



# **METHODOLOGY FOR HOW TO USE THE INVENTORY TOOL**

- I. The Nurse Manager uses the Inventory Tool to review and rate themselves in each of the content areas, along a scale from Minimal Skill/Experience to Expert.**
- II. The Nurse Manager's Supervisor does the same, rating the Nurse Manager in their specific role.**
- III. The Nurse Manager & Supervisor meet to review the two assessments. For areas where assessments differ they can:**
  - a. Discuss why the perceptions differ**
  - b. Discuss and develop plans for improvement/ professional development**
- IV. This Inventory tool can become the basis for career pathway planning and delineating professional targets.**



# THE SCIENCE: MANAGING THE BUSINESS

Novice  
Experience/  
Skill

Competent  
Experience/  
Skill

Expert  
Practice

## I. FINANCIAL MANAGEMENT

1. Understanding of healthcare economics & healthcare public policy as it applies to the delivery of patient care – Includes reimbursement, Medicare, Medicaid, managed care, third party providers, challenges to the current healthcare policies, key legislative initiatives at local, state and national level.

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2. Unit/Department based budgeting – Includes development methodologies, report formats, analysis rules, “how to read a report,” balance sheets and cost report interpretation.

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◆ Creating a budget

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◆ Monitoring a budget

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◆ Analyzing a budget

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◆ Reporting on budget variance

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◆ Revenue forecasting

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◆ Expense forecasting

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◆ Interpreting financial information

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3. Concepts of capital budgeting – Includes financial definitions for capital categories, depreciation; justification and ROI (Return on Investment) and ROA (Return on Asset).

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◆ Cost-benefit analysis (e.g. new program assessment, purchase vs lease options)

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## II. HUMAN RESOURCE MANAGEMENT

1. Recruitment techniques – Includes an understanding of institution's recruitment strategies & initiatives, various alternatives, competition, marketing of facility/unit/department.

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2. Interviewing techniques – Includes individual and team interviewing, skills/techniques and “key success criteria” interviewing programs.

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3. Labor laws pertaining to hiring – Includes state scope of practice laws, and federal and state HR laws, such as family medical leave.

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4. Hiring policies and procedures from the facility HR Department.

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◆ Identification of key skills and attributes for each role.

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◆ Ability to implement changes in roles based on changing department and health care environment needs.

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5. Orientation of new employees – Includes development and implementation of appropriate plans for each employee.

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### III. PERFORMANCE IMPROVEMENT

1. Knowledge of Continuous Quality Improvement (CQI)/Total Quality Management (TQM) processes – Includes CQI, TQM, Six Sigma, Balanced Scorecards, or whatever model is used to measure quality and outcomes in the facility. Also includes quality improvement tools such as pareto charting, control charts, workflow charting, and process charting.
2. Patient safety – Includes sentinel event monitoring and reporting, root cause analysis, JCAHO requirements, incident reporting, medication safety policy/procedures.
3. Workplace safety -Includes knowledge of regulatory requirements (Department of Public Health, JCAHO, OSHA, etc.)
4. Promoting intradepartmental/interdepartmental communication

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### IV. FOUNDATIONAL THINKING SKILLS

1. Systems thinking knowledge as an approach to analysis and decision-making.
2. Complex adaptive systems definitions and applications.
3. Understanding organization behaviors — Includes planning, organizing, and leading. Also includes four skills essential in influencing nursing practice: self-awareness, dialogue, conflict resolution and navigating change.
4. Decision making skills – Includes use of data driven decision making profiles/models.
5. Problem solving skills – Includes defined models for problem solving.

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### V. TECHNOLOGY

1. Basic computer skills – Includes word processing, & data management, Internet/Email, skills to access information as it applies to facility information systems.
2. Information technology – Includes an understanding of the effect of IT on patient care and delivery systems to reduce work load (i.e. bar coding, processing patient charges, understanding of master and patient billing computerized physician order entry (CPOE), staff scheduling program)
  - a. Knowledge of the patient medical record utilized in the institution
  - b. Knowledge of the supply/medication management systems utilized in the institution

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- c. Ability to integrate technology into patient care processes
- d. Using information systems to support business decisions

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## VI. STRATEGIC MANAGEMENT

1. Project management – Includes understanding roles, timelines milestones, and resource utilization. Ability to develop (or participate in the development of) a project plan.
2. Business development – Includes knowing the content of a business plan.
3. Business plan development – Includes the ability to create a business plan for specific projects.
4. Presentation skills
  - a. Written – Includes reports, program descriptions, evaluations and correspondence.
  - b. Oral – Includes educational presentations, project presentations, media and meetings skills.
5. Persuasion skills – Includes influencing/selling skills.
6. Developing strategic plans – Includes various methodologies for strategic planning, such as scenario planning, environmental scanning.
7. Developing operational plans – Includes annual tactics that support and move the unit/department to accomplish a strategic plan.

