



TL6 – The CNO advocates for organizational support of ongoing leadership development for all nurses, with a focus on mentoring and succession planning. Provide one example, with supporting evidence, of each of the following activities:

Mentoring or succession planning activities for clinical nurses

And

Mentoring or succession planning activities for nurse managers

And

Mentoring or succession planning activities for nurse leaders (exclusive of nurse managers)

And

Mentoring or succession planning activities for the chief nursing officer

UVA offers many opportunities for nurses at all levels to seek mentorship and leadership development. Internal and external activities are supported by CNO Lorna Facteau to promote interest and engagement.

Example 1: Mentoring for Clinical Nurses

The Professional Nursing Staff Organization (PNSO) shared governance structure employs a Chair and Vice Chair model. For clinical nurses serving on local or central committees, the Vice Chairs are mentored for one year by the current chair. This provides them the opportunity to understand the chair role and to gain experience in some of the duties. [Exhibit TL6.a](#) is a chart that shows the roles and responsibilities of local shared governance participants. ([Exhibit TL6.a: PNSO Committee and Chair Role Expectations](#)) Orientation classes are held each fall to prepare rising chairs. The PNSO president leads the classes and serves as an additional resource and mentor as participants proceed through the year. [Exhibit TL6.b](#) shows completed rosters from the December 2013 classes. ([Exhibit TL6.b: December 2013 Committee Chair Orientation Attendees](#))

Each month, the PNSO sends all committee chairs a shared governance topic to be included in their respective agendas. It includes information, suggested activities and resources on the specific topic. In September 2013, the topic was mentorship. [Exhibit TL6.c](#) is the tool that was sent to committee chairs. ([Exhibit TL6.c: 9/13 Shared Agenda Topic: Mentorship](#))



Additionally, our central PNSO chairs receive mentoring by Director for Nursing Governance Programs: Nursing Practice and Research Holly Hintz, MSN, RN, NE-BC. Her role was designed to support clinicians in the committee leadership process by coaching them through steps to align efforts among various groups and committees, understand organizational structure to direct their efforts, and connect them with resources to facilitate their work. This relationship builds individual leadership skills and strength in our shared governance programs. An excerpt from the Essential Job Functions of her job description defines the expectation:

Partners with leadership and staff in achieving outcomes within the Professional Nursing Staff Organization:

- Ensures shared governance principles and structure / process are incorporated in divisionwide activities
- **Provides mentorship and guidance to PNSO President and President-elect and PNSO Central Committee Chairs**
- Collaborates with PNSO leaders in strategic planning to achieve goals and objectives
- **Provides mentorship and logistical support to maximize the impact of clinicians' contributions**
- Provides support for nursing events and recognition activities
- Collaborates with managers/administrators in guiding/facilitating shared governance outcomes
- Supports PNSO Management Committee in implementation of approved PNSO initiatives

The Learning and Organizational Development's (L&OD) Informal Leader class provides training with ongoing mentorship for high-potential nurses who are considering advancement opportunities. Supervisors across the Health System are encouraged to nominate employees who they consider to be a positive influence within their department. Throughout this invitation-only, three-month course, participants are taught basic leadership skills to help foster relationships based on a foundation of trust, hold crucial conversations, and create a culture of accountability within their work unit. Table 1 below describes the course overview.

TL6 Table 1. Informal Leadership Program Course Overview

Class	Program	Description
1	Develop Trust in Self and Others	Participants will learn the levels of trust, associated characteristics and actions they can take to build trust with patients, peers and others. They will also learn how to detect and manage trust violations so that they don't destroy one's ability to lead and be effective.



		Finally, an emphasis will be placed on why trust is the key to work relationships.
	Identify Your Style Under Stress	Participants will learn to identify when a conversation is becoming crucial and to explore their own reactions during a crucial conversation. Finally, they will learn the tools to use for talking when the stakes are high.
2	Speak Assertively, Not Aggressively	Participants will learn how to keep from becoming defensive or upset during a crucial conversation and to help others leave their silence/violence behind and engage in productive dialogue. In addition, they will learn to defuse a hostile situation and move to problem solving.
	Create a Safe Environment for Others to Speak	Participants will learn to build safety through mutual purpose and to create an environment in which people can freely discuss issues and concerns. They will determine how their actions impact others.
3	Customer Service in the Forefront	Participants will learn customer service techniques: RISE expected behaviors, Key Words at Key Times, AIDET principles and Service Recovery.
	Accountability – What Do You Own?	Participants will learn how to identify accountability, who owns it, and the tools necessary to hold each other accountable, starting with themselves.

