

FOURTH EDITION

# Leadership in Nursing Practice

The Intersection of Innovation and Teamwork  
in Healthcare Systems



# The Andragogy

## **Leadership in Nursing Practice: Changing the Landscape of Health Care, Fourth edition**

drives comprehension through various strategies that meet the learning needs of students while also generating enthusiasm about the topic. This interactive approach addresses different learning styles, making this the ideal text to ensure mastery of key concepts. The andragogical aids that appear in most chapters include the following:

I have an almost complete disregard of precedent, and a faith in the possibility of something better. It irritates me to be told how things have always been done. I defy the tyranny of precedent. I go for anything new that might improve the past. —Clara Barton

### CHAPTER OBJECTIVES

Upon completion of this chapter, the reader will be able to do the following:

- › Describe the nature of change and innovation in a complex environment.
- › Compare and contrast principles of innovation and performance improvement.
- › List techniques to assist in the development of change and innovation competence.
- › Define the essential competencies and behaviors for effective change and innovation.
- › Enumerate specific strategies to embrace change.
- › Develop an understanding of the processes for overcoming obstacles to change and innovation.
- › Identify the purpose and essential elements of a contemporary business case for advancing quality using change and innovation principles.

## Chapter Objectives

Chapter objectives provide instructors and students with a snapshot of the key information they will encounter in each chapter. They serve as a checklist to help guide and focus study.

## Reflective Questions

Reflective questions, found throughout the text, prompt students to stop and reflect on what they have learned.

### REFLECTIVE QUESTION

In the 1800s, nurses like Florence Nightingale and Clara Barton believed nurses no longer wanted to accept things the way they were; instead, they wanted to learn from past mistakes and improve the future of nursing. Do you think this is the overall feeling of nurses today? Why or why not? Describe facilitators and/or barriers to your rationale.

and innovation as a primary requisite for participating in change work. In an environment filled with both obstacles to and facilitators of change and innovation, there is no escaping the reality of change.

High-performing organizations are competent in two types of change: innovation and performance improvement. Leaders must be competent in knowing how these two types of change create desired outcomes. Leaders must also understand that it is not a question of "either/or" but of "and." Innovation AND performance improvement are needed in high-performing organizations. They create a dynamic that allows for novelty and refinement. In a value-based system, this dynamic is the engine by which organizations will become and remain sustainable.

As individuals become comfortable with the notion of embracing change and innovation, it is equally important to recognize that not all change is urgent or value laden. Some good ideas do not need to be implemented—unless there is evidence and rationale for making the change.

## The Centrality of Accountability—Becoming a Professional Nurse

Perhaps there is no greater challenge to professional performance and impact than the personal expression of accountability. Accountability is the cornerstone of professional expression (Tilley, 2008). Some scholars suggest that it is the essential foundation of professional practice, such that one cannot be a professional without it. There is little doubt that accountability is the best indicator of whether professional behaviors are at work in the clinical environment.

Accountability is not as amorphous and ambiguous a notion as many are led to believe. In fact, accountability is a very precise notion with particular characteristics that mark it as a unique expression of human action (Connors, Smith, & Hickman, 2004). Three essential characteristics dictate the content of accountability and are essential to its definition—autonomy, authority, and competence.

## Critical Thoughts

Critical Thought boxes, found throughout the text, summarize and expand upon what students have read.

Who, Why, What, When, and How of Change 39

categories: advancing the organization, developing skills, mandatory reporting, and whistleblowing.

Advancing the organization, the first category of rational risk-taking, is about learning to thrive and survive in the organization. Challenges in providing patient care, as well as the external introduction of new ideas, need to be considered carefully and regularly. New clinical interventions, new programs, expansion of existing services, selection of equipment, and prioritization (what comes first) are common challenges. Choices that are rational and minimize risk are those that are made on the basis of the organization's core values, respect for others, the safety of individuals, strategic goals, and available resources. The risk in proposing new ideas and challenges is that the new ideas might be rejected or dismissed. Learning to thoughtfully propose new ideas with a well-developed rationale at the right time is a basic requirement for all nurses.

