# Leadership in Transition to Practice

Disclosures

- None

Objectives

1. Describe PA/NP transition to practice leadership roles in context of the structural alignment.
2. Identify value and metrics to support PA/NP transition to practice leadership roles.
3. Recognize the opportunity and methods to integrate diverse and innovative leadership and professional skill development during transition to practice.

Who We Are
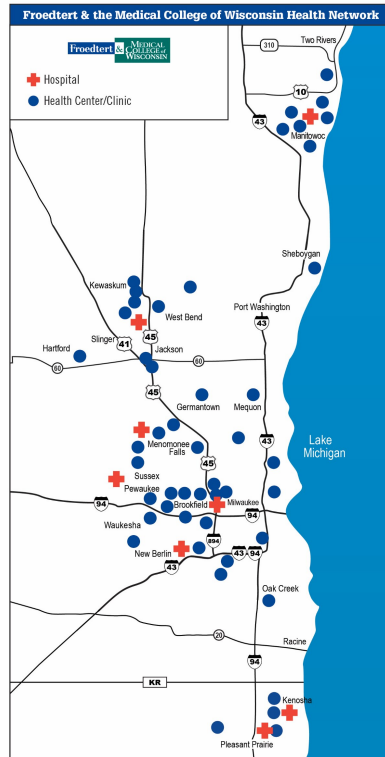
The **Froedtert & the Medical College of Wisconsin** health network provides care for patients at 8 hospitals and 45+ locations in Eastern Wisconsin

The **Medical College of Wisconsin** is located on the Milwaukee Regional Medical Center Campus and has two regional campuses in Wausau and Green

TOP 5%
NATIONALLY IN NUMBER OF RESIDENTS TRAINED
>900 residents and fellows in training each year

3RD LARGEST PRIVATE MEDICAL SCHOOL IN THE NATION
7TH LARGEST US MEDICAL SCHOOL

TOP 5% worldwide in publishing new knowledge

1,650 PHYSICIANS
725 ADVANCED PRACTICE PROVIDERS

PHYSICIAN PRACTICE GROUP CONDUCTS
4.0 MILLION PATIENT VISITS ANNUALLY

MCW PRACTICING PHYSICIANS ACCOUNT FOR **67%** OF SE WISCONSIN DOCTORS LISTED IN *BEST DOCTORS IN AMERICA®*

Advanced Practice Providers

- Certified Anesthesia Assistant (CAA)
- Certified Nurse Midwife (CNM)
- Certified Registered Nurse Anesthetist (CRNA)
- Clinical Nurse Specialist (CNS)
- Nurse Practitioner (NP)
- Physician Assistants (PA)

APP Workforce & Organizational Structure

Advanced Practice Providers (APPs)

APRN & PAs

- Employed in the adult specialty practices
- Hired & managed in clinical Departments
- Formal and informal APP Department leaders

CRNAs and CNSs employed by the hospital

Centralized Office of Advanced Practice

Advanced Practice Director

3 Advanced Practice Associate Directors

Medical Education Coordinator

What is Transition to Practice (TTP)?

- Orientation, onboarding, & on-the-job training
- Intentional, role-sensitive education at the right time
- Socialization & professional modeling
- Standard and formal in other healthcare professions

Why is Transition to Practice Important?

Patients

PA/NP

Organization

Teams

Advanced Practice Transition to Practice

Structure and Resources

Competencies & Skills

Experiences

Education

Assessment

Growth mindset & Engagement

Coaching & Mentorship

Where do APPs fit in the organization?

What is the reporting structure?

Where do APPs align in the organization?

Who are the APP leaders?

APP TTP Organizational Connection

Where do leaders connect in the organization?

Who is accountable for APP TTP?

Who are the sponsors?

Who are the stakeholders?

