Nurse Leadership Competency
Self-assessment Study:
Identifying Leadership Development Needs

Session L11 – ID#71153
26th International Nursing Research Congress, Puerto Rico
Monday 27 July 2015 8:30-9:45

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Disclosure & Learning Objectives

• The authors have no conflicts of interest to declare
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  – Caroline Etland, Sharp Chula Vista
  – Ana Maria Gallo, Sharp Grossmont

• Learner Objectives
  – Discuss how a healthcare system used a leadership self-assessment tool to identify learning needs of nurse managers & directors
  – Identify how education & experience influenced perceptions of leadership competency

• Acknowledge – Gamma Gamma Chapter STTI for their Research & Scholarship Awards to present this paper
Background

• AONE & ANCC recommend that nurses in leadership positions engage in a trajectory of life-long learning to continually enhance their knowledge and practice of transformational leadership.
# AONE Leadership Competencies

<table>
<thead>
<tr>
<th>AONE Nurse Director</th>
<th>AONE Nurse Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Communication and relationship building</td>
<td>• Managing the business</td>
</tr>
<tr>
<td>• Knowledge of the healthcare environment</td>
<td>• Art of Leading People</td>
</tr>
<tr>
<td>• Leadership Professionalism</td>
<td>• Creating the Leader Within</td>
</tr>
<tr>
<td>• Business skills</td>
<td></td>
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</tbody>
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San Diego’s Health Care Leader
Purpose

To measure the self-assessed competencies of nurses in leadership positions on the Sharp Metro Campus, Sharp Chula Vista & Sharp Grossmont.

The results of the study were used as a framework for the design of a leadership development course specific to the needs identified by the participants.
The specific goals of this research are to answer the following research questions:

1. How do the nurses in leadership positions self-rate their competencies on the AONE leadership competency inventory?

2. What are the differences in self-assessed competency levels based on educational background, years of experience in a leadership position, and number of leadership classes taken?
Methods

This IRB approved study used a cross-sectional quantitative survey design with a convenience non-probability sample of nurse leaders working on the Sharp Metro Campus, Sharp Chula Vista, and Sharp Grossmont.
Study Instruments

• **Demographic** survey to describe the sample consisting of 18 items.

• Instruments included:
  
  – For clinical leads, supervisors and managers - The AONE Competency Measures For Nurse Managers (101 questions)
  
  – For Directors - the AONE Competency Measures For Nurse Executives (196 questions)
Data Collection

• The population included all nurse leaders (clinical nurse leads, managers, and directors) \( N = 316 \)

• Recruitment of subjects was done with announcements in leadership meetings

• Data was collected by paper & pencil completed forms
Subjects’ Protection

• No personal identifiers were included on the survey instruments
• Responses are anonymous & confidential
• Responses were aggregated by hospital and across the health system rather than individually
Data Analysis

- Data was analyzed using SPSS v 23
- Non-parametric data was used to analyze nominal and ordinal data on the demographic form.
- Pearson product-moment correlations were used to determine the relationship between levels of education, years of experience in a formal management position, and number of leadership classes taken.
- Independent sample t-tests, ANOVA, and MANOVA measured differences in mean scores based on level of education, age, and years of experience.
Instruments

• AONE Nurse Manager & Nurse Director Competency Inventories (adapted)

• Response Range:
  – 1 = novice
  – 2 = advanced beginner
  – 3 = competent
  – 4 = proficient
  – 5 = expert

• Cut off for Excellent vs. Needs Improvement
  – > 3.5 = Excellent (Proficient and Expert)
  – < 3.5 = Needs Improvement (Novice through Competent)
Results
101 total participants/ 316 eligible for a 32% response rate
Director Demographics

- Total N = 13
- Years as Nurse Manager:
  - 2 – 25 years, M = 9.60 years
- Years as Director:
  - 1 – 15 years, M = 6.88
- Management Courses Taken:
  - 4 – 30 courses, M = 14.33
- Education – MSN (6), MS/MA (1), PhD (3)
RESEARCH QUESTIONS

The specific goals of this research are to answer the following research questions:

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# Director Competency Means

(Response Range: 1—*Novice* to 5 – *Expert*)

<table>
<thead>
<tr>
<th>Competency</th>
<th>Mean Score</th>
<th>Min Score</th>
<th>Max Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
<td>3.91</td>
<td>3.20</td>
<td>4.64</td>
</tr>
<tr>
<td>Knowledge</td>
<td>3.86</td>
<td>2.60</td>
<td>4.91</td>
</tr>
<tr>
<td>Leadership</td>
<td>4.23</td>
<td>3.16</td>
<td>4.84</td>
</tr>
<tr>
<td>Professionalism</td>
<td>4.36</td>
<td>3.76</td>
<td>5.00</td>
</tr>
<tr>
<td>Business Skills</td>
<td>3.85</td>
<td>2.78</td>
<td>4.91</td>
</tr>
<tr>
<td>Overall</td>
<td>3.96</td>
<td>2.97</td>
<td>4.84</td>
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1. How do the nurses in leadership positions self-rate their competencies on the AONE leadership competency inventory?

2. What are the differences in self-assessed competency levels based on educational background, years of experience in a leadership position, and number of leadership classes taken?
No Significant Differences for...