Developing skills is the second rational risk-taking category. Regardless of their current competence levels, all individuals need to learn new skills to continue to be effective in the ever-changing healthcare environment. Acquiring new knowledge and skills that are rational includes learning skills specific to the job role and developing personal preferences to support the role in the most robust

### SCENARIO

**Trust** implies that one individual is vulnerable to the actions of another. The greater the trust, the stronger the expectations are that individuals will consider others' intentions and actions based on established roles, relationships, experiences, and interdependencies.

Trust is one individual's willingness to be vulnerable to another based on the belief that the other person is competent, open, concerned, and reliable, thus rendering risk-taking more rational and realistic.

#### Discussion Questions

1. In a small group, discuss the level of trust among your work colleagues. Consider these topics: belief in others' promises, trust in the knowledge and data shared, and how you know when trust is lost.
2. Is there a relationship in which you can identify the behaviors that support trust and those that decrease trust levels?
3. How can you apply this information to your work team?



## Scenarios

Scenarios in each chapter prompt students to critically apply their new knowledge to real-life situations.

## Chapter Tests

Review key concepts with these questions at the end of each chapter. Test questions are linked to national licensure test categories and national leadership certification exam categories.

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### CRITICAL THOUGHT

Evidence-based practice is the integration of the best research evidence with clinical expertise and clinical values. All innovation builds upon evidence and is rarely an "Aha" moment.

- **Clinical expertise** is an evidence-based approach to decision-making uses a variety of tools to inform the best treatment(s) to achieve the expected outcomes. Factors to consider in clinical expertise are clinical judgment, internal evidence, clinical reasoning, and evaluation of healthcare resources.
  - **Best research evidence** refers to clinically relevant research, often from the basic health and medical sciences, but especially from patient-centered clinical research.
  - **Patient/Family values** refers to the unique preferences, concerns, and expectations that each patient brings to a clinical encounter and that must be integrated into clinical decisions if they are to serve the patient.
- (adapted from Melnyk & Fineout-Overholt, 2011)



### CRITICAL THOUGHT

- **Research** is the systematic examination of an idea using rigorous principles of experimentation and measurement.
- **Evidence-based practice** applies the relevant research and includes the expertise of the practitioner as well as patient preferences and values.



### CRITICAL THOUGHT

Implementing the second-best idea now is a better strategy than doing the best thing a week from now. It is a bigger risk to delay making decisions than to make marginal ones. Assessing factors in the environment should help guide to the best decision for the current time.

### When to Change

Several considerations arise in deciding when to change. When to change is best determined by taking into account the specific unit and system needs and resources. Although it has been said that timing is everything, sometimes the

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### CHAPTER TEST QUESTIONS

**Licensure exam categories:** Management of care: performance improvement, quality improvement, concepts of management

**Nurse leader exam categories:** Leadership: systems thinking, change management; Patient safety: performance improvement/metrics

1. Change
  - a. Is always associated with chaos.
  - b. Can be controlled using project management software.
  - c. Is an inevitable life process.
  - d. Is best managed by an individual with expertise in change theory.
2. Innovation and change:
  - a. Are similar but distinct concepts.
  - b. Are the same concepts.
  - c. Are based on the same assumptions.
  - d. Are avoided by healthcare workers.
3. Innovation and performance improvement:
  - a. Are two different change methodologies.
  - b. Exist as a continuum, each informing the other.
  - c. Are in direct opposition to one another.
  - d. Are both required in high-performing organizations.



FOURTH EDITION

# Leadership in Nursing Practice

The Intersection of Innovation and Teamwork  
in Healthcare Systems

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# New to This Edition

*L*eadership in Nursing Practice: Changing the Landscape of Health Care, Fourth Edition drives comprehension through various strategies that meet the needs of adult learners while also generating enthusiasm about the topic. This interactive approach addresses different learning styles, making this the ideal text to ensure mastery of key concepts. The pedagogical aids in this text are relevant to practice, experiential in nature, and engage problem-solving tactics. The organization of this text provides learners with content that is immediately relevant and applicable. New to this edition, We have significantly overhauled chapters on staffing, policy, professional growth, and innovation. This book remains a contemporary manual for the nurse leaders of today and the future.