Structure

Sponsorship
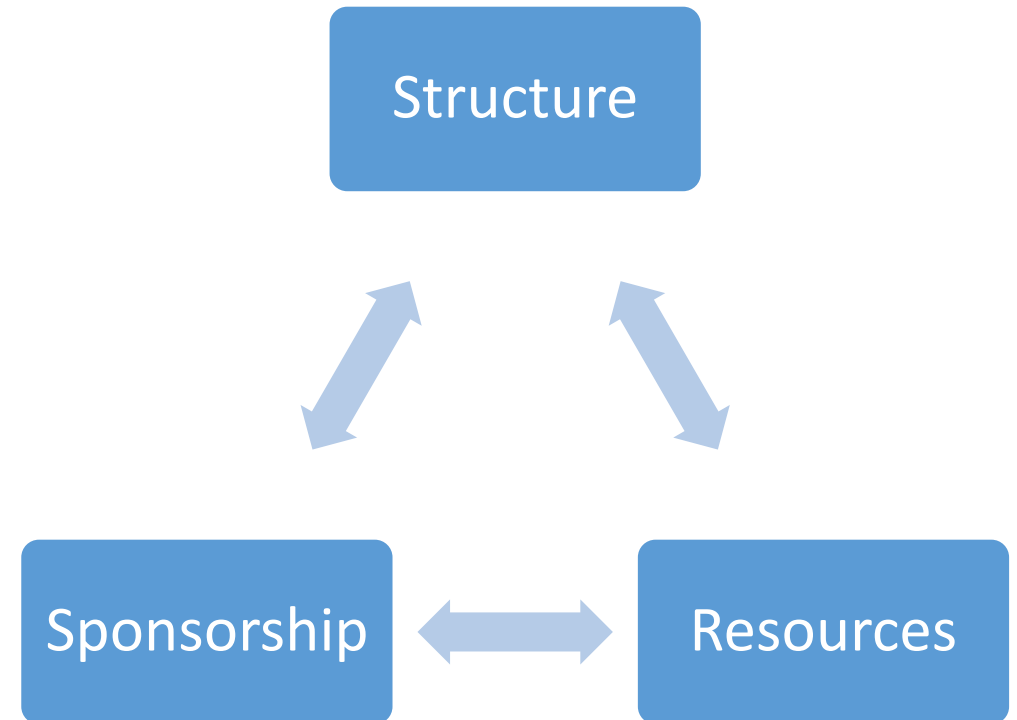
Resources

Your organization….

What can you do?
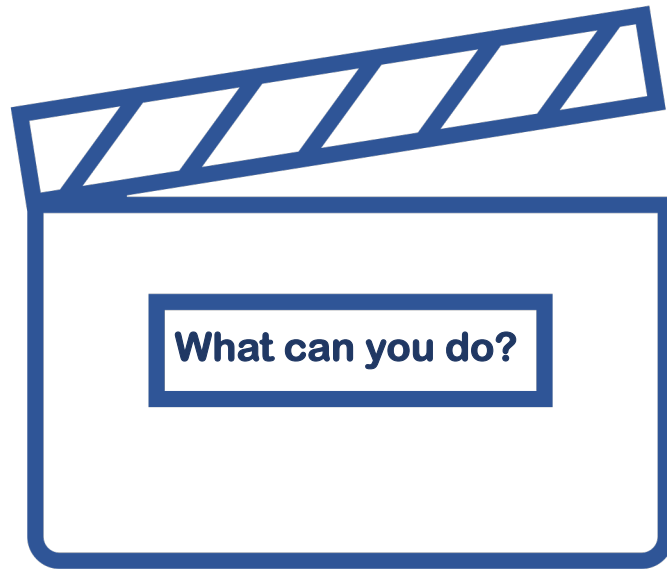
- Do an assessment
- Your TTP needs may be different than another organization
- This process is not static and will grow and adapt over time
- Go with the pull of the organization culture, structure, and resources

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What are the roles for APP Leadership in Transition to Practice?

Leadership Roles in Transition to Practice
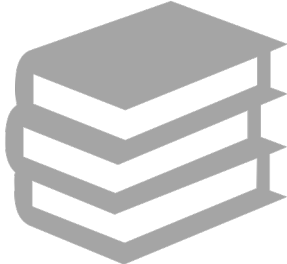
Local or Direct

Resource or Education

Organizational

Leadership Roles in Transition to Practice
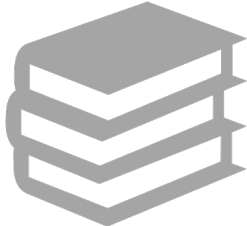
Local or Direct		Resource or Education		Organizational
Clinical preceptor or mentor	Coach	Mentor	Peer groups	APP manager
Advisor	Administration	APP education leader	APP onboarding leader	Fellowship directors

Which TTP Role do you Need?

What is the Goal?

- Teaching a task or specific skill?
- Resource for questions?
- Growth mindset?
- Self-direction and self-reflection?
- Advice?
- Management?
- Shared resources?
- Intense role training?
- Structured program?
- Career pathways?

1:1 Leadership Roles

- Preceptor
- Coach
- Mentor

Clinical Preceptor or Mentor
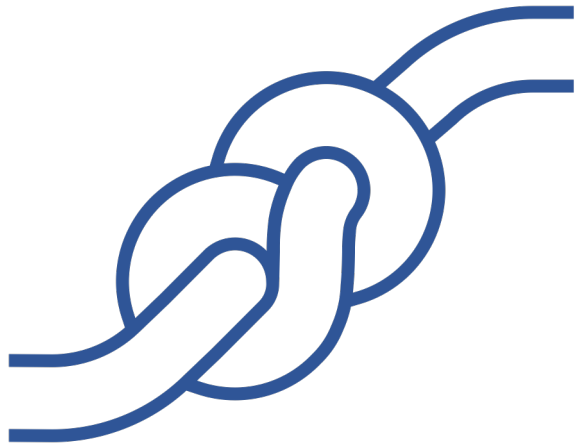
Showing the "ropes"

- Most common form of onboarding role
- A professional in a similar role
- Education in the role

Comparison of 1:1 Leadership Roles

- Local > Organizational
- Clinical and socialization focus during TTP

	Clinical Preceptor	Coach	Mentor
Education Goal	Learner Centric	Learner Centric	Bidirectional
Purpose	Task education	Reflective growth; self-directed	Guide Motivate & support
Structure	Structured Time-limited	Structured Time-limited	Formal or informal Long-term?
Assignment	Assigned	Assigned or Selected	Bidirectional choice
Expertise	Expert	Expert in guidance; direction	Experienced & Expert
Oversight	Supervision	Guide	Collaborative; relationship
Accountability	Preceptor Accountability	Learner Accountability	Supportive

Comparison of 1:1 Leadership Roles

- Start here with early TTP

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Comparison of 1:1 Leadership Roles

- Transition to coach
- Different skill set for both the learner and leader

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Coaching vs Coach with Wisdom vs Mentorship?

