Staff Nurses
Create the
Nursing Strategic
Plan

Session # C-845
2:15pm-3:15pm, October 8th 2015

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TriHealth, Cincinnati, Ohio

Session Description

• Explore how a healthcare system successfully incorporated more than 100 staff nurses in the creation of the nursing strategic plan through nursing retreats and a strategic plan task force.

Session Objectives

• Discuss the need to involve nurses at all levels in the strategic planning process

• Describe a structure and process for creating a nursing strategic plan within a shared decision-making framework
TriHealth, Cincinnati, Ohio: Where We Are

- Two main hospitals & over 70 associated sites
- Formed in 1995 (merger of Good Samaritan and Bethesda)
- Community-based teaching hospitals
- 4 county service area in southwest Ohio
- 3100 nurses

TriHealth, Cincinnati, Ohio: Who We Are

- TriHealth
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TriHealth, Cincinnati, Ohio:  Who We Are

• Good Samaritan (1852):
  – 569 active beds
  – 5,984 Newborn Deliveries
  – 60 Level III NICU beds
  – 51 Critical Care beds (including Open Heart)
  – 30 Physical Rehab beds
  – 46 Behavioral Health (Adult and Gerontology)
  – Includes 1 free-standing ED and 6 outpatient infusion centers

TriHealth, Cincinnati, Ohio:  Who We Are

• Bethesda North (1970)
  – Satellite of original Oak campus (1896)
  – 436 active beds
  – 4,106 Newborn Deliveries
  – 12 Level II Special Care Nursery cribs
  – 32 Critical Care beds (including Open Heart)
  – 16 Physical Rehab beds
  – Level 3 Trauma center
  – Includes 2 free-standing EDs and 2 outpatient surgery centers

TriHealth, Cincinnati, Ohio:  Who We Are

• Magnet Designation 2012 (Bethesda & Good Samaritan Hospitals)
• 48% clinical nurses BSN
• 33.6% clinical nurses certified
• Nursing Management:
  • 80% certified, 48% with master’s degrees
• Average length of employment of clinical nurses - 11 years
TriHealth, Cincinnati Ohio: Growing….

Definitions

Shared Decision-Making

- Decentralized approach
- Four Cornerstone Principles
  - **Partnership**: interaction of all members of an organization with the goal of achieving desired outcomes
  - **Equity**: the integration of all members’ contributions; assures that every person’s opinion is equally valued.
  - **Accountability**: defines roles; clarifies contributions of and expectations for each person
  - **Ownership**: enables stakeholders to participate fully in decisions that affect the outcomes of their activities.

 Portug-O'Grady, 1995
Shared Decision-Making

- Empowers nurses from all levels and all areas to influence decisions and solve problems r/t
  - Patient & Family Centered Care
  - Nursing Practice
  - Professional Development
  - Quality & Safety
  - Fiscal Accountability
  - Nursing Research

Shared Decision-Making

- Benefits
  - Maximizes Resources
  - Enhances Teamwork
  - Promotes Collegial Relationships
  - Creates Positive Environment

*Shared decision-making supports TriHealth's vision of nursing excellence through innovative leadership*

Strategic Plan

- Base of Shared Decision-Making
- Tool for organizing present based on projections of desired future
- Guides direction of an organization or group
- Roadmap to the future
Strategic Plan

• Assists in priority setting
• Should be flexible & practical
• Balances…

Strategic Plan

TriHealth Nursing Strategic Plan
• Built on five Magnet® components
  – Transformational Leadership (TL)
  – Structural Empowerment (SE)
  – Exemplary Professional Practice (EP)
  – New Knowledge, Innovations, & Improvements (NK)
  – Empirical Outcomes
    • All initiatives require SMART goals
    • Pre- & post-initiative measurement to show initial improvement & sustained benefit

Appreciative Inquiry
Appreciative Inquiry

Define:
• Choose a positive topic
  – ‘Nursing at TriHealth’

Discover:
• Ask about the ‘best of what is’
• What is working now?

Appreciative Inquiry

Dream:
• Imagine ‘what could be’
• What is the future?

Design:
• Plan ‘what will be’
• How do we achieve the dream?

Deliver:
• Create goals & implement strategies

Nursing Strategic Plan Process
Nursing Strategic Plan Timeline

Nursing Retreat

- Full-day, off-site event
  - Educational
    - Inspirational
    - Team-building
    - Engaging
- Presentations
- Team Activities
- Brainstorming Sessions

Nursing Retreat

Sample Agenda from March 2015 Nursing Retreat

Event planned and facilitated by shared decision-making Nursing Retreat Planning Committee
Nursing Retreat

Participants:

November 2013 Nursing Retreat:
- 108 Staff Nurses
- 117 Formal Nurse Leaders
- 6 Non-Nurse Leaders
- 231 Total Participants

March 2015 Nursing Retreat:
- 121 Staff Nurses
- 146 Formal Nurse Leaders
- 14 Non-Nurse Leaders
- 281 Total Participants

