**Transformational Leadership: Advocacy and Influence**

**TL6: The CNO advocates for organizational support of ongoing leadership development for all nurses, with a focus on mentoring and succession planning.**

**TL6c: Provide one example, with supporting evidence, of mentoring OR succession planning activities for nurse leaders.**

**Introduction**

When a career advancement opportunity led to Annabaker Garber, RN, PhD, the Director of Nursing & Patient Care Services (N&PCS) Clinical Informatics at Massachusetts General Hospital (MGH) to leave MGH on December 18, 2015, Van Hardison, PhD, RN-BC, CENP, FHIMSS, was named Garber’s interim successor. He arrived at MGH in early December 2015. In her role Garber was accountable for N&PCS’s implementation of eCare, an electronic health record based on the Epic platform. To ensure a seamless transition at this important time, the two met and reviewed her work to date, and Hardison enthusiastically supported and continued to guide staff in continuing her work plan. Concurrently, recognizing that this important leadership position needed to be filled, Jeanette Ives Erickson, RN, DNP, NEA-BC, FAAN, Senior Vice President for Patient Care and Chief Nurse (CNO), began the search for the Director of N&PCS Informatics. As she reflected on possible candidates for the position, Ives Erickson thought of Ann Marie Dwyer, RN-BC, DNP.

The two had first met when Dwyer was the Interim Chief Nurse at Spaulding Rehabilitation Center, a Partners HealthCare affiliated acute care rehabilitation hospital. In that role, she was a member of the Partners Chief Nurse Council which is chaired by Ives Erickson. It was at those meetings that Ives Erickson began to mentor Dwyer. Dwyer had told Ives Erickson, that she would not be applying for the CNO position at Spaulding and was looking for not just a new position, but new challenges. Dwyer remembers Ives Erickson telling her to “to focus on what would make her happy”. With Ives Erickson’s encouragement Dwyer applied and was appointed to Senior Nurse and Associate Director of the Clinician Team, Partners eCare. Now, with Garber’s departure, Ives Erickson wondered if Dwyer ready to move to the next level to the role of Director of N&PCS Clinical Informatics.

The following story describes Ives Erickson’s mentoring of Dwyer in her role as Director of N&PCS Clinical Informatics.

**The CNO’s Mentoring of a Novice Director of Informatics (Nurse Leader)**

Ives Erickson recognized that in her current position Dwyer was accountable for leading a 100-person team, focused on clinical content, clinical process redesign, biomedical device integration, clinical informatics and quality and safety as those topics related to the implementation of the electronic health record. If she was appointed Director of N&PCS Informatics, she would be accountable for all aspects of eCare including setting the direction and continued integration of eCare into the work of MGH clinicians and the patients they care for as well as supporting the roll-out of other technology applications.
Ives Erickson met with Dwyer in early May 2016 to discuss her position. Dwyer expressed her interest in the position but also recognized that she would have a steep learning curve as her academic preparation was not in Information Systems (IS).

Ives Erickson knew that Dwyer had the talent, intelligence and commitment to succeed and she would require mentoring to be successful in this new and complex role. But, she also knew that just her knowing that wasn’t enough. Ives Erickson knew that in this critical organizational role, not only would Dwyer’s direct reports need to know that she was capable and competent to lead, but the wider organization needed to know and trust that too. Ives Erickson needed to ensure that both constituencies understood that Dwyer had not only her support but also possessed the knowledge and skill to lead N&PCS Clinical Informatics.

To better understand Dwyer’s needs to be successful in the role, Ives Erickson arranged for Dwyer to have a conference call with Emily Barey, RN, MSN, Director of Nursing Informatics at Epic on May 18, 2016 (attachment TL6c.a). Ives Erickson had asked Barey to identify the gaps in Dwyer’s informatics knowledge and how to address those gaps. Barey stated that Dwyer would be an asset in the role and while she recognized that Dwyer did not have the traditional background in IS those concerns could be addressed through certification and participation in Epic training at their corporate office in Verona, Wisconsin. Barey also offered ongoing support for Dwyer in this new role and cited that Ives Erickson would be a strong mentor for Dwyer.