In addition, participants are required to engage in assignments outside the classroom to practice their learned skills in the work environment. Supervisors provide mentorship as they support the learning through monthly coaching conversations with the learner. ([Exhibit TL6.d: Informal Leader Roster](#))

The PNSO Management Committee is a central committee whose purpose is to support and coordinate the implementation of projects and changes authorized by PNSO and institutional committees. Five clinician seats on this committee were filled via a selection process by the committee members for clinical nurses who have expressed interest in pursuing management. This one-year term of service provides an opportunity for mentorship by experienced managers in addressing the practical aspects of change management through a committee process. They experience guided exposure to institutional committee work and learn how different parts of the organization interface to develop and execute changes. ([Exhibit TL6.e: PNSO Management Committee Roster](#))



Example 2: Mentoring for Nurse Managers

L&OD offers an extended orientation for anyone hired/promoted into a leadership role in the health system. This six-month series is designed to help new leaders assimilate into the culture by providing a high-level overview of the basics needed to be a successful leader at UVA. Subject matter experts at the senior leadership level facilitate the series in an attempt to provide networking opportunities while increasing exposure and approachability to senior leadership. The New Leader Orientation Series includes the following topics:

- Leadership Essentials
- Focused Customer Service
- Health Care Business Acumen
- Expecting the Best Quality and Service
- Human Resources Workforce Planning
- Leadership Culture

Additionally, every new leader is assigned a Human Resources assimilation coach to help them navigate the responsibilities of their new role. This coaching also provides a safe environment to discuss and apply management practices. [Exhibit TL6.f](#) is a list of all of the new leaders and their assigned coaches since April 1, 2012. ([Exhibit TL6.f: New Leader Assimilation Coaching since 4-1-12](#))

All new nurse managers in our system receive one-on-one or small-group briefing and coaching in shared governance through our Foundations of Nursing Excellence program via Director of Nursing Governance Programs Holly Hintz, MSN, RN, NE-BC, or Magnet Program Manager Jennifer T. Hall, MSN, RN, CNL. As soon as the dust settles with their initial orientation to the institution and their home area, the new manager is contacted by Hintz or Hall to set up one to two sessions to discuss the program's content. The goal of conveying core nursing shared governance, career ladder and evidence-based practice content to new managers has been achieved with all new managers since the program's inception in 2013. ([Exhibit TL6.g: Foundations for Nursing Excellence Class Content](#)) The sessions connect the new managers with core nursing resources to build their leadership practice, provide them with a name and a face of someone they can direct system questions to, and offer support as nursing challenges arise in the early months of their tenure at UVA. Table 2 below lists the sessions provided since March 2013.

TL6 Table 2. Foundations For Nursing Excellence Program Attendees

Name	Unit/Department	Date
Lauren Carey	6 East	3/4/2013
Sandy Neumayr	PICU	7/2/2013 and 7/11/2013



Beverly Schuckert	NICU	7/2/2013 and 7/11/2013
Joyce Thompson	Labor and Delivery	7/2/2013 and 7/11/2013
Ceil Ouwerkirk	Ambulatory Operations	10/29/2013
Laquita Pinchback	Ambulatory Operations	10/29/2013
Susan Jackiewicz	Ambulatory Operations	10/29/2013
Catherine Cash	Ambulatory Operations	10/29/2013
Danielle Lagana	Ambulatory Operations	10/29/2013
Iris Welsch	OPSC	7/28/2014
Debra Owens	NICU	7/8/2014
Christina Staton	3 West	7/10/2014

L&OD provides a six-month leadership series called Best Practices in Management I, which focuses on transactional leadership – a type of leadership style that is process-oriented, whereby leaders guide and motivate followers in the direction of established goals by clarifying roles and task requirements. This series provides tools needed for success in the following areas:

- Developing Trust in Self and Others
- Team Dynamics and Engagement
- Onboarding High Performers
- Accountability
- Performance Management
- Developing and Recognizing Others

