



TL7 – Advocacy and Influence

TL7: Choose three of the following (one example must be from ambulatory care setting, if applicable):

Introduction

KFSHRC-J defines succession planning as “a process by which high potential employees are identified, selected, and formally developed to assume leadership and/or management roles” (Nursing Affairs Professional Development Plan, 2021, p. 19). Succession planning is linked to key performance indicators such as Saudization. The broad goal is to ensure leadership and service continuity and stability by identifying key positions and arranging for continuous coverage of those positions. Nursing Affairs recognizes that succession planning does not pre-determine an employee to take a future position. Rather, it provides an opportunity for professional development and growth for specific individuals through activities such as taking delegated responsibilities for specific roles, formal leadership development, mentoring, and shadowing. Succession planning should be flexible and adaptable to accommodate the varying needs of different units/departments. Nursing Affairs is committed to succession planning goals and has developed and implemented a targeted succession planning framework, see Table TL7.1 *Nursing Affairs Succession Planning Framework*. In addition, Nursing Affairs also has a succession plan in place for all positions at Grade 9 and above.



Figure TL7.1: Nursing Affairs Succession Planning Framework

TL7a: Provide one example, with supporting evidence, of succession-planning activities for the nurse manager role.

Introduction

The nurse manager's role is a role in which succession planning is necessary. The succession planning framework is intended to provide a general method to help nurse managers to identify, select, assess, and develop future nurse leader-managers within their nursing units/departments. Within Nursing Affairs, Program Directors work closely with nurse managers known as Head Nurses within their areas, utilizing the Succession Planning Framework (Professional Development Plan, 2017, P. 18) to identify, assess, and select interested clinical nurses for mentorship and potential secondment into the role. Selection is based on a pre-assessment to ensure they meet the role requirements to be considered for mentorship and secondment, with a potential opportunity for career advancement in the future. **Evidence TL7a.1 Nurse Manager Competency Assessment**

Ambulatory Care Example TL7a: Reem Baljoon, MSN RN, Succession Plan from Nurse Clinician to Nurse Manager Role

In December 2018, Reem Baljoon, MSN RN, Nurse Clinician, Day Procedure Unit (DPU), requested nurse leadership and management coaching from her manager Riitta Antikainen, BSN RN, Head Nurse, DPU, and Wadea Beheri, PhD RN, Deputy Executive Director, Nursing Affairs (DED, NA). Based on Reem's professional interest and goals, clinical performance, and demonstrated leadership skills in her current position, she was identified for leadership development and supported by a leadership coach, Diane Ross, MSN RN, Head Nurse, Surgical unit. Over the proceeding months, coaching was progressing, but there was a concern that there was limited time Reem could spend with her coach due to the demands of her current position in DPU. After communicating her challenges to her manager, Riitta, and to Dr. Beheri, Reem was recommended for a one-year secondment to the Surgical unit into an Assistant Head Nurse position.

Succession Planning

Dr. Beheri and Diane met with Reem on May 28, 2019, and a plan was agreed upon to assign Reem to the Surgical unit in the role of Assistant Head Nurse from July 14, 2019, until July 13, 2020, so that she could work more closely with her leadership coach Diane. They decided on an Individual Development Plan (IDP) specific to Reem's needs, including enhancing her skills, knowledge, and behaviors through leadership development under the responsibility and direction of Diane. This would assist Reem in her succession planning to a Head Nurse role. **TL7a.2 Succession Planning Meeting Minutes 28-05-2019; Evidence TL7a.3 Individual Development Plan**

Leadership Development

Reem was also given the opportunity to attend leadership and management courses when the opportunity arose. Such courses included:

- Emotional Intelligence Course, April 2019
- Supervisory Course, September 2019
- Project Management Course, September 2019

TL7a.4 Leadership Development Certificates

The IDP was comprehensive, including but not limited to managerial, practice, skills, knowledge, interaction, communication, and behaviors. However, as Reem had previous experience in leadership and had acquired two Master's degrees over six years, an individualized approach was taken to support her to achieve all the requirements of this program.

All assessment tools and competencies used were designed using KFSHRC General Organization job descriptions for Head Nurse/Assistant Head Nurse, performance evaluation, and the Association of Nurse Executives Competencies for Nurse Managers as valuable resources. In September 2019, Reem completed the Nurse Manager Competency Assessment Tool. Reem's assessment was reviewed with Diane, and based on Reem's assessment, goals and objectives were set with a focus on areas that Reem felt she needed further development.

In addition to focusing on achieving the set goals related to her self-assessment, specific activities were created to help Reem get the most out of her secondment experience throughout the 12 months. An office workspace was set up for Reem in Diane's office to enable her to work closely with Diane in all daily unit activities and projects. This allowed Reem the opportunity for daily coaching, observation of skills, and direct feedback to help her grow and develop.

Reem reached a level of proficiency in all behavioral, clinical, and leadership competencies by April 2020. The responsibilities delegated and performed independently by Reem were as follows:

- Staffing and schedule planning and updating Oracle and Clarivia Applications Manager
- Monitoring/managing daily overtime needs and completing monthly overtime utilization reports
- Monitoring unit key performance indicators (KPIs) and developing action plans with the Unit Council
- Facilitating evidence-based practice (EBP) performance improvement projects
- Conducting safety huddles and patient satisfaction rounds
- Following up on stock, supplies and equipment issues with the unit storekeeper

- Conducting daily census reports with charge nurses
- Following up on incident reports (known as QIS) and patient complaints
- Following up on staff performance issues and conducting staff mid-year evaluations
- Recontracting staff and leading staff retention activities
- Conducting staff counseling sessions using the Just Culture algorithm

Diane evaluated Reem regularly, and Dr. Beheri reviewed her development to ensure progress and goal attainment. A written evaluation was documented in Reem's IDP on the following dates:

- October 10, 2019
- December 05, 2019
- April 15, 2020
- June 15, 2020 (Final Review)

Successful Succession Planning Outcome

Reem's succession plan was completed on June 15, 2020. Her succession plan was multifaceted, including opportunities for mentorship, secondment, and attendance of numerous leadership and management courses. Reem was promoted to Head Nurse 5N-Medical unit, approved by the Accreditation and Credentialing Committee (ACC) on March 03, 2021.