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# Foreword

I have taught courses in professional issues and leadership to prelicensure students in schools of nursing in both the United States and Canada for more than a decade. The content in these courses tends to be broad. Normally, around a dozen topics are tackled, touching on a few major themes related to the idea of nurses being citizens of their work groups, organizations, professions, and societies. It is a bit of a flyover, because whole courses could be devoted to nearly every topic. Many students start off the semester a little apathetic or even suspicious of the material; by the end, nearly everyone is clear that the course content is essential to their career success. And with good reason: On the surface, many of the topics are “high level” abstractions, but scratch beneath that surface and it becomes obvious that the themes in such courses permeate day-to-day life in healthcare settings and that an understanding of them is critical to making the most of jobs and careers in nursing, whether a titled manager or not.

Healthcare systems around the world are facing financial constraints, demographic upheavals, rising public expectations and fears, and overwhelming evidence in terms of population health measures and assessments of quality and safety of services that the status quo in health care is both unsustainable and unacceptable. Today’s nurses, nursing students, and nurse educators are working in an environment that is changing much faster and in so many ways that few could have imagined even a mere decade ago—and those changes keep coming. Never has there been a greater need for nurses who have clear professional identities and the necessary habits of mind to work with colleagues and leaders in steering and reinventing health care in their communities.

What tends to help senior students make the leap to becoming well-informed, accountable professionals is a text written with a clear vision and voice that serves as a guide to new terminology and approaches to thinking about nursing work and its organizational contexts. For the diverse student body coming into nursing

these days, the approach must be straightforward but challenging, clear but not oversimplified. Fantastic articles are written every year in many disciplines that touch on the core ideas in these courses, new ways of thinking about them, and current developments in the practice. Some appear in the nursing literature, while others are written in related fields. Few, however, are targeted at upper-level nursing students, and selecting and assembling them into a coherent package—let alone an up-to-date one—is a task beyond most instructors' time and resources. Moreover, while many textbooks introduce leadership and management concepts for a variety of other purposes or attempt to ease the transition of students from apprentice to professional on a very concrete plane, no texts have been written at a consistently high level, without condescension, and geared toward helping students adopt a mature professional outlook. The authors have prepared exactly such a resource.

This text will challenge and provoke. It asserts nursing's rightful legacies of social justice and service, but does not airbrush some of the past failures of nurses to assume accountability as individuals, as leaders, or as a profession. Nevertheless, the approach is forward looking and the tone is heartening and hopeful. It will help nurses, especially ones who are early in their careers, realize that leadership is their business no matter where they work now or will work in the future, and that taking social and historical context into account is critical to understanding the present and building the future of nursing. Equally vitally, it clearly shows new nurses how they are partners in the settings where they practice who need to take charge of their professional lives and engage in the improvement of their organizations as a matter of duty, rather than expecting personalized invitations to do so.

An introduction to some of the freshest and best ideas in nursing and health-care management and leadership, prepared by some of the leading minds in our field, is in your hands. Whether you are reading it as a newcomer to the profession, picking it up later in your career, or reviewing it to prepare for guiding others into their roles as nurses, you are in for a treat. Anchored in a sense of nursing as a professional practice discipline, the authors are about to guide you through clear discussions of teamwork, leadership, staffing, and a host of other core topics. You are sure to walk away with many new ways of talking and thinking about nursing and for contributing to the future of health care.

