

# Staff Nurses Create the Nursing Strategic Plan



**Session # C-845**  
2:15pm-3:15pm, October 8<sup>th</sup> 2015

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& Nancy Carter BSN, RN, OCN  
TriHealth, Cincinnati, Ohio

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## 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.

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## 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

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**TriHealth, Cincinnati, Ohio: Where We Are**



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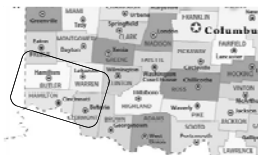
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**TriHealth, Cincinnati, Ohio: Who We Are**

- TriHealth
  - 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



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**TriHealth, Cincinnati Ohio: Who We Are**



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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

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**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

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**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

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### TriHealth, Cincinnati Ohio: Growing....



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### Definitions

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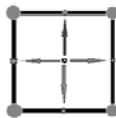
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### Shared Decision-Making

- 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.



(Porter-O'Grady, 1995)

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**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



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**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*

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**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



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**Strategic Plan**

- Assists in priority setting
- Should be flexible & practical
- Balances...



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**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



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**Appreciative Inquiry**



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**Appreciative Inquiry**

Define:

- *Choose a positive topic*  
– ‘Nursing at TriHealth’



Discover:

- *Ask about the ‘best of what is’*
- *What is working now?*

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**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*

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**Nursing Strategic  
Plan Process**

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**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



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**Nursing Retreat 2013**



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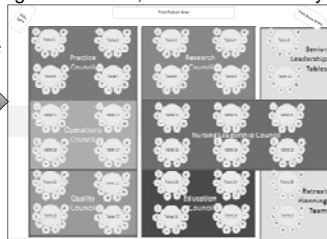
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**Nursing Retreat Strategic Plan Activity**

**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

Table Divisions  
by Council



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### 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



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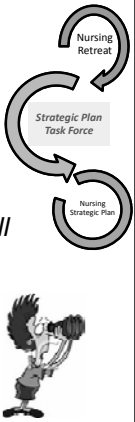
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### Strategic Plan Task Force

- 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”*



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### Strategic Plan Task Force: Membership

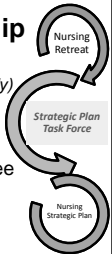
**Advisors:** 2 site CNOs & System CNE (1<sup>st</sup> meeting only)

**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**



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**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*



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**Strategic Plan Task Force: Process**

**Appreciative Inquiry Process**



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**Strategic Plan Task Force: Process**

**Define:**

- Purpose
- Task force rules

**Discover:**

- Brainstorm TriHealth nursing division strengths; What do we do well?; build upon strengths



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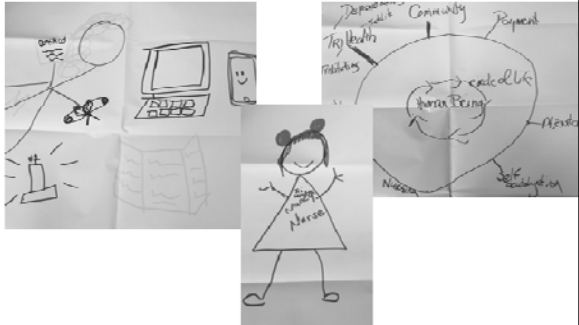
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**Strategic Plan Task Force: Process**

Dream: What could we be???



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**Strategic Plan Task Force: Process**

Design:

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

Deliver:

- Takes us into "Next Steps" section



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

# TriHealth

## AGENDA

Meeting Title: Strategic Plan Task Force  
Date: November 12, 2014

Facilitator: Deb Mulline and Sharon Broden  
Place/Time: 4000 Kibben Court Center-A, 1:00-4:00