Following that call, Ives Erickson and Dwyer identified initial strategies to enhance Dwyer’s knowledge of Epic technology and clinical informatics and to promote her organizational credibility in the role. Ives Erickson and Dwyer agreed that Dwyer would pursue certification in Nursing Informatics and attend training at Epic headquarters. Ives Erickson would also ensure that Dwyer and Barey would remain in close contact to address any Epic specific issues.

Following a comprehensive interview process with key stakeholders in N&PCS and MGH Informatics, Ives Erickson announced on July 7, 2016 that Dwyer was appointed to the position of Director of N&PCS Informatics and would be starting on August 14, 2016 (attachment TL6c.b). She noted that Debra Burke, RN, DNP, NEA-BC, Associate Chief Nurse, Oncology, Pediatric, Women's Health & Community Nursing Services, would serve as Dwyer’s preceptor. In the announcement Ives Erickson’s mentoring of Dwyer is evident as she notes that Dwyer would with the interim Director of N&PCS Informatics, Hardison, to ensure a smooth transition and attend a two-week training at Epic Headquarters.

It should be noted that in the announcement Ives Erickson’s comment that Dwyer’s training will, “position us well for the planned eCare upgrade scheduled in October” sends the message to the organization that Dwyer is knowledgeable and competent to
guide the organization through the upgrade. Ives Erickson’s role of mentor includes not only leading the organization in welcoming Dwyer but in addressing any organizational concerns that the new leader is not prepared and ready for the role.

On August 16, 2016 Dwyer updates Ives Erickson following their recent discussion (attachment TL6c.c) writing her that she had:

- Spent 4 days at Epic Headquarters and had completed the final modules of the Clinician Builders training and her plans to complete 4 build projects and two exams.
- Scheduled a date to take her ANCC certification exam for September 16, 2016
- Scheduled a meeting with her preceptor (Debra Burke).

Ives Erickson’s response reflected that she was pleased with Dwyer’s progress. It was also full of encouragement for Dwyer and Ives Erickson shares her happiness that she has joined MGH and her commitment to help Dwyer to become “a national leader”.

On October 18, 2016 Dwyer updated Ives Erickson on her transition to her new role (attachment TL6c.d). It is clear in this exchange that Ives Erickson role of mentor has assisted Dwyer into her new role. She confidently articulates completion of the goals she and Ives Erickson identified in May 2016:

- Passing her certification exam in Clinical Informatics.
- Attendance at Epic user meeting at Epic headquarters.
- Continued collaboration with Barey on innovative approaches in the use of technology.
- Active engagement in the planning for the Epic upgrade scheduled for late October 2016.
- Coordination of debrief sessions of Omnicell downtime.
- Collaboration with Katie Wolf, clinical project director of Partners eCare at the MGH.

Ives Erickson’s response is filled with encouragement and gratitude that Dwyer is a member of her team. She asks Dwyer to think about for further discussion, “What can I do to help you with your entry into this complex organization?” Ives Erickson also
identifies new priorities that she’d like Dwyer to address including additional staff education about the eCare system which will require the development of a tactical plan.

On March 13, 2017 Burke notified Ives Erickson that Dwyer had successfully completed her orientation (attachment TL6c.e). Dwyer and Burke had agreed on future goals including:

- Develop an understanding of the organizational and departmental structure and culture.
- Define the work of N&PCS Clinical Informatics post eCare implementation.
- Facilitate system enhancements
- Facilitate the use of innovation and new technology to support departmental and organizational goals.

Ives Erickson recognizes that every objective she and Dwyer first discussed in May 2016 had been achieved and that Dwyer is “an important member of our team, the MGH community and an informatics nurse leader in our system.” In less than a year, Dwyer had successfully transitioned into her role. That success is a tribute to Dwyer’s intelligence, commitment and hard work and the gift of having Ives Erickson as a mentor. From the moment they met, Ives Erickson saw a potential in Dwyer that Dwyer made not have known was there. Ives Erickson created opportunities for her to learn, to be challenged, to take risks and to be successful. She was her biggest cheerleader, her confidant and colleague. She was, and is, her mentor.

Ives Erickson’s mentoring of Dwyer reflects not only her knowledge of MGH and Partners HealthCare systems but her ability to assist a novice nurse leader successfully transition to her new role.