TABLE

Comparing and Contrasting 4 Forms of Guidance

Item	Advisor	Coach	Coach With Wisdom	Mentor
Focus	Specific event	Task/skill	Task/skill with long-term view in the field	Career; focus on character development, socialization into field
Expert	In target area	Global/not specific	In specific performance target	In same field, "been there" and shares
Control	Advisor directed	Learner directed	Mostly learner directed	Mentor directed with repeated interchanges
Strategy	Give advice or answer	Help learner find a strategy through asking clarifying questions	Combines coaching and mentoring on specific topic; when mentor, explicitly states he/she is doing so	After discussion with learner, mentor transmits information intentionally based on his/her own experience and expertise; networks learner with others in field
Benefits	None for advisor	No direct benefit for coach	No direct benefit for coach	Mutual benefit with mentor often involved in learner products
Time	Single session	Time limited, current	Time limited, current	Long-term, future oriented

Manager

Goal	Role support and growth
Purpose	Role and employment oversight and professional growth
Structure	Formal with direct oversight
Assignment	Hiring and structural
Expertise	May or may not have expertise
Oversight	Management and employment; assessment and performance reviews
Accountability	Role performance; Resources for growth

Group or System Leadership Roles

- System or local
- Peer or leader
- Resource development
- Programmatic

Peer Groups

Goal	Socialization; Professional growth & support
Purpose	Socialization; Connection to peers
Structure	Formal or informal; Coaching vs Social
Assignment	Assigned or spontaneous
Expertise	Similar level; May have an experienced leader
Oversight	None
Accountability	Social or professional accountability

Value:
- Peer & community learning
- Shared experiences
- Support self-directed learning & teaching others

Advisor or Coordinator
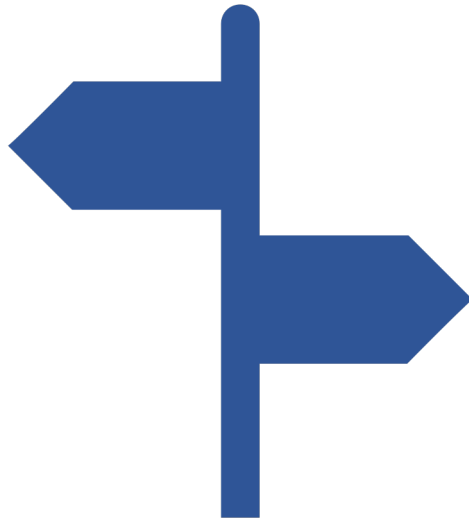
- Position or role to support multiple individuals
- Organization or local group
- Answer questions
- Connect to resources
- Coordinator for scheduling

Comparison of Formal* Leadership Roles

	APP Onboarding Leader	APP Education Leader	APP Fellowship Program Director
Education Goal	Develop and Operationalize TTP	Create education and resources for TTP	Develop a structured, long-term program to transition APPs to practice with a specific goal or training expertise.
Purpose	Effective and Efficient TTP for new APP	Resource and education creation	Provide programmatic oversight, management, and direction of the TTP program
Structure	Formal, Integrated Organizational or Local	Formal, Integrated Organizational or Local	Formal; Hired role Organizational or Local
Assignment	Formal or informal	Formal or informal	Formal position
Expertise	Expertise in APP practice, clinical skill Education knowledge	Expertise in APP practice, clinical skill Education knowledge	Expertise in APP practice, clinical skill Education knowledge
Oversight	Assessment of TTP progress and provides feedback Involved in reviews	Educator	Manager, educator, coach
Accountability	Progress in TTP; accountable to employer and learner	Assessment of skills Education development	Formative and summative assessment; Competency

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What is the right role for onboarding?

Organizational Assessment

Goal

Sponsorship

Prioritize

Create the Role

Challenge to APP Leaders

Develop	Identify	Lead
Develop a common terms and definitions	Identify best practices for the TTP roles	Build the case, resources, and structure for the roles

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How do you build the case for a transition to practice leader?

Organizational Connection

People

Local buy-in

Stakeholders

Executive sponsorship

Collaboration

Teams

Multi-professional

APPs

Visibility

Goals

Metrics

Strategic alignment

What's in it for me?

Stakeholders	Value

Stakeholders

- Patients
- Employer
- Hospital
- Departments/Clinics
- Provider Teams
- Physicians
- APPs
- All learners
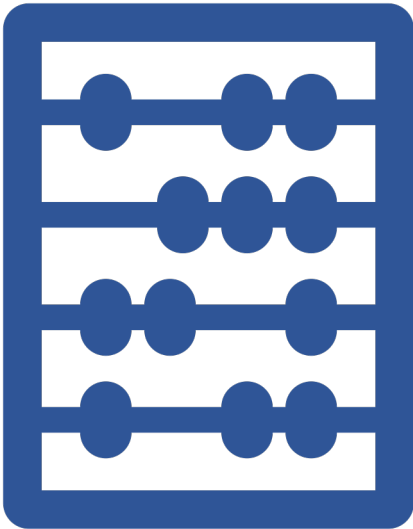- Multi-professional team

Value

- Team-based, multi-professional patient care
- Missions, brand & strategic plans
- Diversified APP recruitment and education
- Flexible staffing opportunity
- APP professional development and engagement
- APP TTP best practices and resources
- Clinical learning environment