- Competencies by Years as Manager
- Competencies by Years as Director
- Competencies by Number of Management Courses Taken
- Competencies by Highest Degree Earned
## Director Competency Areas for Improvement

<table>
<thead>
<tr>
<th>Competency Area</th>
<th>Mean (Range 1-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRBDP: Community Involvement</td>
<td>3.31 (Competent)</td>
</tr>
<tr>
<td>CRBDP: Academic Relationships</td>
<td>3.26 (Competent)</td>
</tr>
<tr>
<td>Serve on academic advisory councils</td>
<td>2.62 (Advanced Beginner)</td>
</tr>
<tr>
<td>Collaborate with nursing faculty in research</td>
<td>2.77 (Advanced Beginner)</td>
</tr>
<tr>
<td>KHCE: Health Care Economics</td>
<td>3.27 (Competent)</td>
</tr>
<tr>
<td>KHCE: Health Care Policy</td>
<td>2.94 (Advanced Beginner)</td>
</tr>
<tr>
<td>Participate in legislative process</td>
<td>2.69 (Advanced Beginner)</td>
</tr>
<tr>
<td>Educate patient care team members</td>
<td>2.69 (Advanced Beginner)</td>
</tr>
<tr>
<td>Interpret Impact of legislation on nursing</td>
<td>2.92 (Advanced Beginner)</td>
</tr>
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<tr>
<td>KHCE: Governance Articulation</td>
<td>3.31 (Competent)</td>
</tr>
<tr>
<td>HCE: Utilization/Case Management</td>
<td>3.13 (Competent)</td>
</tr>
<tr>
<td><em>Involve physicians in on-going utilization</em></td>
<td>2.92 (Advanced Beginner)</td>
</tr>
<tr>
<td><em>Design continuum of care options</em></td>
<td>2.85 (Advanced Beginner)</td>
</tr>
</tbody>
</table>
Front-line Managers

Demographics

• Total N = 88
• Years as Nurse Manager:
  – 1 – 30 years, M = 8.73
• Management Courses Taken:
  – 1 – 36 courses, M = 9.80
• Highest Degree Earned:
  – Associate’s Degree: 13
  – BSN/BS/BA (Other): 39
  – MS/MSN/Doctorate (n = 1): 36
  – Missing: 8
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1. How do the nurses in leadership positions self-rate their competencies on the AONE leadership competency inventory?
2. What are the differences in self-assessed competency levels based on educational background, years of experience in a leadership position, and number of leadership classes taken?
Manager Competency Means
(Range: 1—*Novice* to 5—*Expert*)

<table>
<thead>
<tr>
<th>Competency</th>
<th>Mean Score</th>
<th>Min Score</th>
<th>Max Score</th>
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<tr>
<td>Managing the Business</td>
<td>3.36</td>
<td>1.43</td>
<td>4.39</td>
</tr>
<tr>
<td>Leading the People</td>
<td>3.69</td>
<td>2.56</td>
<td>4.94</td>
</tr>
<tr>
<td>Creating the Leader in Yourself</td>
<td>3.79</td>
<td>1.79</td>
<td>5.00</td>
</tr>
</tbody>
</table>

*SHARP*

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No Significant Differences for…

- Competencies by Years as Manager
- Competencies by Number of Management Courses Taken
Highest Degree Earned
Differences - Managers

• Significant differences for Managing the Business ($F = 3.37$, $p = .008$)
  – Uncorrected differences (alpha inflation present)
    • AD ($M = 2.47$) and BSN ($M = 3.12$; $t = -2.37$, $p = .023$)
      – On average, managers with BSNs outperform managers with ADs
    • BSN ($M = 3.12$) and BS/BA ($M = 2.69$; $t = 2.39$, $p = .020$)
      – On average, managers with BSNs outperform managers with BS/BA degrees
    • BS/BA ($M = 2.69$) and MSN ($M = 3.74$; $t = -2.72$, $p = .010$)
      – On average, managers with MSNs outperform managers with BS/BA degrees
  – Using Bonferroni adjustment, only BS/BA vs. MSN is significant (critical $p = .0125$)

• Bottom Line: Education Matters!
Limitations

• Small response set from Directors
  – Lack of interest in the subject?
  – Length of the tools –

• Paper & pencil surveys vs electronic?
Development Plan (Directors)

- Learning modules for directors that focus on their areas for improvement
  - Community involvement, academic relationship, serving on academic councils, partnering with nursing faculty in research
  - HC Economics and HC policy
  - Governance articulation
  - Utilization & case management
    - Continuum of care options; involving physicians
Development Plan for (Managers)

• Learning modules for directors that focus on their areas for improvement
  – Financial Management – budget management
  – HR Management – interviewing, labor laws
  – Foundational thinking – systems thinking, complex adaptive system application, decision & problems solving, conflict resolution, teamwork (High performance teams) & navigating change
  – Communication relationship building
Development Plan for (Managers)

– Strategic management – Project management, presentation skills, understanding/operationalizing organization’s strategic and operation plans at the unit level

– Creating the leader in yourself – professional association involvement, shared leadership council membership, action learning, ethics & advocacy, reflective practice

– Technical skills – MS Office (Excel)
Leadership Development Pilot

• A Leadership Development Intervention based on the findings was developed at SGH as a pilot for the HC System

• Integration of existing resources to aid knowledge development
  – Association of California Nurse Leaders (ACNL Leadership Course)
  – Sharp University Quarterly Leadership sessions
  – Advisory Board Talent Development
  – New course for Charge Nurses and Leads for succession planning, knowledge development & skill development.
Conclusions

• Education makes a difference
• Continue development with learning modules specific to position need and individual need
Questions