Following successful completion of the Best Practices in Management I Series, leaders are invited to attend the second installment, Best Practices in Management II, which focuses on transformational leadership – a type of leadership style that is aligned with the goals and vision of the organization. Transformational leaders drive change, trading short-term stability for long-term viability. These leaders must know how to motivate a variety of individuals and be willing to shed old ways of thinking to make room for the new. This series covers the following topics:

- Emotional Intelligence and Self-Awareness
- Learning Agility
- Communication and Listening
- Motivating and Engaging Others
- Networking and Negotiation
- Managing Change

In addition to the classroom content, participants take part in bimonthly coaching sessions in an attempt to operationalize the concepts and increase self-awareness. Participants engage in a variety of assessments (i.e., 360-degree feedback, learning



agility, etc.) to help identify strengths and improve areas of opportunity. ([Exhibit TL6.h: Best Practices In Management Roster](#))

L&OD hosts quarterly, off-site leadership retreats with national speakers. Each retreat focuses on a systemic topic within the organization. Previous topics have included Managing Generational Differences, Rewards and Recognition, Patient Satisfaction, and Quality. All nurse managers and nurse leaders attend these interdepartmental, interprofessional sessions.

All managers and above receive regular coaching sessions by L&OD in employee engagement principles, action planning and team follow-up. These sessions use evidence-based content to develop skills in tailoring day-to-day management priorities and skills to maximize employee engagement with a goal of developing and retaining engaged staff. These sessions provide interaction with peers across the system. Managers can request additional on-site assistance from L&OD to support specific action planning needs on their units. This results in one-on-one mentoring in how to continue tailoring leadership skills to meet the needs of the staff.

American Organization of Nurse Executive (AONE) fellowships are available to nurse managers who are interested in an in-depth learning experience to strengthen skills and gain new leadership competencies. Participants attend retreats, engage in experiential and virtual learning, and attend the national AONE meeting. Angel Cyphert, MSN, RN, Nurse Manager of the Post-Anesthesia Care Unit, and Brian Zwoyer, MSN, RN, Nurse Manager of 5 West and 5 North, were both supported to enroll in the AONE fellowship program. ([Exhibit TL6.i: Cyphert and Zwoyer AONE Travel Forms](#))

The Nurse Leadership Institute of Virginia is a statewide program for nurses who serve as, or have been identified as having potential to be, a nurse manager or member of the management team. This nine-month program builds nurse leadership skills, innovative thinking and confidence. Approximately 30 nurses from across the state participate each year. The program is based on the Healthcare Leadership Alliance Competency Directory. In May 2013, John Ehrhart, MSN, RN-BC, Nurse Manager of 5 Central, enrolled in this program with full support from Lorna John's participation provided him with additional opportunities to receive mentorship. ([Exhibit TL6.j: NLI John Ehrhart - Facticeau Letter](#))

Example 3: Mentoring for Nurse Leaders (Directors/Administrators)

The L&OD leadership mentoring Best Practices in Management I and II coursework that is used to guide the development of nurse managers is also used to develop directors and administrators at UVA. These leaders actively participate in the interactive sessions to build the knowledge and skills that they need to enhance their performance. They network and collaborate with each throughout the sessions. They also obtain tools and techniques to maximize the effectiveness of their role. The courses are designed to



promote leadership development as individuals and as a team of nurse leaders. [Exhibit TL6.k](#) is an example of one of the tools that attendees use to follow up with their leaders following their participation in the classes. ([Exhibit TL6.k: Holly Hintz Educational Plan](#))

Team retreats are another opportunity for leader and peer mentoring facilitation. In November 2013, Lorna hosted a retreat for nurse leaders. This protected group time included self-reflection activities, peer feedback exercises and discussions about bringing out the best in every member of the team. Specific group facilitation methods were used to engage the nurse leaders in idea sharing and brainstorming to achieve local and enterprise goals. ([Exhibit TL6.l: 111213 CNO Team Retreat](#))

In addition, the CNO meets monthly with each of the nurse leaders in a one-on-one session to review goals and establish plans. They use a designated template to guide the session so that each nurse leader meeting covers the necessary agenda items. ([Exhibit TL6.m: PCS One On One Donna and Lorna](#)) This structured time is an opportunity for these nurse leaders to receive coaching and mentorship from the CNO.