The Business Case Structure

Reward

Outcomes

Investment

Costs

TTP Costs and Return on Investment

Reward

Investment

Outcomes

Costs

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Visibility of the TTP Leader and Recruitment Costs

Patient Access Costs

- Contribution of the APP to the team
- Time to ramp
- Access

APP Position Costs

- Salary
- Replacement vs new position
- Recruitment

TTP Leader Role Costs

- Role dependent
- Shared cost?
- Volume of recruitment

Identifying & Measuring
TTP Outcome Metrics

Recruitment and retention metrics

- Time to fill
- Open Positions
- Turn over
- Application volume & quality

Patient & Team outcomes

- Quality
- Access & Throughput
- Satisfaction

People

- Retention
- Diversity
- Engagement
- Job satisfaction
- Professional growth

Education Value

- Measure the outcome
- Confidence
- Translation to quality

TTP Investments

Resource Development

Role Development

Adoption & Spread

Reward

Professional and Leadership Growth

Collaboration & Mentorship

Culture & Engagement

Professional Identity

Improved Wellness & Burnout Reduction

And more...

Plan Do Study Act

Stakeholder feedback

Metrics

Dashboards

Program look backs

Find ways to visualize the unmeasurable

Evaluation

Adopt and Spread

Share resources

Reproduce successful models

Collaborate to expand

Business Case Examples for TTP APP Leaders

Clinical Preceptor	Development	Productivity	Recruitment	Patient quality & team outcomes	Professional Development	Culture & Mentorship	& More
Local Onboarding APP	Development	% Time	Recruitment	Patient quality & team outcomes	Resource and Process Development	Professional Development	Culture & Mentorship & More
Organizational Onboarding Leader	% Time	Resources & Support	Recruitment & Quality	Investment in resources	Learn, Share, Expand	Culture & Engagement	& More

Fellowship Business Case Example

- Strategically identify programs
- Not intended for all onboarding
- Define program goals, metrics, targets
- Understand cost and ROI
- Investment balanced with sustainability

Fellowship Case Example

Roles

- Program Director
- Program Educator/Administrator
- Education Collaborator
- Fellows

Costs

- Program administration and education leadership
- Fellow salary ($50,000-80,000 + fringe)
- Resources & structure

Investment

- Higher initial costs for development
- Fellow billing off-sets reduced salary
- Program costs off-set by outcomes & recruitment value
- Fellows are highly skilled & enculturated

Comparing ROI

New Grad Traditional Hire

Cost of traditional hire training

- Ramp at full salary & ramp billing
- New grad hire is less likely to cover salary and cost with ramp in the first year

Cost of traditional hire turn over

- Cost of new recruitment, ramp & training
- Turnover is not anticipated resulting in loss of patient access
- Understand average recruitment and retention rates
- Time to fill results in
  - Loss of patient revenue
  - Reduced patient access
  - Down stream impact

APP Fellow

Cost Savings from reduced cost of training

- Reduced direct costs of fellow during TTP and ramp

Cost Savings from turn over

- Anticipated completion
- No loss of patient access
- If fellows bill, their first-year cost is projected as neutral

Retention savings

- No ramp with full productivity at full salary
- Stem cell that can go to multiple clinical areas

Better fit (vs traditional)

- Informed retention by fellow and by hiring Department

Fellowship Program Metrics and Outcomes

APP Fellow Billing & Patient Impact
- Net neutral fellow salary
- Increased access

Recruitment Goals
- Recruitment event attendance with diverse demographics
- Application volume
- Impact to organizational recruitment & visibility

Retention
- Set retention goal
- Analyze data on fellow recruitment and retention statistics for prediction modeling and informing recruitment
- Measure long-term retention for APP fellows & career paths

APP Educators
- Adoption and spread
- Engagement
- Professional growth & leadership

Program Outcomes
- Goals
- Outcomes

The Cherry on Top

- Culture & Engagement
- Enculturation of patient centered & team-based care
- Cross department and multi-professional collaboration
- Local APP leadership and engagement
- APP professional development
- Improves onboarding and education for all hired APPs as it informs APP transitions to practice
- Recruitment diversity, visibility, differentiator
- Strategic alignment
- Scholarly contributions

How does Transition to Practice Connect to Leadership Development?

Leadership skills in TTP

Why?

- Foundational competencies
- PA/NP enter practice into a leadership role
- Intentionally develop leadership skills across the spectrum

How?

- Intentional education at the right time
- Time
- Support

What?

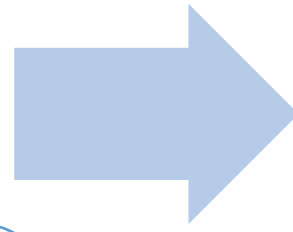- Education
- "Hands on experience"
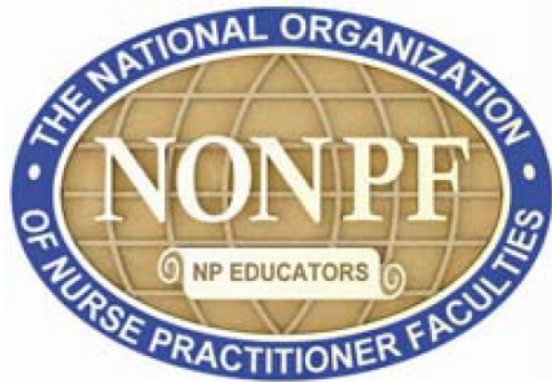- Support

