# Appendix ANurse Executive Competencies

# I. Communication and Relationship-Building

1. Effective Communication
   * Make oral presentations to diverse audiences on nursing, health care, and organizational issues
   * Produce cogent and persuasive written materials to address nursing, health care, and organizational issues appropriate to the audience
   * Resolve and manage conflict
2. Relationship Management
   * Build trusting, collaborative relationships with
     + Staff
     + Peers
     + Other disciplines and ancillary services
     + Physicians
     + Vendors
     + Community leaders
     + Legislators
     + Nursing and other educational programs
   * Deliver “bad news” in such a way as to maintain credibility
   * Follow through on promises and concerns
   * Provide service recovery to dissatisfied customers
   * Care about people as individuals and demonstrate empathy and concern while ensuring that organizational goals and objectives are met
   * Accomplish objectives through persuasion, celebrate successes and accomplishments, and communicate a shared vision
   * Assert views in non-threatening, non-judgmental ways
3. Influencing Behaviors
   * Create and communicate a shared vision
   * Reward appropriate behaviors and confront and manage inappropriate behaviors
   * Develop, communicate and monitor behavior expectations
4. Diversity
   * Create an environment, which recognizes and values differences in staff, physicians, patients, and communities
   * Assess current environment and establish indicators of progress toward cultural competency
   * Define diversity in terms of gender, race, religion, ethnicity, sexual orientation, age, etc.
   * Analyze population data to identify cultural clusters
   * Define cultural competency and permeate principles throughout the organization
   * Confront inappropriate behaviors and attitudes toward diverse group
   * Develop processes to incorporate cultural beliefs into care
5. Shared Decision Making
   * Engage staff and others in decision-making
   * Promote decisions that are patient-centered
   * Provide an environment conducive to opinion sharing
6. Community Involvement
   * Represent the organization to non–health care constituents within the community
   * Provide consultation to community and business leaders regarding nursing and health care
   * Be an effective board member for community and/or professional organizations
7. Medical Staff Relationships
   * Build credibility with physicians as a champion for patient care, quality, and nursing professionalism
   * Confront and address inappropriate behavior towards patients and staff
   * Represent nursing at medical executive committee and other medical staff committees
   * Collaborate with medical staff leaders in determining needed patient care services
   * Collaborate with physicians to develop patient care protocols, policies, and procedures
   * Collaborate with physicians to determine patient care equipment and facility needs
   * Utilize medical staff mechanisms to address physician clinical performance issues
   * Facilitate disputes involving physicians and nurses or other disciplines
8. Academic Relationships
   * Determine current and future supply and demand for nursing care
   * Identify educational needs of existing and potential nursing staff
   * Collaborate with nursing programs to provide required resources
   * Collaborate with nursing programs in evaluating quality of graduating clinicians and develop mechanisms to enhance this quality
   * Serve on academic advisory councils
   * Collaborate with nursing faculty in nursing research and incorporate nursing research into practice

