse with population specific expertise
DEI	Diversity, Equity & Inclusion	*Diversity:* the many ways humans are different. *Equity:* creating fair access, opportunity, advancement. *Inclusion:* feeling valued & belongingness.
EHS	Employee Health Services	Health services geared to the improvement of the heath of employees
EAP	Employee Assistance Program	Short term confidential, voluntary professional counseling services
FMLA	Family and Medical Leave	Grants eligible team members the ability to take unpaid, job protected leave for family, and medical reasons without losing insurance coverage.
IR	Incident Report	Written documentation describing trauma, errors, omissions of care, adverse accidents that occur to patients, visitors, and team members. In some States

		this document is discoverable
HR	Human Resources	Department whose sole focus is on hiring, retaining, and managing policies along with employment conditions
AS	Administrative Supervisor	Manage patient flow, staffing, patient complaints, and unexpected crises throughout a hospital
IT	Information Technology	The application of technology, (systems, software, and networks) to process data for the purpose of solving problems
LTACH	Long Term Acute Care Hospital	Certified as acute care hospitals, with patient LOS greater than 25-30 days
NA	Nursing Assistant	Provides direct care to patients under the direct supervision of a licensed nurse
NED	Nursing Education & Development	Education focused on the care of the patient and the development of the nurse
CI	Clinical Informatics	Integration of computer healthcare, and cognitive sciences to manage healthcare information
NI	Nursing Informatics	Sub field of Informatics where the focus in on the role of the nurse

NLO	New Leader Onboarding (determine name in your organization)	Orientation specifically designed for leaders who are new in their role
NM	Nurse Manager	Nurse leader who has 24/7 responsibility for the functioning of a unit/department
NR	Nurse Resident	Newly licensed nurse or newly graduated nurse
PCT	Patient Care Technician	Some organizations use the term PCT. However, role responsibilities are the same as the NA.
PG	Professional Governance	A collaborative governing structure which enables professional nurses to own practice decision
RRT	Rapid Response Team	Team of highly skilled clinicians who provide critical care expertise to patients
SNA	Student Nurse Assistant	Individual who is currently enrolled in a formal nursing program and is hired by a hospital to work along side a registered nurse caring for patients
SNF	Skilled Nursing Facility	Care focused on inpatient medical and rehabilitation treatment given by licensed professionals
VAT	Vascular Access Team	Highly skilled RNs who are knowledgeable regarding vascular access and infusion therapy

VM/VMT	Video Monitoring/Video Monitor Technician	Provides constant observation and monitoring of patients who are high risk using technology
WHPUOS	Worked Hour per Unit of Service	Metric used to measure labor productivity
UM	Utilization management	Cost effective process for healthcare products while preserving quality patient care
Harm	HARM	A negative outcome that impacts a patient's quality of life
NSI	Nursing Sensitive Indicators	Specific criteria for determining changes associated with an individual's health; changes are a direct result of the care given by a nurse
RIW	Reduction in Workforce	Employment is ended for one or more individuals due to closure or restructure of company
ANA SSP	ANA Scope and Standards of Practice	Document which outlines the expected competent behaviors and actions for all registered nurses regardless of the setting
CB	Capital Budget	Expenditures for buildings, equipment with a large dollar amount and will be used for greater than 1 year
BGT	Budget	Financial plan that gives quantitative information about income and expenses

PR	Productivity	Ratio of a given measure, output to input. Provided nursing services equals output; inputs are resources used to provide services
BV	Budget Variance	Difference between projected budget and actual
PC	Position Control	Database used to identify the number of team members along with the number of hours per week
RM	Risk Management	Practice of dealing with risk through planning, assessment, analyzing, and monitoring risks
SPO	Structure, Process, Outcome	Known as the Donabedian model. All three elements which are linked. Structure describes where care is given. Process is what is done between the patient and nurse, i.e., communication, care activities. Outcomes are the result, the effect on the patient

ADDITIONAL REFERENCES

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