PAEA 2018 Core Competencies for New Graduate PAs

| Patient-Centered Practice Knowledge | Society and Population Health | Health Literacy and Communication | Interprofessional Collaborative Practice and Leadership | Professional and Legal Aspects of Health Care | Health Care Finance and Systems |

Cultural Humility →

Self-Assessment and Ongoing Professional Development →

Figure 2. The six building block domains and two cross-cutting domains

PA Core Competencies

1. Patient-Centered Practice Knowledge
2. Society and Population Health
3. Health Literacy and Communication
4. Interprofessional Collaborative Practice and Leadership
5. Professional and Legal Aspects of Healthcare
6. Health Care Finance and Systems

Essential Skills

- Evidence Based Medicine
- Relationship Building
- Empathetic listening
- Interpersonal Skills
- Self Advocacy
- Self Awareness & Emotional Intelligence
- Bias Awareness
- Trust Building
- Teamwork
- Professional Role Awareness
- Accountability, Responsibility, Integrity
- System Thinking
- Safety
- Stewardship
- Quality Improvement & Problem Solving
- Leadership
- And more….

NP Competencies

THE NATIONAL ORGANIZATION OF NURSE PRACTITIONER FACULTIES
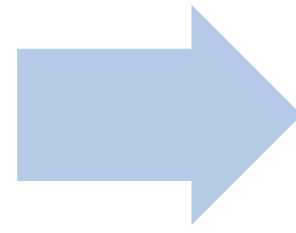
NONPF
NP EDUCATORS

NURSE PRACTITIONER CORE COMPETENCIES
April 2011
Amended 2012*

- Scientific Foundation
- Leadership
- Quality
- Practice Inquiry
- Technology and Information Literacy
- Policy
- Health Delivery System
- Ethics
- Independent Practice

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- **Teamwork**
- **Professional Role Awareness**
- **Accountability, Responsibility, Integrity**
- **System Thinking**
- **Safety**
- **Stewardship**
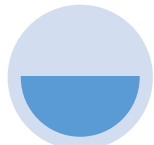- **Quality Improvement & Problem Solving**
- **Leadership**
- **And More…..**

How do we intentionally develop these skills?

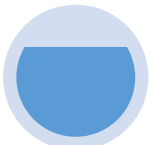Froedtert & MEDICAL COLLEGE of WISCONSIN
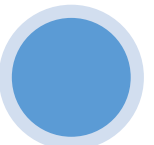
Is Competent the Goal?

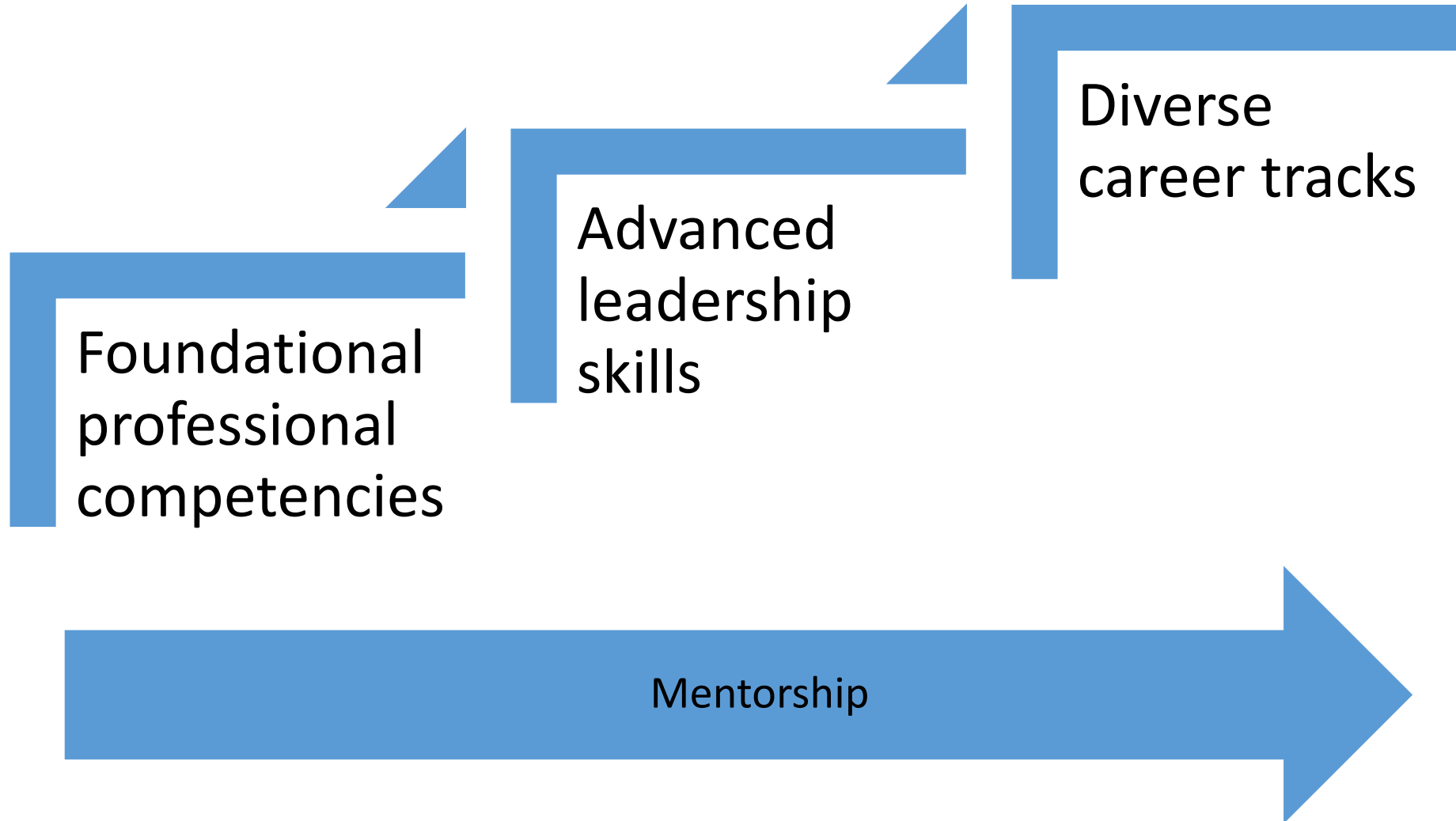Competent   Growth Mindset   Personal goals   Career Goals