Nursing Retreat 2013

Nursing Retreat Strategic Plan Activity

November 2013 Nursing Retreat
- 18-month “Mid-Plan Check” for FY13-15 Plan
- Council Co-Chair led table brainstorming, 90 minutes
- Current Strategic Plan items; focus on those not yet started
**Nursing Retreat Strategic Plan Activity**

March 2015 Nursing Retreat
- Brainstorming for FY16-18 Plan
- 90-minute session
- "Discover" & "Dream" aspect of Appreciative Inquiry
- Tied into Legacy theme of Retreat
  - "What is the legacy we want to leave for the next generation to build upon?"
- Based brainstorming on Magnet© Components; divided out by tables

**Strategic Plan Task Force**

- Before & After Nursing Retreat
  - 1-2 meetings before Retreat
  - 5-6 meetings after Retreat (90 min.)
- Purpose:
  "To create a Strategic Plan that will serve as a road map to lead TriHealth Nursing from where it is now to where it would like to be in three (3) years"

**Strategic Plan Task Force: Membership**

Advisors: 2 site CNOs & System CNE (1st meeting only)
Facilitators: 2 Professional Excellence Specialists
Members at Large:
- 9 Staff RNs (Unit Shared Leadership Committee Co-Chairs)
- 2 Directors
- 2 Nurse Managers
- 1 APN/Educator
- 1-2 Co-Chairs from each Council (Operations, Practice, Research, Quality, Education); some are also staff nurses
  
  Goal = 20-25 with ~1/2 Staff RNs
Strategic Plan Task Force: Process

Task Force Rules

• Respect others. Listen. Value all opinions.
• Positive Attitude.
• Full group participation. Turn off phones, close laptops.
• Silence denotes agreement

Strategic Plan Task Force: Process

Appreciative Inquiry Process

• Focus on the positive
• Recognize strengths
• Create a preferred future
• Identify ways to build the future
• Implement processes to reach the dream

Strategic Plan Task Force: Process

Define:
• Purpose
• Task force rules

Discover:
• Brainstorm TriHealth nursing division strengths; What do we do well?; build upon strengths
Strategic Plan Task Force: Process

Dream: What could we be???

Design:
• Discovery + Dream + Nursing Retreat
  Feedback = Nursing Strategic Plan
• Takes several meetings to formulate rough draft

Deliver:
• Takes us into “Next Steps” section

Strategic Plan Task Force: Sample Agenda
(Before Nursing Retreat)
Strategic Plan Task Force: Sample Agenda
(After Nursing Retreat)

<table>
<thead>
<tr>
<th>Time</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00</td>
<td>Greet colleagues</td>
</tr>
<tr>
<td>9:00</td>
<td>Discuss Nursing Leadership Council Structure</td>
</tr>
<tr>
<td>10:00</td>
<td>Review Nursing Strategic Plan</td>
</tr>
</tbody>
</table>

Next Steps

“Deliver” in the Appreciative Inquiry Process

Nursing Leadership Council

Membership:
- Council co-chairs, directors, CNOs, CNE, Nursing Project Coordinator, MPDs

Purpose:
- Coordinates the work of the councils; oversees SDM processes; facilitates Nursing Strategic Plan
Nursing Leadership Council

After Nursing Retreat & Strategic Plan TF:
• Leadership Council members review draft of Nursing Strategic Plan
• Leadership Council edits, as needed
• Council co-chairs take to council members & reporting committees and determine any suggested changes (~2 months)

Nursing Strategic Plan: Sample Page

Leadership Council Approval:
• Council co-chairs report recommendations from council and reporting committees at next Leadership Council meeting
• Leadership Council discusses recommendations; edits Strategic Plan, as needed; approves final version
• Final version posted to shared U-drive, accessible by all
Nursing Strategic Plan: Sample Council Input

Nursing Strategic Plan – Ongoing updates

Quarterly Updates:
- Council Co-Chair provide verbal updates at each bi-monthly Leadership Council
  - Includes work of reporting committees
- Council Co-Chair submits written quarterly updates to Professional Excellence Specialists (MPDs)
  - Includes work of reporting committees
Sharing of Accomplishments
TriHealth Annual Nursing Report

• TriHealth Board Report
  – Annual presentation to Board of Directors
  – By CNE/CNO team
  – End of each fiscal year (late summer)
  – Selected highlights of nursing strategic plan accomplishments
• Medical Executive Committee
  - CNE/CNO annual update
  - Selected accomplishments from nursing strategic plan

Sharing of Accomplishments
Nursing Connections
Sharing of Accomplishments

Mandatory Quarterly Education Packet: Council & Committee Updates

Sharing of Accomplishments

Nursing Forum: Council Updates

References & Resources

References:

Resources:
- TriHealth Nursing Annual Report 2014
- TriHealth Nursing Strategic Plan FY13-15
- TriHealth Nursing Strategic Plan FY16-18
Contact Information

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