Building from these sessions and the overall support of the CNO, nurse leaders are embarking on new professional leadership opportunities. For example, Jody Reyes, MSBA, BSN, RN, OCN, Administrator for Cancer Services, participated in Leadership in Academic Matters (LAM). ([Exhibit TL6.n: Reyes LAM 2013 Invite and Calendar](#)) LAM participants are nominated by leaders and represent a range of faculty and top administrators from across the Health System and the University. Sessions are conducted over the course of several months and are facilitated by experts in leadership, business and higher education. Sessions focus on key professional development areas such as self-awareness, managing organizational change, financial and strategic decision-making, assessing the dynamics of successful leaders, conflict resolution and negotiation, teamwork, media relations, and establishing life balance in a dynamic and growing career. Following the conclusion of the 10-week program, quarterly sessions continue to provide new topical seminars that are open to alumni from all prior LAM programs. Reyes is mentored through her participation in the program and the collegial relationships that she is building within the program.

Another example is the leadership development of Karin League, MSN, RN, NEA-BC, Associate Chief for Children's Hospital and Women's Services. League became a certified performance excellence examiner appointed to the 2014 Board of Examiners of the Malcolm Baldrige National Quality Award. The prestigious Baldrige Award is given by the president of the United States to business, education and healthcare institutions that are determined to be outstanding in seven performance measures. This allows League to gain exposure to high-performing organizations and share best practices within the organization through peer mentorship with other nurse leaders. ([Exhibit TL6.o: Baldrige Certificate LeagueKL](#))



Nurse leaders also have many opportunities for growth, development and mentorship from the resources made available to them outside of the health system. Each year Facteau encourages her nurse leaders to actively participate in and attend leadership conferences. Between July 1, 2013, and May 1, 2014, 23 conferences were attended by nurse leaders. Support totaled \$53,274.26. At the conferences, attendees learn from national nurse leaders about novel approaches to management, patient care and related leadership topics.

Nurse leaders are encouraged to actively participate in professional organizations to contribute to the work of the discipline and gain knowledge and experience from a broader professional landscape.

Example 4: Mentoring for Chief Nursing Officer

CNO Lorna Facteau, DNSc, RN, has been a nurse for 46 years. Her wide variety of experiences in direct care, education, professional organization leadership and nursing administration position her to be the mentor more often than the mentee. Despite this, Facteau actively seeks avenues to learn and grow in her leadership position.

The Medical Center Operations Group consists of the chiefs and Associate Vice President of Hospital and Clinic Operations. Periodic retreats are offered and involve feedback and coaching from peers and executive leaders. Specific organizational work is featured, and group work is conducted in a structured framework to achieve desired outcomes. The group engages in discussion about working collaboratively, communication, growth and development. ([Exhibit TL6.p: 041414 MCOG Retreat](#))

In 2013, the group engaged in a methodical approach to succession planning. A talent review process was conducted to identify strengths and opportunities for growth within the senior leadership group. The process was administered by Learning Officer Rebecca Schmale, PhD, Administrator for L&OD. Schmale held structured interviews with key leaders and team members to gather information to create an individual leader profile. In addition, the process provided the organization's executive leadership with an assessment of "bench strength" for future planning. [Exhibit TL6.q](#) is a document illustrating the process and tools used; note that the actual content has been redacted, due to the extremely sensitive nature of the assessment. ([Exhibit TL6.q: Talent Review Magnet Redacted](#))

Facteau also engages in monthly one-on-one executive coaching with Schmale. Topics include the following:

- Setting the vision
- Holding people accountable
- Dealing with difficult peers



- Managing up
- Creating a culture of trust
- Influencing

Facteau completed the Lominger viaEDGE Learning Agility assessment on April 25, 2014. She was mentored on how to develop greater learning agility and how to coach her direct reports. ([Exhibit TL6.r: Facteau Individual Learning Agility Summary Report](#))

External offerings are an additional venue through which mentoring occurs. As a member organization, the Advisory Board offers UVA a wealth of executive resources and development opportunities. In January 2013, Facteau participated in the Advisory Board Nurse Executive Center Meeting. ([Exhibit TL6.s: 2013-2014 Advisory Board Nurse Executive Center Meeting](#)) This event provides CNOs an arena to explore relevant topics and share best practices related to their unique leadership roles. Another resource is the University Hospital Consortium. Facteau attends the annual UHC conference to network with peers and learn about executive leadership content unique to academic health systems.