

Human resources

Succession: Identifying and mentoring OR leaders

Second article in a 2-part series.

The first article appeared in the December OR Manager.

"Not all staff nurses can or want to be managers," says Judith Mercado, RN, CNOR, nursing service director for perioperative and maternal child health services for Kaiser Permanente Los Angeles Medical Center. "Informal leaders stand out; they are the superstars of the group."

Identifying those leaders and mentoring them into the management role is key for successful succession planning. In part 2 of this series, we'll discuss just how to do that. Part 1 was in the December 2012 OR Manager.

Identify potential leaders

Rose Sherman, EdD, RN, NEA-BC, CNL, FAAN, associate professor at the Christine E. Lynn College of Nursing at Florida Atlantic University in Boca Raton and director of the college's Nursing Leadership Institute, recommends asking informal leaders if they have considered management roles, saying, "I see you as a leader."

This plants a seed that can help a staff member grow greater confidence.

Mercado says honesty is important when talking to those who express interest in management.

To leave a staff position and become a manager is scary, she notes, adding, "I answer any questions they have and tell them what to expect." Nurses may also benefit from shadowing a manager to learn more about the role.

"They gain a whole new appreciation as to what the role is about," says Sherman, who recommends taking time to identify the "bench strength" of their staff.

What leaders want to avoid is not responding to those interested in management.

Sherman says some participants in the nursing college's Emerging Nurse Leaders Master's Program "are having trouble even getting the attention of their leaders to think about things like putting them in charge."

Tap self-identified leaders

She suggests leaders ask themselves what actions they can take when a nurse self-identifies as a leader. "What opportunities can you provide them?"

Some managers are reluctant to give younger nurses responsibilities because they don't want to "offend" experienced nurses. But if these younger nurses don't see opportunity in the organization, Sherman says, they will move elsewhere. That would be a loss. Business research shows candidates who are internally developed and selected stay longer and are more productive.

"Successful organizations recognize the importance of internal development," she says.

Preparing future leaders

What's next after you identify a potential leader?

"Succession planning is not just identifying people but also having programs to develop people," says Lita Tsai, MA, RN, administrative manager of patient care ser-

vices at Kaiser Permanente Los Angeles Medical Center.

That includes formal and informal education and training, coaching, and mentoring.

Start preparing staff nurses for leadership by having them head projects and committees. Mercado credits unit-based teams that use shared governance with promoting leadership.

Smooth the transition

Smoothing the transition from staff nurse to manager increases the likelihood of success.

"I mentor them and am with them for the first month," says Mercado. "We're joined at the hip. They go to every meeting I go to and see every interaction I have. They really learn the role."

Once the new manager sees how something is done, such as chairing a meeting, Mercado lets him or her take on the new skill with her present as a backup. If all goes well, the manager is ready to fly solo. Mercado also sends staff to leadership programs Kaiser offers.

A coaching program

John Olmstead, MBS, RN, CNOR, FACHE, director of surgical services and emergency department at The Community Hospital in Munster, Indiana, has developed a Managing Partners Coaching Program (sidebar). The program outlines what managers need to know and helps them develop key skills.

In addition to weekly scheduled meetings with his managers, Olmstead says, "I work closely with them the first year."

He explains the nature of the job and has managers read policies and medical staff rules and regulations. Olmstead also discusses who does what in the department and helps managers learn what they need to know in their new role.

Creating a plan

Succession planning doesn't stop when the nurse enters the management track. Ongoing training is essential.

Mercado tends to move up nurses from charge nurse to the assistant department administrator position.

She notes that her director mentored her for her current position when Mercado was an assistant department administrator.

"She would give me opportunities like covering for her on vacation and special projects," Mercado says. "When it was time for me to move up, I was ready."

Mercado was recently chosen by Kaiser for "Leadership 380," a year-long leadership track that helps managers learn to become interdependent leaders.

Be creative with senior nurses

Olmstead says managers need to be creative with nurses who have "topped out" in their current positions, even if that means having them move to a position outside the OR. For example, an OR nurse educator who has excellent skills in quality management sees there isn't opportunity for her to grow because of low turnover.

The manager might try to find the nurse a position in the quality department. Although the OR would "lose" this nurse, he or she would stay with the hospital and be more satisfied.

He emphasizes that managers at all levels need to be part of succession planning. For instance, a nurse he recently promoted to a cardiac surgery team is already look-

Managing Partners Coaching Program

This comprehensive program by John Olmstead, MBS, RN, CNOR, FACHE, includes 2 parts.

Part 1: Education (what should be done)

During this 1- to 2-day period, the focus is on one-on-one time, covering the following sections:

- review the description of the manager position
- approach to the manager's position
- human resources instructions
- day-to-day personal habits of the successful manager.

Part 2: Action (how to do it)

This part takes 30 to 60 minutes per week until goals are reached.

During weekly conferences, the manager is coached on events of the past week and goals for the upcoming week.

The general agenda for the meetings includes:

- Review progress on agreed-upon goals for the week.
- Review incidents that arose during the week.
- Review goals for the week.
- Complete a progress report created between the manager coach and the new manager.

Source: Reprinted with permission from John Olmstead. The complete program is at www.managingpartnersllc.com/Services.html.

Hallmarks of successful succession planning

Ensure organizational commitment

Commitment starts with the board and CEO and continues through the staff. Lisa Tsai, MA, RN, cautions against outsourcing too much of succession planning to a consultant because the consultant will not know the organization as well as internal personnel.

Promote a healthy work environment

"If you have a healthy work environment, more than likely you will be thinking about succession planning because you know how important leadership is," says Rose Sherman, EdD, RN, NEA-BC, CNL, FAAN. "Look for people who can be authentic in that environment."

Identify successors early

Tap the successor before a current leader leaves. "Otherwise, you may get a leader by default and not have the best talent for the position," says Tsai.

Provide education on needed skills

New managers need new skills, such as budgeting. Education can also include attending conferences to see how national leaders function. The American Organization of Nurse Executives has 5 domains of

nurse executive competencies that can be helpful in ensuring new managers have the necessary skills. The domains include communication and relationship building, knowledge of health care environment, leadership, professionalism, and business skills.

Use coaches and mentors

"This is very important," says Tsai, and is congruent to what nurses have always done, such as precepting and leading by example. External mentors can work with a manager through phone calls or meetings.

Partner with human resources

The human resources department has to work with the entire organization and often has limited time to work on succession planning. The department may be particularly helpful in setting up leadership development programs.

Access resources

Resources include The Advisory Board, American Management Academy, and the American Organization of Nurse Executives.

ing for someone to be her apprentice. An assistant manager is working on identifying a nurse to fill her role when she retires.

Worth the effort

The good news is that succession planning benefits leaders too. "Mentoring staff into a management role is meaningful to me," says Mercado. "I had the same opportunity for mentorship, and I like giving it back to others." ❖

—*Cynthia Saver, MS, RN*

Have a question on the OR revenue cycle?

Keith Siddel will respond to questions in the column. Send your questions to editor@ormanager.com

You can also reach Siddel at ksiddel@hrmlc.com.