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The work of nurses in mid-level nursing and midwifery management positions covers a broad spectrum with considerable variations in core tasks and areas of responsibility. Nonetheless, this role is becoming pivotal to effective service co-ordination and is increasingly involved in quality assurance.

Specifically in relation to mid-level nursing and midwifery management the Commission on Nursing recommends that the responsibilities should include the following:

- › have a defined management role and not merely retain a 'gate-keeping' administrative function
- › have defined management responsibility with explicit delegation of authority from directors of nursing and chief nursing officers
- › have definite functional roles either in managing units of care or in the management of functional responsibilities such as in bed management and practice development co-ordination
- › have the authority to manage their area of responsibility without constant reference to more senior management. However, as in all management, there should be effective communication with front-line and senior management. (7.29, page 16)

The **primary purpose of the role** in mid-level management is to co-ordinate the development and delivery of nursing services across a significant service sector (geographical sub-regions, a hospital division etc).

Scope of the role

- › to lead in the professional planning and commissioning of new services and new ways of delivering effective services (e.g. skill mix, nursing attendants etc)
- › to ensure co-ordination of resource deployment (staff primarily) across service units/wards etc to meet fluctuations in demand
- › to ensure that all nursing services are managed to optimise effectiveness, quality and efficiency
- › to ensure co-ordination of scheduling across different activity areas (departments, theatres and wards, day and residential services)
- › to take a lead role in functional areas such as personnel, health and safety, activity analysis etc
- › to play a lead role in staff recruitment and induction
- › to lead the implementation of performance review and staff counselling
- › to develop a coherent nursing identity and a clear management style for the division/service area
- › may have a managerial role in addressing complaints, discipline or grievance issues
- › takes a lead role in facilitating interdisciplinary and inter-service issue co-ordination and resolution
- › budget planning for nursing resources.

Timescale of impact

One month to one year plus ideally, although staffing issues and resource planning can have a much shorter timeframe in terms of problem solving and short-term response planning.

Changes, trends and challenges

The trends

- › growing emphasis on value for money
- › growing emphasis on formalised protocols and processes for service evaluation, audit and quality assurance
- › increasing specialisation within the delivery of services
- › public health nursing becoming a primary health service hub
- › community nursing fulfilling a skills transmission and facilitation role with other providers of care
- › the urgent issue of staff shortages and the need to review core and peripheral tasks in role allocation
- › evolving models of nursing practice not all of which are consistent with each other
- › the need to develop new approaches to skill mix, to giving away skills and to being more innovative in models of service delivery.