### Components of Excellence

Transformational Leadership (TL) Strategic plans, improve, leader development, effectiveness / self-aware, leader acceptance	Behavioral Engagement (BE) Self-motivation to develop, education & certification, community involvement, recognition	Empathy/Professional Practice (EP) "Living for others" - mission, care delivery, quality & safety, interdisciplinary care, standards, diversity, patient-centered, staff involvement, budgets, staffing, prior review	New Knowledge, Innovation, & Engagement (NKE) Research, EBP, dissemination of projects, research, innovation
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Time	Topic	Leader	Activity Code	Excellence Code	Desired Outcomes (consider measurement method)
2:30p	Reflections	Deb / Sharon	I	TL	
2:45p	Get to know you!	Deb / Sharon	C	TL	
2:45p	Review of previous meeting outcome & activities Define and Discover	Deb / Sharon	L, C, D	BE	Guiding Principles established Appreciative inquiry described (Define & Discover)
3:45p	Discover: quest 2 - Who we are now I talk activity & discussion And: Dream...	Deb / Sharon	L, C, D	TL, BE	4th commitment: "What don't we want to lose?" "What is established is revised, accountability?" Jump / drop / modify current initiatives.
4:00p	Plan for Retreat activity	Deb / Sharon			Previous activities reviewed.
4:25p	Next meeting: 17th January 1:00p / 4:00-4:45pm, GBB, 4000 Kibben Court-C				

Components of Excellence Codes:

TL, BE, EP, NKE

Activity Codes:

I = Information  
C = Conversation

D = Decision  
L = Learning

P = Problem Solving  
P = Problem Solving

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

# TriHealth

## AGENDA

Meeting Title: Strategic Plan Task Force  
Date: March 25, 2015

Facilitator: Deb Mallone and Sharon Brown  
Place/Time: B301, Courts classroom, 7:30-8:40 AM

### Components of Excellence

Preventative/ Leadership (P)	Strategic Engagement (SE)	Healthcare Improvement (HI)	Research, Innovation, & Measurement (RIM)
Strengths gaps, resources, needs, development, effectiveness, efficiency, future, accountability	"We're going to be successful" in our vision, mission, and strategic plan. We're all in it together. We're all committed to the same goals. We're all committed to the same values. We're all committed to the same standards. We're all committed to the same excellence. We're all committed to the same excellence. We're all committed to the same excellence.	"We're going to be successful" in our vision, mission, and strategic plan. We're all in it together. We're all committed to the same goals. We're all committed to the same values. We're all committed to the same standards. We're all committed to the same excellence. We're all committed to the same excellence. We're all committed to the same excellence.	Research, Innovation, & Measurement (RIM)

Time	Topic	Leader	Activity / Game	Excellence Code	Desired Outcomes (consider measurement method)
7:30p	Reflections & Introductions	DWB / Sharon	I	TL	
7:40p	Overview Strategic Plan	DWB / Sharon	C	JL	
7:45p	Review/Goaling Philosophical Approach/ Review	DWB / Sharon	L	C, D	KE
7:55p	Discussion (part 1) - Review action and recommendations from session	DWB / Sharon	L, C, B	TL, SE	Update current draft of Plan. Add new initiatives to current draft.
8:10p	Discussion - Review recommendations from session	DWB / Sharon			Update current draft of Plan. Add new initiatives to current draft.
8:35p	Next Steps: April 11, 7:30-8:40pm B301 Court April 12, 12:40-2:40pm B301 Court April 13, 2:30-4:30pm B301 Court May 18, 7:30-8:40pm B301 Court				

Components of Excellence Codes:	Activity	I = Interim	E = Endgame	C = Core	R = Research	L = Leadership	S = Strategic	T = Team	B = Business	SE = Strategic Engagement	HI = Healthcare Improvement	TL = Total Leadership	KE = Knowledge Excellence
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## 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)



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**Nursing Strategic Plan: Sample Page**