Why is professional development important?

- Burnout Prevention
  - Role ambiguity
  - Culture & team dynamics
  - Career flexibility
  - Career development
- Improves Job Satisfaction
- Attrition Reduction
  - First job change on average of 3 years
  - Cost of turnover

Onboarding

Professional Identify Formation?

Prevention Strategies

Socialization

Mentorship

Essary et. al. 2018; Klein 2015, Quella 2021

Building the Professional Foundation

How do we encourage and assess professional growth beyond competency?
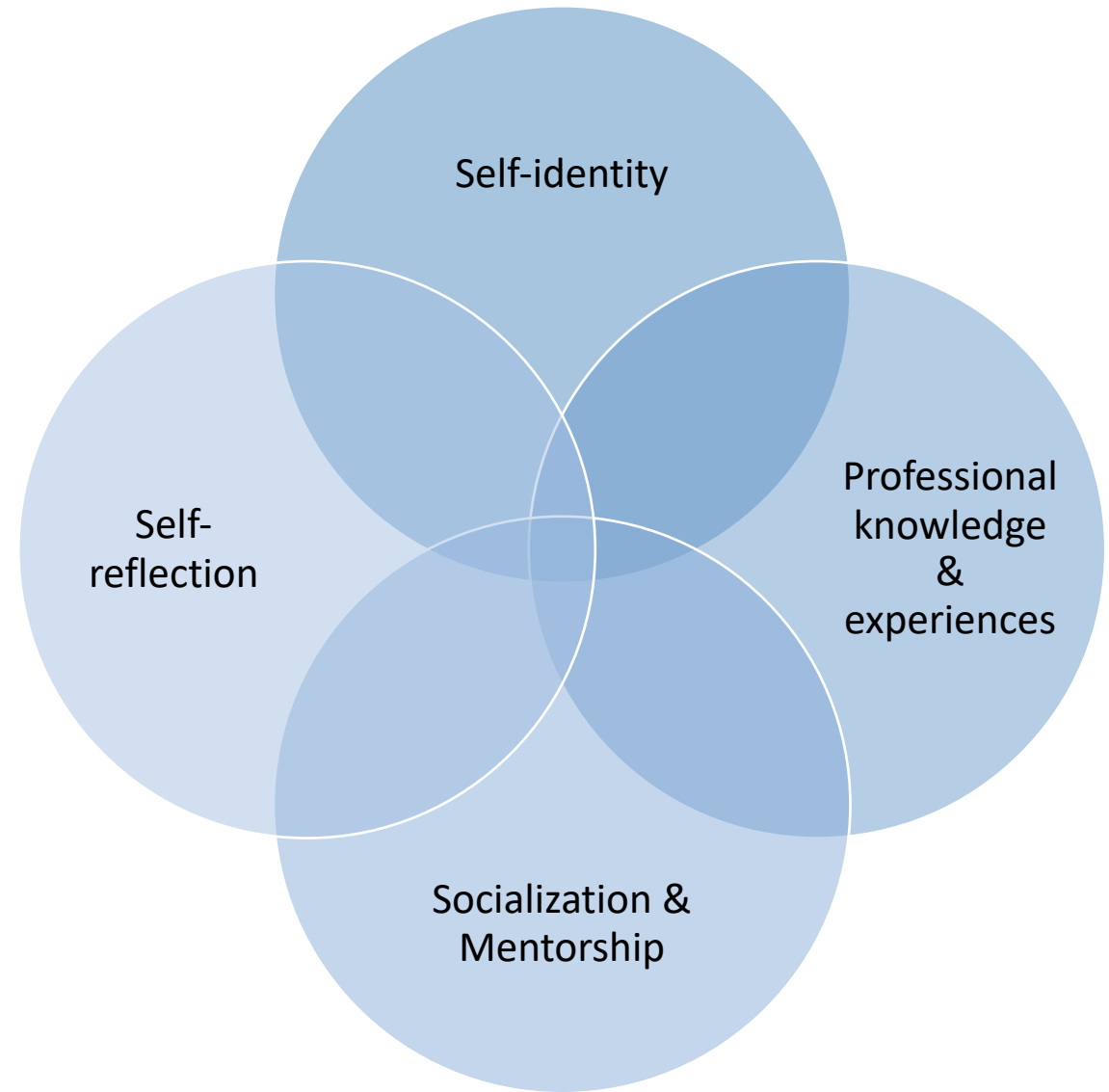
Character Development

- Promote growth of character
- Enhancing ethics, caring, community
- Education model in early through higher education
- Targets
  - Relationships
  - Happiness
  - Performance
  - Motivation
  - Confidence
  - Mindfulness
  - Community
  - Career growth & leadership
  - Social & emotional intelligence
  - More….