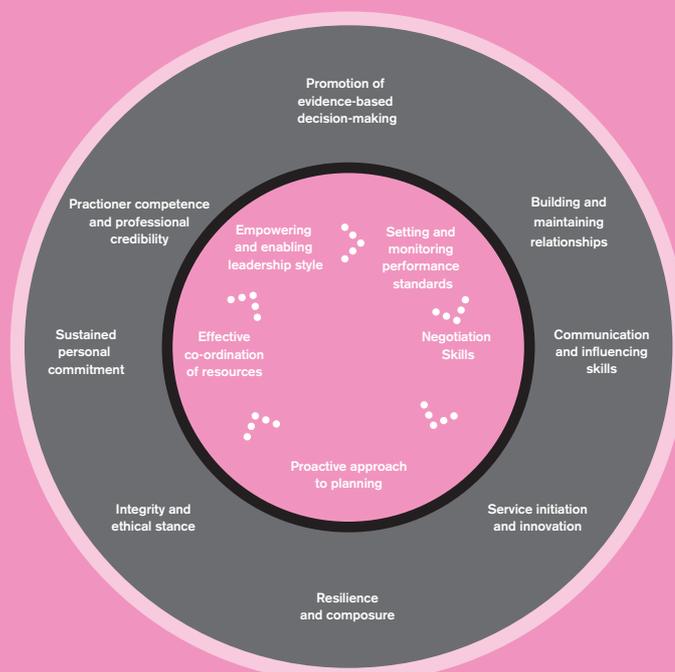
The challenge

- The challenge is to take up an 'integrator role' involving
- › at service delivery level integrating the resourcing and quality assurance activities across service units
 - › at service delivery level integrating the deployment and contribution of specialist/expert nurses within the overall service system
 - › at service development level integrating the learning on the practice level and the impact of new technologies etc with the requirement to deliver continuity and quality of service within a resource efficient paradigm
 - › at service development level integrating the leadership and learning and practice at front-line service level with the values and policies being developed at corporate or organisational levels
 - › at service management level, integrating the service quality imperative with the need for efficiencies in resource deployment
 - › at service management level the need to champion evidence-based nursing management practices while retaining a primary patient advocate role
 - › to act as the 'knowledge integrators' by bridging current realities and practice at delivery level and the strategic direction for the service (see diagram).



Middle-manager competency map

We have identified five critical competencies for this level of nursing management.



Definition

Practices an enabling management style with the front-line management team and other contributing professionals.

AREAS OF APPLICATION

- › Operating a consultative decision-making process on service issues
- › Pushing down responsibility and accountability to front-line management levels
- › Proactively involving staff in managing change
- › Joint development of care standards, operating protocols etc
- › Encouragement of service proposals from the front line

1



Empowering and enabling leadership style

Indicators of MORE effective performance

- › Uses a consultative approach, is approachable and keeps channels of communication open with staff/trusts them to keep leader informed and ensures team members are informed at all times
- › Uses a democratic style and encourages staff to make decisions about their environment. Delegates tasks effectively
- › Gives time to staff development/team meetings and allows staff time to plan and develop their work and assists in making time and resources available to do so
- › Fully involves other service providers in deciding upon service needs and developments
- › Encourages all team members to participate and contribute views on service issues
- › confident and comfortable about own capabilities and level of accountability when inviting contributions from others
- › Works to create a team ethos and collaboration across units at front-line
- › Encourages synergies and sharing of ideas and learning from projects
- › Leads enthusiastically on change. Presents the benefits case, influences staff positively and gets 'buy in'

Indicators of MORE effective performance

- › Deliberately delegates stretching tasks to junior managers and supports their learning and delivery. Coaches junior managers to improve reflection and practices
- › Leads emotionally as well as rationally. Understands team members needs well and responds empathetically. Has a strong positive influence in team situations
- › Establishes ad hoc management teams to develop service proposals
- › Encourages front-line contributions.

1



Empowering and enabling leadership style

Indicators of LESS effective performance

- Tends to remain distant and does not ask for views or opinions. Uses a top down style of communication
- Uses an autocratic style and makes own decisions and communicates these to staff as 'fait accompli'. Tries to do everything. Does not delegate
- Tends to hold few and short meetings with a strong emphasis on routine and maintenance of status quo
- Does not involve other providers or professionals in decisions regarding service needs or developments
- Selectively involves team members in discussions on service issues
- Is anxious or less confident about own role when engaged in consultative decision-making processes
- Tends to manage subordinates on a more individualistic basis. Everyone works on their own project without sharing. Doesn't create a common view or ethos
- Is reluctant to change, focuses on the difficulties. Looks to compromise and minimises changes in practice or routines
- Is overly cautious and plays too safe in delegating tasks to others. Tends not to fully trust the capability of subordinates

Indicators of LESS effective performance

- Tends to be more formal in style and treats all individuals in the same way. Can be wooden or uninspiring in team settings
- Relies on the formal management chain to develop new proposals or services.

Definition

Establishes clear objectives and defines core standards of performance and clear expectations for his/her unit managers. Regularly reviews performance against standards.

