Advocacy and Influence TL7

- Choose 3 of the following (one example **MUST** be from ambulatory care setting, if applicable):
  a. Provide one example, with supporting evidence, of succession-planning activities for the nurse manager role.
  b. Provide one example, with supporting evidence, of succession-planning activities for the APRN role.
  c. Provide one example, with supporting evidence, of succession-planning activities for the AVP/nurse director role.
  d. Provide one example, with supporting evidence, of succession-planning activities for the CNO role.

**Example a: Nurse Manager Succession Planning**

Nurse managers at WakeMed Health & Hospitals have 24-hour responsibility at the unit level for planning, facilitating, coordinating and evaluating patient care services, personnel and budgeting process. Nurse managers understand the needs of the organization and support its mission, values and management of patient care services. Essential position duties and responsibilities include nursing operations management, nursing practice and outcome improvement, nursing clinical competency oversight, budget management and human resources management.

**Succession Planning Activities**

Clinical Nurse Stormy Penland, MSN, RN, CEN was identified in her annual evaluation as a leader in the Adult Emergency Department (AED), Raleigh Campus, by her immediate Clinical Supervisor/Educator in AED, Sarah McIntyre, MSN, RN, CEN, and her Nurse Manager in AED, Kippy Woodlief (Speicher), BSN, RN, CEN. Her 2016 annual evaluation was prepared and presented by her immediate supervisor, McIntyre, who noted that Penland is a charge nurse and a mentor in the department. McIntyre commented that Penland “functions in a leadership role within the department” and identified a goal for Penland to “seek supervisor/educator position.” (Evidence TL7a-1, Penland’s 2016 Annual Evaluation)

Penland was promoted to Supervisor/Educator AED in March 2017. Woodlief, Nurse Manager of AED, sent an email to Jill Whade, BSN, RN, CPN, Magnet Coordinator, and Betty Woodard, PhD, RN, Director of Research and Evidence Based Practice, in July 2017 identifying Penland as a candidate for manager succession development. (Evidence TL7a-2, Email Nurse Manager Succession Planning)

**Leadership Courses**

Based on Penland’s proven leadership in the department and Woodlief’s succession plan for her for the nurse manager position, she was encouraged by Woodlief and Brittany Komansky, MHA, BSN, RN, CEN, Director of Emergency Services, to take all the management courses offered by WakeMed’s Organizational Development Department. Penland committed to taking these courses, focusing on those with a
leadership and management theme to assist with her growth as a leader. Penland was also in the final stages of completing a master’s in nursing, again demonstrating her commitment to her professional development.

Woodlief encouraged Penland to enroll in direct manager classes, as noted in Penland’s 2016 annual performance evaluation. Woodlief also requested that Penland take the leader role for an ED Rapid Process Improvement Workshop (RPIW) in March 2017 as part of the succession planning activities. During the RPIW, Penland had the opportunity to speak with Denise Warren, Chief Operating Officer and Executive Vice President, who invited Penland to come to her office to borrow the book *Transforming Healthcare*. While speaking with Penland, Warren identified her as a candidate to begin WakeWay 2 Excellence (WW2E) Leadership Training and made the recommendation. (Evidence TL7a-3, WW2E Education Leadership Training Email)

The courses Penland attended included:

- State Medical Assistance Team (SMAT) training: March 2018
- Sexual Assault Nurse Examiner (SANE) training: February 2018
- Critical Incident Stress Management CISM Training: June 2018
- Speed of Trust: December 2016
- People See Things Differently: February 2017
- Impacting Others Through Your Behavior: March 2017
- Employee Selection and Interviewing: April 2017
- Charting the Course: Quality and Satisfaction for Nurse Leaders: April 2017
- Communication in Healthcare: May 2017
- Charting the Course: Team Development for Nurse Leaders: May 2017
- Communicating Effectively: May 2017
- Foundations of Leadership: June 2017
- Charting the Course: Budget for Nurse Leaders: June 2017
- Leading a Fair and Just Culture: June 2017
- Charting the Course: Unit Operations for Nurse Leaders: August 2017
- Coaching for Success and Improvement: August 2017
- Healthcare Finance for Nurse Leaders: August 2017
- Leading at the Speed of Trust: August 2017
- WW2E Leadership Training: December 2017-November 2018
- The Key to an Engaged and Passionate Workforce: March 2019

(Evidence TL7a-4, Penland’s WakeMed U Transcript)

**Weekly Succession Planning Meetings**
As Penland was completing the leadership courses, she proactively sought advice from Woodlief during their weekly supervisor/manager meetings. Woodlief provided Penland with numerous projects to assist in her professional development to prepare her for a nurse manager role. Projects included budget preparation, FTE distribution, scheduling, payroll and the interviewing process. Woodlief also engaged Penland in discussions about upcoming budget year considerations for capital and minor equipment. (Evidence TL7a-5, Supervisor/Manager Meeting Minutes)
Interim Nurse Manager Role
On October 14, 2018, Penland started in the interim Nurse Manager role in the Cary ED following the abrupt departure of the previous manager. Amy Short, MSN, RN, NE-BC, Director of Emergency Services, 1East CEA, Heart and Vascular Unit Cary Campus, was aware that Penland was being prepared for a manager role. Short spoke to Komansky and Woodlief, who both agreed that Penland would be an ideal candidate for this role and that it would provide be an excellent opportunity for her to put to use the skills she had been working on. Penland readily accepted the offer of the interim manager role. The permanent position would be posted, and Penland would have the opportunity to apply and interview for it.

Penland spent her initial weeks in the Cary ED meeting key stakeholders, learning the flow of the department and getting to know the team members. She also spent time with the Facilities Engineering manager, the Environmental Services manager, the director of Finance and others. Short and Penland reviewed the orientation checklist and ensured Penland received additional training that included the financial reporting software and employee tracking system.

Penland interviewed for the Cary ED nurse manager position in January 2019, and she was announced as the permanent ED nurse manager later that month.