# II. Knowledge of the Health Care Environment

1. Clinical Practice Knowledge
   * Maintain knowledge of current nursing practice and the roles and functions of patient care team members
   * Articulate patient care standards as published by JCAHO [Joint Commission], CMS, and professional nursing literature
   * Understand, articulate, and ensure compliance with the State Nurse Practice Act, State Board of Nursing regulations, regulatory agency standards, and policies of the organization
   * Ensure that written organization clinical policies and procedures are reviewed and updated in accordance with evidence-based practice
   * Role model lifelong learning, including clinical subjects such as disease processes, pharmaceuticals, and clinical technology
2. Delivery Models/Work Design
   * Maintain current knowledge of patient care delivery systems and innovations
   * Articulate various delivery systems and patient care models and the advantages/ disadvantages of each
   * Serve as change agent when patient care work/workflow is redesigned
   * Determine when new delivery models are appropriate, and then envision and develop them
3. Health Care Economics
   * Articulate federal and state payment systems and regulations, as well as private insurance issues, which affect organization’s finances
   * Understand and articulate individual organization’s payer mix, CMI, and benchmark database
4. Health Care Policy
   * Articulate federal and state laws and regulations that affect the provision of patient care, e.g., tort reform, malpractice/negligence, reimbursement
   * Participate in the legislative process concerning health care through membership in professional organization and personal contact with public officials
   * Educate patient care team members on the legislative and regulatory processes and methods for influencing both
   * Interpret impact of state and federal legislation on nursing and health care organizations
5. Governance
   * Articulate the role of the governing body of the organization in the following areas:
     + Fiduciary responsibilities
     + Credentialing
     + Performance management
   * Represent patient care issues to the governing body
   * Participate in strategic planning and quality initiatives with the governing body
   * Interact with and educate the organization’s board members regarding health care and the value of nursing care
   * Represent nursing at the organization’s board meetings
6. Evidence-Based Practice/Outcome Measurement
   * Interpret information from research
   * Utilize research findings for the establishment of standards, practices, and patient care models in the organization
   * Disseminate research findings to patient care team members
   * Participate in studies that provide outcome measurements
   * Allocate nursing resources based on measurement of patient acuity/care needed
7. Patient Safety
   * Support the development and implementation of an organization-wide patient safety program
   * Design safe clinical systems, processes, policies, and procedures
   * Monitor clinical activities to identify both expected and unexpected risks
   * Support a non-punitive reporting environment and a reward system for reporting unsafe practices
   * Support safety surveys, responding and acting on safety recommendations
   * Ensure staff is clinically competent and trained on their role in patient safety
   * Articulate and take action to support the JCAHO National Patient Safety Goals
8. Utilization/Case Management
   * Articulate organization for the criteria model adopted by the organization
   * Communicate key points of the model to a variety of audiences (nursing, financial, medical staff)
   * Involve physicians in on-going utilization management practices
   * Design continuum of care options for managing patient throughput (long term care units, urgent care centers, admission/discharge units, etc.)
9. Quality Improvement/Metrics
   * Articulate the organization’s QI program and goals
   * Determine patient care quality improvement goals and objectives
   * Define metrics as related to process improvement
   * Explain and utilize metrics as a unit of measure for any process
   * Articulate the link between metrics and goals
   * Articulate the link between organization metrics and national quality initiatives/metrics
   * Target outcomes that are evidence-based (comparison data benchmarking)
   * Define quality metrics by
     + Identifying the problem/process
     + Measuring success at improving specific areas of patient care
     + Analyzing the root causes or variation from quality standards
     + Improving the process with the evidence
     + Controlling solutions and sustaining success
10. Risk Management
    * Identify areas of risk/liability
    * Ensure staff is educated on risk management and compliance issues
    * Develop systems which encourage/require prompt reporting of potential liability by staff at all levels
    * Envision and take action to correct identified areas of potential liability

# III. Leadership

1. Foundational Thinking Skills
   * Address ideas, beliefs, or viewpoints that should be given serious consideration
   * Recognize one’s own method of decision making and the role of beliefs, values, and inferences
   * Critically analyze organizational issues after a review of the evidence
   * Maintain curiosity and an eagerness to explore new knowledge and ideas
   * Promote nursing leadership as both a science and an art
   * Demonstrate reflective leadership and an understanding that all leadership begins from within
   * Provide visionary thinking on issues that impact the health care organization
2. Personal Journey Disciplines
   * Value and act on feedback that is provided about one’s own strengths and weaknesses
   * Demonstrate the value of lifelong learning through one’s own example
   * Learn from setbacks and failures as well as successes
   * Assess one’s personal, professional, and career goals and undertake career planning
   * Seek mentorship from respected colleagues
3. Systems Thinking
   * Promote systems thinking as a value in the nursing organization
   * Consider the impact of nursing decisions on the health care organization as a whole
   * Provide leadership in building loyalty and commitment throughout the organization
   * Synthesize and integrate divergent viewpoints for the good of the organization
4. Succession Planning
   * Promote nursing management as a desirable specialty
   * Conduct periodic organizational assessments to identify succession planning issues and establish action plans
   * Serve as a professional role model and mentor to future nursing leaders
   * Establish mechanisms that provide for early identification and mentoring of staff with leadership potential
   * Develop a succession plan for one’s own position
5. Change Management
   * Utilize change theory to plan for the implementation of organizational changes
   * Serve as a change agent, assisting others in understanding the importance, necessity, impact, and process of change
   * Support staff during times of difficult transitions
   * Recognize one’s own reaction to change and strive to remain open to new ideas and approaches
   * Adapt leadership style to situational needs