AREAS OF APPLICATION

- › Defining service level expectations
- › Tracking service quality and intervening as appropriate
- › Conducting staff appraisals and reviewing performance
- › Giving staff a clear sense of priority
- › Establishing project management protocols

2



Setting and monitoring performance standards

Indicators of MORE effective performance

- › Establishes project teams with clear terms of reference, reporting protocols and review processes
- › Regularly reviews progress on work projects in relation to set targets
- › Encourages team to set and achieve short-term and medium-term goals
- › Conducts formal appraisals or performance reviews with staff and sets agreed targets and goals
- › Uses tangible measures as outcomes to evaluate service or performance levels and collects these regularly
- › Intervenes decisively where service levels or quality are below standard and establishes a remedial process
- › Will be assertive in addressing staff performance problems. Will intervene in a timely and positive way
- › Will be prepared to make tough decisions or invoke sanctions for poor performance as needed
- › Coaches and mentors staff to improve their performance
- › Strongly encourages junior managers and supervisors to set specific performance goals and standards

Indicators of MORE effective performance

- › Encourages and supports assertive performance management by junior managers
- › Encourages staff development and sharing of best practice. Links staff development and training to the priority service needs.

2



Setting and monitoring performance standards

Indicators of LESS effective performance

- › Establishes project teams without clear enough guidelines or objectives. Fails to put in place systems for tracking and review of progress or may not set specific enough targets
- › Tends to focus on day-to-day operations and does not set medium-term targets
- › Does not conduct formal appraisals nor review performance systematically, does not set specific goals or measures
- › Doesn't use tangible data to evaluate progress or service levels or does so on an inconsistent or irregular basis
- › Collects data but doesn't use it to address shortfalls in performance, slow to respond to failing standards
- › Will tend to let performance issues fester or intervene in a negative way when they have gone too far
- › Will tend to let difficult decisions slip or put off confronting the issue
- › Lets staff perform as they can without positive guidance
- › Lets subordinate managers concentrate on the day-to-day without giving enough attention to leading on standards assurance
- › Lets junior managers refer difficulties with staff performance upwards

Indicators of LESS effective performance

- › Reactive to staff development needs and does not link training and development to service priorities.

Definition

Skilful in the handling and positive resolution of conflict, building common ground and seeking to achieve mutually acceptable outcomes. Can be skilfully assertive to achieve desired outcomes, puts a case across well.

AREAS OF APPLICATION

- › Negotiating with senior management and external agencies to obtain resources
- › Introducing new ways of working and selling the benefits of change
- › Resolving employee relations issues
- › Adjudicating or mediating in inter-professional disputes or client issues
- › Negotiating to redeploy staff

3



Negotiation skills

Indicators of MORE effective performance

- › Always investigates background to issues thoroughly and investigates all possible options, senses when there is a more complex or sensitive underlying issue
- › Shows a balanced approach in disputes and listens to both sides. Is open minded
- › Able to use high level of communication skills to convince or argue the needs of staff and of service
- › Able to see others' viewpoints and builds a win/win case and bridges the interests of both parties
- › Able to put forward alternative suggestions in problem solving
- › Retains composure under pressure and stays calm, is assertive but not aggressive
- › Skilful in getting both parties to exchange positions and check their relative understanding
- › Can win concessions by offering some ground and doesn't let the issue destroy the relationship
- › Judges the timing of interventions to maximise effect
- › Anticipates objections and prepares ground. Gets into consultation early
- › Knows how to get things done both through formal channels and the informal network.

Indicators of LESS effective performance

- › Will go into sensitive meetings poorly prepared or with only half the facts and tends to jump to a solution
- › Shows bias and may get emotionally involved, takes sides in disputes or prejudices issues
- › Poor communication skills, doesn't present effective arguments
- › Tends to see things only from own perspective and doesn't sell benefits to the other party
- › Does not put forward suggestions. Only provides one proposal and then waits for solution
- › Tends to react emotionally and shows the strain, can become aggressive in style
- › Allows both parties to concentrate only on their own concerns, doesn't encourage position clarification
- › Wins concessions at too high a cost to the working relationship. Only wants to get and doesn't offer to give or reciprocate
- › Misjudges situations and has a 'bull in a china shop' effect, overreacts too early
- › Doesn't read the environment well, doesn't get key players on side early enough
- › Is overly rigid or naive in only going through formal channels to get things done.

Definition

Looks ahead and forward plans for service developments. Anticipates trends and identifies opportunities. Ensures that the learning from new service models and practices influences service planning.