Character Strengths

- Wisdom
- Courage
- Humanity
- Justice
- Temperance
- Transcendence
- Respect
- Responsibility
- Trustworthiness
- Fairness
- Curiosity
- Citizenship

https://www.viacharacter.org

https://www2.ed.gov/admins/lead/character/brochure.html

Professional Identify Formation

- Transitional & ongoing growth of what it means to be a profession
- Social construct of the profession
- Linked to professionalism, ethics, citizenship

Self-identity

Professional knowledge & experiences

Self-reflection

Socialization & Mentorship

Cruess Acad. Med. 2015   Wald Acad Med. 2015

Role of Professional Identify Formation

Holden and colleagues ~

"[PIF] is the transformative journey through which one integrates the knowledge, skills, values, and behaviors of a competent, humanistic physician with one's own unique identity and core values. This continuous process fosters personal and professional growth through mentorship, self-reflection, and experiences that affirm the best practices, traditions, and ethics of the medical profession. The education of all medical students is founded on PIF."

Cruess and colleagues ~

"A physician's identity is a representation of self, achieved in stages over time during which the characteristics, values, and norms of the medical profession are internalized, resulting in an individual thinking, acting, and feeling like a physician."

Literature on PIF for physicians, pharmacists, nurses....What does it mean for PAs and NPs?

Envisioning Distinctive Professional Identity for Critical Care Advanced Practice Providers: Fostering Integrative Transformation Beyond Orientation

Parag N. Jain, MD[1]; Melissa B. Jones, MSN, APRN, CPNP-AC[2]; Satid Thammasitboon, MD, MHPE[3,4]
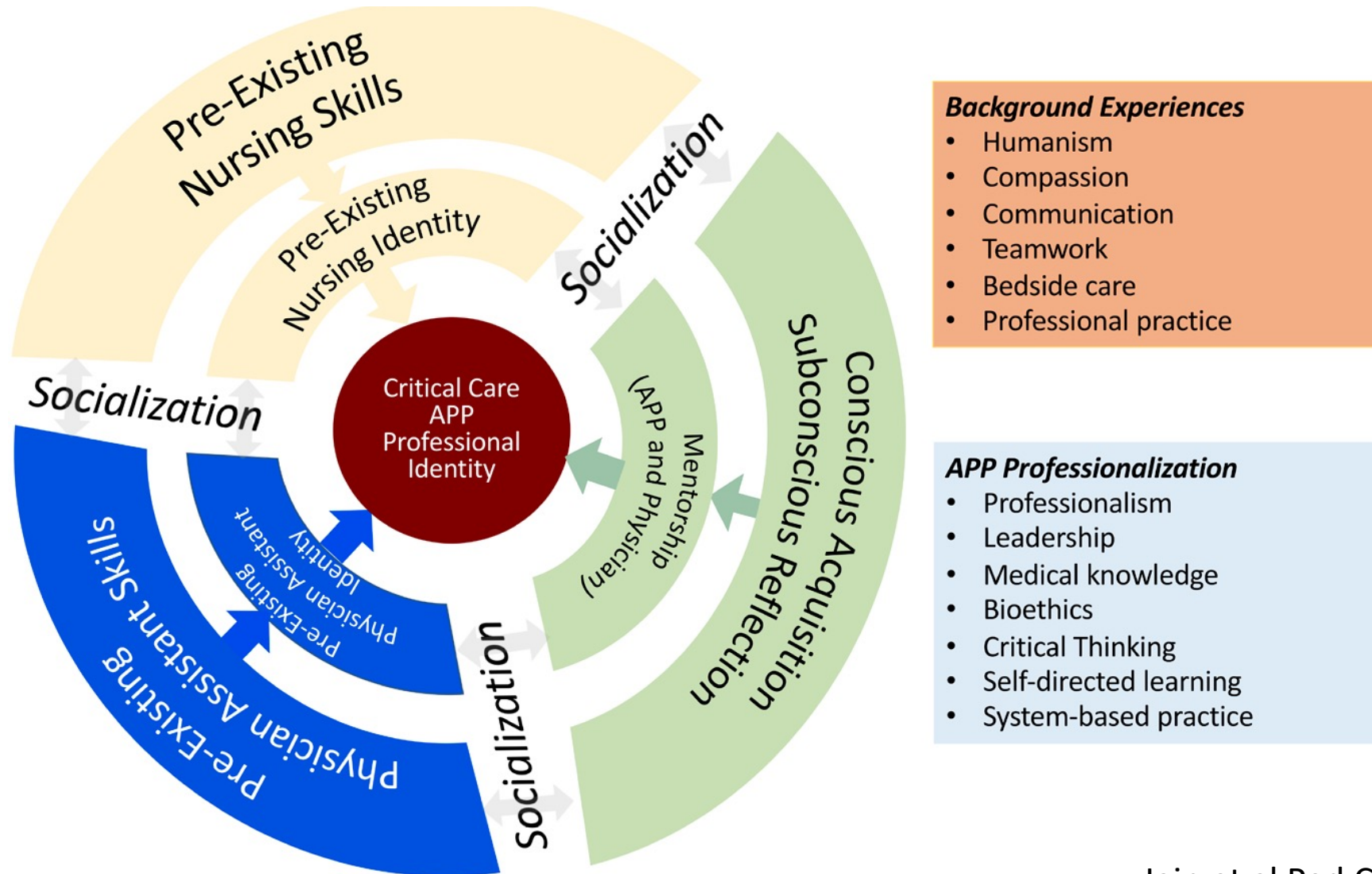
Jain et al Ped Crit Care 2020