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## VII. APPROPRIATE CLINICAL PRACTICE KNOWLEDGE

(Determined by specific role and institution) – Each role and institution has expectations regarding the clinical knowledge and skill required of the role. These expectations should be established for the specific individual based on organizational requirements.

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# THE ART: LEADING THE PEOPLE

## I. HUMAN RESOURCE LEADERSHIP SKILLS

1. Performance management – Includes staff annual evaluation, goal setting, continual performance development, “crucial conversations,” corrective action and disciplinary processes, termination.
2. Staff development — Includes staff education/needs assessment, education programming, competency assessment (recommendations and development).
3. Succession planning- Includes developing leadership capacity of staff.
4. Coaching and guiding skills – Includes demonstrating behaviors and role modeling.
5. Mentoring – Includes modeling behaviors of leadership and developing staff as mentors.

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## II. RELATIONSHIP MANAGEMENT & INFLUENCING BEHAVIORS

1. Communication skills – Includes active listening, feedback, inquiry, validation.
2. Emotional IQ – Includes how well you know yourself and how you relate effectively with your environment.
3. Self awareness – Understanding one’s values, beliefs, and attitudes and how they affect your responses and behaviors.
4. Effective use of dialogue – Understanding and practicing the process to encourage the free flow of ideas within groups to discover insights and lead to shared meaning.
5. Team dynamics – Understanding the functions of group process. Able to facilitate effective groups, both for nursing and intradisciplinary/multidisciplinary groups.
6. Collaborative practice – The presence of trust, respect and good communication among colleagues. How well is this developed and supported?
7. Conflict management – Understanding the process to work through opposing views in order to reach a common goal. Skill in conflict resolution.
8. Negotiation – Using conflict resolution techniques to maintain collaboration: isolate the facts, ask clarifying questions, reach common ground, interpret what is said verbally and with body language. Includes the use of “crucial conversations”.

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9. Mediation – Use of a neutral party to help reach resolution.  
Skill in functioning as a mediator.

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### III. DIVERSITY

1. Cultural competence – Includes understanding the components of cultural competence as they apply to the workforce.
2. Social justice – Includes maintaining an environment of fairness and processes to support it.
3. Generational diversity - Ability to capitalize on differences to foster highly effective work groups.

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### IV. SHARED DECISION MAKING

1. Includes understanding the structure and processes of shared governance.
2. Implementation of shared decision-making structures and processes on the unit.

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## THE LEADER WITHIN: CREATING THE LEADER IN YOURSELF

Novice  
Experience/  
Skill

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Practice

### I. PERSONAL & PROFESSIONAL ACCOUNTABILITY

1. Personal growth & development – Includes education advancement, continuing education, career planning, and annual self-assessment and action plans.
2. Ethical behavior and practice – Includes practice that supports nursing standards and scopes of practice.
3. Professional association involvement – Includes membership & involvement in an appropriate professional association that facilitates networking and professional development.
4. Certification – Achieving certification in an appropriate field/specialty.

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## II. CAREER PLANNING

1. Knowing your role – Understanding current job description/ requirements and comparing those to current level of practice.
2. Knowing your future – Planning where you want to go in your career and what you need to get there. What are the needs of healthcare in the future and where will you fit?
3. Positioning yourself – The development of a career path/plan for yourself that provides direction while offering flexibility and capacity to adapt to future scenarios.

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## III. PERSONAL JOURNEY DISCIPLINES

These skills assist in developing the individual strengths of a leader.

1. Shared leadership/council management – Includes knowledge of and skill in managing councils that promote shared leadership.
2. Action Learning – Includes use of techniques of “Action Learning” to problem solve and personally reflect on decisions.
3. Reflective Practice – Includes knowledge of and active practice of reflection as a leadership behavior.

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## IV. REFLECTIVE PRACTICE REFERENCE BEHAVIORS/ TENANTS

Utilizing a set of guidelines and tenants that facilitate reflective practice. These may be individually developed or can be based on specific models developed by others. Below are the Dimensions of Leadership developed by the Center for Nursing Leadership, which offer an example of a set of guidelines/tenants that can be used as a tool to guide personal reflection of an individual's leadership behaviors.

1. Holding the truth – the presence of integrity as a key value of leadership.
2. Appreciation of ambiguity – Learning to function comfortably amid the ambiguity of our environments.
3. Diversity as a vehicle to wholeness – The appreciation of diversity in all its forms: race, gender, religion, sexual orientation, generational, the dissenting voice, and differences of all kinds.
4. Holding multiple perspectives without judgment – Creating and holding a space so that multiple perspectives are entertained before decisions are rendered.
5. Discovery of potential – The ability to search for and find the potential in ourselves and in others.
6. Quest for adventure towards knowing – Creating a constant state of learning for the self as well as an organization.

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## Expert Practice

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