**Sean P. Clarke, PhD, RN, FAAN**

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# Preface

We are excited to offer our nursing professional leadership colleagues this newly revised *Fourth*. We've considered this important work done on behalf of our colleagues who are leading nursing practice in the wide variety of settings where nurses work. We have worked diligently to focus this text on the vast majority of clinical nurses who do not seek to travel a management pathway yet provide leadership in any number of ways within the context of their practice. In a time of great change and difficulty in health care, the critical role of the nurse leader in the practice setting is becoming increasingly clear. New models of service delivery and a growing and strengthening relationship exemplified in transdisciplinary clinical teams and the accelerating engagement of the consumer of health care in healthcare decision-making and action serve as evidence of this significant change. As a result, every professional nurse needs to be exposed to the basic concepts of leadership as applied to team-based clinical practice and to be able to provide feedback on the potential quality and effectiveness of new ideas. If such practice is to be successful and nurses are to continue to coordinate, integrate, and facilitate the continuum of health services, leadership competence is a must, and it is to those nurses that this text is directed.

We need nurses as point-of-care leaders to engage in not only the work of patient care but also the evaluation of current practices and creation of improved practices that better meet the needs of the future. New approaches to on-the-job training, new rationale for promotion for clinical competence, and digitally sound leadership development resources are essential for progress and to avoid setting health care back in its ability to adapt quickly to change. The fourth edition of this text is meant to provide the foundations for academia and professional organizations to facilitate the development of nurses as leaders to quickly and effectively meet the needs for the future.

The passion for this text is driven by our desire for nurses to be the best they can be and from our observations of the impact of dysfunctional or uninformed leadership behaviors. We have seen the turnover, the stress, and the care impacts that occur when leading without a foundation in the evidence. This text is an attempt to provide the critical information to better lead health care differently at the bedside and in leadership positions. This text is focused on you! As a learner, as a leader, and as a nurse.

No text can cover the vastness that is leadership, so we focused on providing you with the most impactful and relevant concepts on the topic with an eye toward application. We feel very strongly that the reader should be able to approach any chapter of this book and instantly apply what is learned to their work. Applying these concepts to nurses' work will enhance the ability to be a clinical leader.

Management is the application of known solutions to known problems. This is not a management text. This textbook and associated resources are meant to provide frameworks, concepts, critical thoughts, and evidence to support the behaviors of leading. Leading is the ability to create solutions to unknown and unpredictable situations. This is a leadership text.

While our work is necessarily incomplete, in this *Fourth Edition* we have provided the essential and foundational leadership skills necessary to thrive in a complex clinical environment. We have added significant revision to this text to provide a path forward out of a major pandemic, and to ensure the content remains relevant as our profession evolves. As the landscape of healthcare changes, so to must the practice of leadership.

The chapters in this text purposely focus on foundational concepts, elements, and practices of contemporary leadership. In particular, principles of complexity leadership have guided the development of much of the content of this text. Both teachers and learners must grapple with an emerging knowledge base related to the leadership of complex systems if the expression of leadership practices is to be viable and relevant. In this text, contemporary understanding of the complexity of organizational cultures is used as a contextual framework for the discussion of leadership in each chapter. The emerging "complexity leader" must recognize that the leadership of organizations, systems, and the ways in which people work in networks and communities of practice is different from our previous understanding of the leader's role. With these newer concepts influencing complex organizational clinical and work networks, the leader applies a new framework to the expression of the leadership role. This understanding forms the backdrop of the content of each of the chapters in this text.

At the same time, it is important to integrate the obligations of the profession with the actions of the professional. Professions are a social mandate and address a significant social need. There is no greater social trust than that of nurses for the communities they serve and the health they advance. It is within this context of a social mandate that the professional nurse serves the health needs of the community. This understanding of nursing's social mandate provides the framework for meaning for each chapter. From discussion of the professional role to the incorporation of change and innovation and its application, focus remains firmly on the unique character of the professional nurse in the clinical setting. Chapters that explore foundational issues representing resource obligations provide an essential understanding of the operational mechanics of the systems within which the professional nurse will practice. Social issues related to the professional's obligation for ethical behavior and participation in policy and legislation affecting social health have also been addressed. Functional skills related to conflict, team-based leadership, negotiation, collective action, and personal relations all emphasize the individual's responsibility for effective professional behavior and relations. Given that professional practice is a lifelong pursuit, issues related to role accountability, career management, and the personal leadership learning journey have been particularly highlighted. The final chapter attempts to collate and synthesize the leadership information covered in each of the preceding chapters in a way that provides linkage and integration of leadership learning.