# IV. Professionalism

1. Personal and Professional Accountability
   * Create an environment that facilitates the team to initiate actions that produce results
   * Hold self and others accountable for actions and outcomes
   * Create an environment in which others are setting expectations and holding each other accountable
   * Answer for the results of one’s own behaviors and actions
2. Career Planning
   * Develop own career plan and measure progress according to that plan
   * Coach others in developing their own career plans
   * Create an environment in which professional and personal growth is an expectation
3. Ethics
   * Articulate the application of ethical principles to operations
   * Integrate high ethical standards and core values into everyday work activities
   * Create an environment that has a reputation for high ethical standards
4. Evidence-Based Clinical and Management Practice
   * Advocate use of documented best practices
   * Teach and mentor others to routinely utilize evidence based data and research
5. Advocacy
   * Role model the perspective that patient care is the core of the organization’s work
   * Assure that the clinical perspective is included in organizational decisions
   * Ensure that nurses are actively involved in decisions that affect their practice
6. Active Membership in Professional Organizations
   * Participate in at least one professional organization
   * Support and encourage others to participate in a professional organization

V. Business Skills

1. Financial Management
   * Articulate business models for health care organizations and fundamental concepts of economics
   * Describe general accounting principles and define basic accounting terms
   * Analyze financial statements
   * Manage financial resources by developing business plans
   * Establish procedures to assure accurate charging mechanisms
   * Educate patient care team members on financial implications of patient care decisions
2. Human Resource Management
   * Participate in workforce planning and employment decisions
   * Champion a diverse workforce
   * Use corrective discipline to mitigate workplace behavior problems
   * Interpret and evaluate employee satisfaction/quality of work surveys
   * Create opportunities for employees to be involved in decision-making
   * Reward and recognize exemplary performance
   * Formulate programs to enhance work-life balance
   * Interpret legal and regulatory guidelines
   * Manage collective bargaining environments or implement programs to avoid the need [sic]
   * Identify and eliminate sexual harassment, workplace violence, and verbal and physical abuse
   * Implement ergonomically sound work environments to prevent worker injury and fatigue
   * Develop and implement bioterrorism, biohazard, and disaster readiness plans
   * Identify clinical and leadership skills necessary for performing job-related tasks
   * Select top talent, matching organizational needs with appropriate skill sets (assess job candidate skills sets)
   * Manage performance through rewards, recognition, counseling, and disciplinary action
   * Provide mentorship and career counseling to aspiring clinicians and leaders so they may develop required skill sets (succession planning)
   * Identify future skill sets needed to remain competitive
   * Analyze market data in relation to supply and demand and manage resources to ensure appropriate compensation
   * Develop and implement recruitment and retention strategies
3. Strategic Management
   * Analyze the situation and identify strategic direction
   * Conduct SWOT and gap analyses
   * Formulate objectives, goals, and specific strategies related to mission and vision
   * Understand what organizations should measure in order to “balance” the financial perspective
   * Measure and analyze performance from the learning and growth, business process, customer, and financial perspectives
4. Marketing
   * Analyze marketing opportunities
   * Develop marketing strategies
   * Integrate marketing and communications strategies
   * Use public relations and media outlets to promote your organization
5. Information Management and Technology
   * Demonstrate basic competency in e-mail, common word processing, spreadsheet, and Internet programs
   * Recognize the relevance of nursing data for improving practice
   * Recognize limitations of computer applications
   * Use telecommunication devices
   * Utilize hospital database management, decision support, and expert system programs to access information and analyze data from disparate sources for use in planning for patient care processes and systems
   * Participate in system change processes and utility analysis
   * Participate in the evaluation of information systems in practice settings
   * Evaluate and revise patient care processes and systems
   * Use computerized management systems to record administrative data (billing data, quality assurance data, workload data, etc.)
   * Use applications for structured data entry (classification systems, acuity level, etc.)
   * Recognize the utility of nursing involvement in the planning, design, choice and implementation of information systems in the practice environment
   * Demonstrate awareness of societal and technological trends, issues and new developments as they apply to nursing
   * Demonstrate proficient awareness of legal and ethical issues related to client data, information, and confidentiality
   * Read and interpret benchmarking, financial, and occupancy data