AREAS OF APPLICATION

- › Planning the development of new services and practices
- › Anticipating resourcing needs on a medium-term basis
- › Making a strong input to interdisciplinary policy and planning groups
- › Forward planning on complex service issues (e.g. new work practices, etc)
- › Integrating the learning from implementing new practices with future plans

4



Proactive approach to planning

Indicators of MORE effective performance

- › Sensing and keeping ear to the ground on corporate agenda. Leads on translating the corporate agenda into practical service planning
- › Shows strong trend anticipation and sensing skills and uses these to opportunistically develop services or practices
- › Shows awareness of service needs, able to analyse and assess current systems and demand levels to develop best system, based on needs
- › Constantly seeking to identify areas for practice development, i.e. where improvement is necessary in terms of staff and service development, so that better outcomes can be achieved
- › Develops a proactive and positive working relationship with unions and staff associations around change issues
- › Collaborates with other disciplines and agencies in the development of service plans. Leads interdisciplinary planning groups
- › Acts as the conduit to ensure that the learning from new service practices actively shapes future service plans
- › Takes responsibility for service policy development.

Indicators of LESS effective performance

- › No awareness of 'bigger picture'. Tends to view service at micro or operational levels only
- › Misses opportunities to develop new services due to short-term focus, or lack of awareness of developments within the wider health and social care system
- › Does not analyse or assess service needs, tends to be reactive in approach to service development
- › Only examines need to improve services when there is a crisis
- › Only relates to unions and staff associations on a reactive basis and may become embroiled in difficult industrial relations with unions
- › Tends to be more comfortable planning from a single discipline perspective
- › Continues to plan services in a top down way without consulting the staff on the learning from current applications and practices.
- › Needs to be continuously reminded to engage in policy development.

Definition

Ensures that critical human and material resources are allocated in an effective way, monitors activity levels and intervenes to align resources and maximise efficiencies.

AREAS OF APPLICATION

- › Ensuring an adequate supply of staff to meet service demands
- › Planning and monitoring the use of material resources
- › Setting budgets and tracking expenditure
- › Tracking service levels and reorganising staffing to meet contingencies
- › Continually reviewing how productively resources are being used to meet service needs

5



Effective co-ordination of resources

Indicators of MORE effective performance

- › Shows system understanding and the ability to balance multiple resourcing issues
- › Consistently achieves efficiencies in resource usage by intelligent deployment, adjustments and monitoring
- › Negotiates services and resource levels with funding bodies and/or third parties
- › Demonstrates the capability to accurately measure resource usage against activity level for key areas (utilisation indices)
- › Implements effective monitoring systems for all key resource deployments
- › Can skilfully deploy and adjust human resources to meet changes, demands and contingencies
- › Is resourceful in solving staff shortages or crises. Reacts quickly and sources staff creatively
- › Shows a financial awareness as relevant to the service. Plans budgets and track variance
- › Shows a sound appreciation and usage of IT systems for resource management
- › Very mindful of wasting resources and encourages this attitude in staff and junior managers. Cuts down appropriately on resources used and values cost saving as a way to free up resources for further service developments.

Indicators of LESS effective performance

- › Manages resource usage in a reactive and historically informed way
- › Is slow to intervene and lacks flexibility in reviewing and reallocating resources to meet changing needs or demand levels
- › Refers service and resourcing level issues to the director without fully developing them
- › Lacks confidence in dealing with funding agencies and third parties
- › Monitors resource usage, mainly by significant exceptions or on an ad hoc basis
- › Not aware of non-professional staffing and resources issues
- › Operates standard rotas and scheduling without consideration of changing service needs and opportunities
- › Has difficulty coping with unexpected staffing problems. Slow to react and relies too much on conventional approaches
- › Averse to financial monitoring, defers to finance staff without making an informed contribution
- › Uses IT systems at a minimal level or not at all
- › Tends to waste resources and downplays this issue with staff and other managers. Makes resource cuts in a reactive or poorly thought through way. Lacks a rationale for where efficiency is needed.



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