The content of the chapters and the learning associated with this text includes contemporary notions of development and learning practices. Relevant questions, scenarios, and online resources have all been developed in support of the learning activities associated with the leadership concepts of this text. The student of leadership is encouraged to use the full multimodal learning applications associated with this text as an opportunity to facilitate personal development and to translate concepts into leadership practices. Each of these tools reinforces learning and provides opportunities for leadership practice and personal expression of leadership skills.

As always, the authors acknowledge that this text is a work in progress. Learning material and support associated with this *Fourth Edition* will be continually refined and developed, as will the content of each of the chapters during future additions, refinements, and revisions. In addition, we encourage the reader to use a wide variety of leadership learning resources to supplement the foundations laid in this text. As we are all part of the leadership learning journey, the authors likewise expect to grow and develop, with their evolution being influenced by

students of leadership and other readers who challenge our own thinking and writing and participate in the improvement and advancement of leadership learning. In the final analysis, it is our hope that through this work, we will contribute in a small way to the development of future leaders in a way that provides a growing assurance of the maturation of nursing as a profession and its impact in making a difference in the health and lives of the people we serve.

**Dan Weberg**  
**Kara Mangold**  
**Tim Porter-O'Grady**  
**Kathy Malloch**

# Acknowledgments

My life and career would have never happened without the mentorship of Tim and Kathy. They have been gracious leaders, tough teachers, and amazing mentors in my journey through nursing and health care. Thank you for the opportunities. To my wife, Kim, and son, Parker, who put up with my writing on weekends and my shenanigans in between. And to my parents for their continual support and love.

This book is also dedicated to the disruptors. Those who dare to ask “why” and are willing to challenge the status quo. These Chief Disruption Officers are the ones who create the future and build it better. Stay focused and change the world.

*Dan Weberg*

This book is dedicated to those who find their authentic voice to speak up and innovate to advance nursing and health care, even when that voice shakes, especially when that voice shakes. More than ever, those who embrace vulnerability to advocate, question, and persist are needed. Pave new paths and take new journeys to build a network that honors the past to build a better future. I am indebted to mentors who have shaped me at the most pivotal times. To name a few: Sandy Hart, Ruth Hamilton, Cindy Crockett, Kathy Kenny, Nichole Nicholas, Mira Kedis, and of course Kathy Malloch and Tim Porter-O’Grady. Your excellence has inspired me to accept nothing less.

Most importantly, to my parents (Mary and Wayne), my three brothers, (Matt, Tim, and Colin), and extended family and friends: thank you for loving me, supporting me, nudging me, calling me out, and putting up with my crazy. You rock.

*Kara Mangold*

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Finally, I want to express my appreciation to the many colleagues, mentors, learners, and partners who have advanced my own learning and growth as a person, professional nurse, and leader. They have made my lifelong journey an endless joy, challenge, and exploration that has enriched me in ways both understood and reflective of the mystery that drives learning. I am in deep debt for the many gifts they have given me.

*Tim Porter-O'Grady*

Working with Tim Porter-O'Grady is an incredible gift that life has given to me. Tim's dedication to nursing, excellence, and advancement of the profession continues to provide me with a beacon that never dims. Most of all, I am thankful for Tim's friendship as a kindred soul in this very complex world.

I am especially grateful to my husband, Bryan, for his unqualified support of me and the work I have chosen to do. As we celebrate our 25 years of marriage this year, I can only hope the next 25 years are equally special and rewarding.

Finally, leadership never occurs in isolation. This work would not have been possible without all of the very special friends and colleagues who have contributed to my journey of lifelong learning. I continue to be inspired by your accomplishments, your dedication to excellence in patient care, and your never-ending challenges.

*Kathy Malloch*



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