YriHealth Nursing Goals & Priorities – FY2016 through FY2018						
Strategic Components and Strategies support the achievement of our Nursing Vision: Excellence in patient and family-centered care through commitment to compassionate, professional nursing practice.						
Strategy (Initiative and associated key results to meet Strategic Component)	Evidence of addressing key strategies of nursing excellence	SMART Goals with outcomes measures to address and improve strategic components	Quarterly Status (Include date of update. Only include items that describes immediate items, all due dates and measured outcomes related to goals)	Council Quarterly	Priority (Y/N)	US Target (Y/N/%)
Strategic Component: Transformational Leadership						
N.1.1 - N.1.3 Advocacy and Influence	In N.1.1: continuous improvement in nursing development at all levels of nursing (staff nurse, charge nurse, APRN and educators, APNM/Managers, Directors, etc.)	N.1.1.1: periodically evaluate the feasibility of creating new Charge Nurse roles for new charge nurses and/or standardize charge nurse orientation by....		UC	Y	
		N.1.1.4: evaluate process for staff to schedule time to participate in courses/conferences and to complete mandatory education. Determine needed actions organizationally to improve participation.		OC, LC	Y	
		N.1.1.5: Assess and implement requirements as prerequisite for new hires into management, including transfers by....		OC, EC	Y	
N.1.2 - Continuous Improvement in monitoring activities at all levels of nursing.		N.1.2.1: implement formal management and charge nurse specific mentoring program by....		OC	Y	

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**Nursing Leadership Council**

**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



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Nursing Strategic Plan: Sample Council Input

TriHealth Nursing Goals & Priorities – FY2014 through FY2018						
July 2, 2013 – June 30, 2018						
Strategic Components and Strategies support the achievement of our Nursing Vision:						
Excellence in patient and family-centered care through commitment to engagement, professional nursing practice						
Strategy (Strategic Component or related focus element)	Initiative (Addressing excellence)	SMART Goals with outcome measures to address and improve strategic component	Quarterly Status (Required Date of update: Only include dates that describe breakthrough items, unique projects and measurable outcomes related to goals)	Council Owner(s)	Priority (H/L/N)	LN Rating (Y/N/NA)
TL 1. TL 1.7 Advocacy and Influence	TL 1.7.1: Continuous engagement in leadership development at all levels of nursing (staff nurses, charge nurses, APRNs and educators, Nurse Managers, Directors, CNOs)	Strategic Component: Transformational Leadership				
		TL 1.7.1.1: Appoint/evaluate the effectiveness of nursing time Change Nurse series for new charge nurses and/or identification charge nurse candidates by...		OC	Y	
		TL 1.7.1.2: Evaluate process for staff to participate in leadership development and/or continuous education Determine needed actions organizationally to improve process by...		OC, LC	Y	
		TL 1.7.1.3: Assess and implement improvements in education for new hires into management, including transitions by...		OC, BC	Y	
	TL 1.7.2: Continuous engagement in mentoring activities at all levels of nursing	TL 1.7.2.1: Implement formal mentoring and Charge Nurse series/mentorship program by...		LN	Y	
		TL 1.7.2.2: Assess and implement mentorship support program for charge nurses to support staff Nurse and Educators by...		Ad	N	

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



Nursing Strategic Plan – Ongoing updates

TriHealth Nursing Goals & Priorities – FY2013-2015 ***FY2014 - Research***						
Strategic Components and Strategies support the achievement of our Nursing Vision:						
Excellence in patient and family-centered care through commitment to engagement, professional nursing practice						
Strategy (Strategic Component or related focus element)	Initiative	Outcome measures (SMART Goals - Addressed by council owner)	Quarterly Status (Required Date of update: Only include dates that describe breakthrough items and unique projects)	Council Owner(s)	Priority (H/L/N)	LN Rating (Y/N/NA)
Advocacy and Influence TL 1.7.1	Strategic Component: Transformational Leadership					
	TL 1.7.1.1: Appoint/evaluate the effectiveness of nursing time Change Nurse series for new charge nurses and/or identification charge nurse candidates by...	TL 1.7.1.1.1: Appoint/evaluate the effectiveness of nursing time Change Nurse series for new charge nurses and/or identification charge nurse candidates by...		OC	Y	
Advocacy and Influence TL 1.7.2	Strategic Component: Transformational Leadership					
	TL 1.7.2.1: Implement formal mentoring and Charge Nurse series/mentorship program by...	TL 1.7.2.1.1: Implement formal mentoring and Charge Nurse series/mentorship program by...		LN	Y	

**Sharing of Accomplishments**

**TriHealth Annual Nursing Report**



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**Sharing of Accomplishments**

- 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

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**Sharing of Accomplishments**

**Nursing Connections**



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**Contact Information**

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