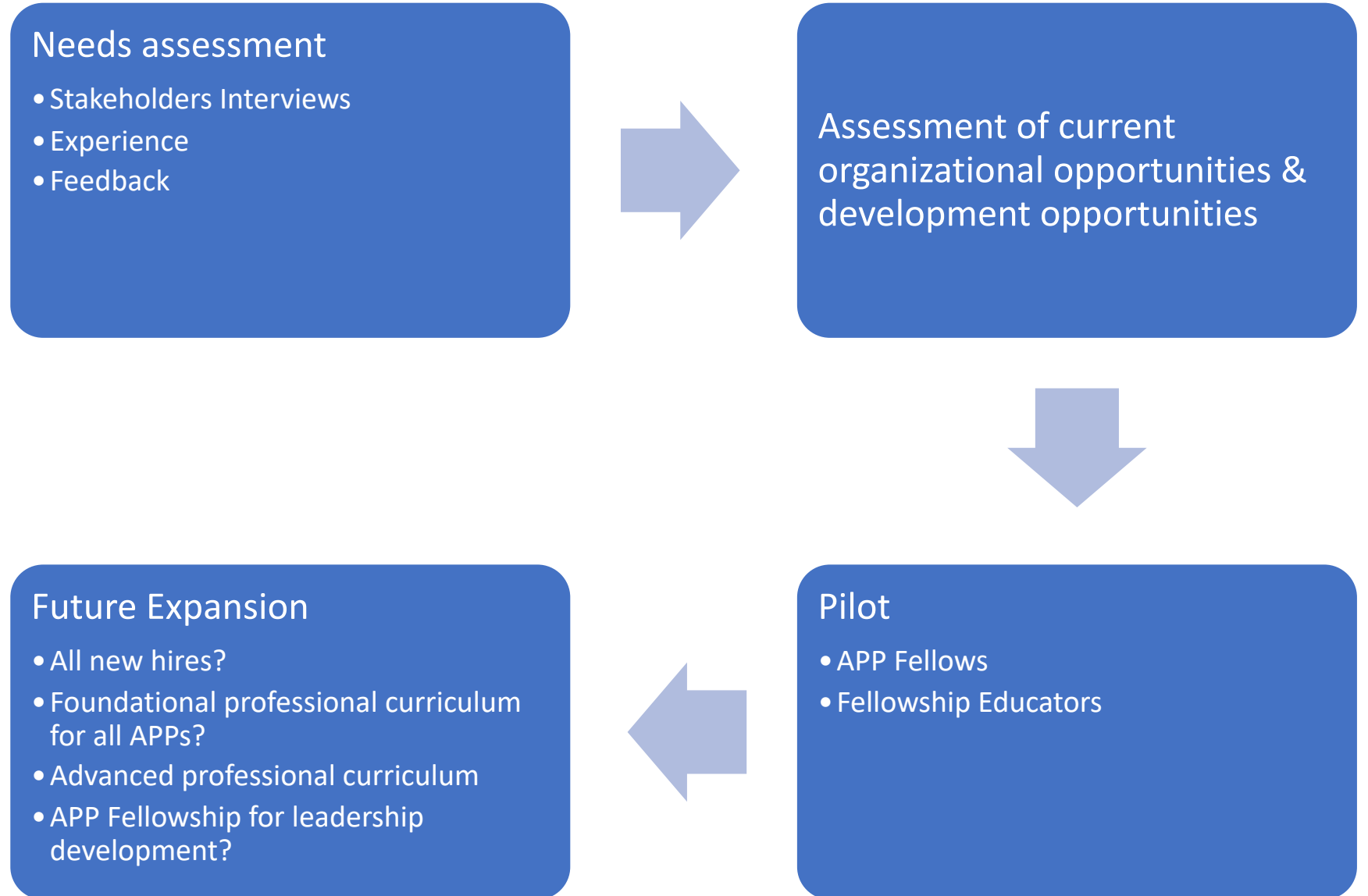# Pilot of APP Professional Curriculum

APP Professional Curriculum

Aim:

Create an innovative early-career advanced practice professional development curriculum integrating multi-modal education and a professional learning community to support advanced practice professional identity formation, develop leadership skills, and promote resiliency and well-being.

Goal:

- Promote APP growth mindset, self-reflection, and goal setting fostering long-term professional growth.
- Develop APP fellow and their educator's knowledge and confidence in essential professional skills including knowledge of their APP role, enhancement of communication and interpersonal skills, leadership development, and character development.
- Create community and connection of APPs across the institution, including development of coaching skills in APPs to foster professional growth and mentorship.
- Enhance visibility and demonstrate benefits of intentional APP professional skill and identity development including skill acquisition, well-being, and job satisfaction.
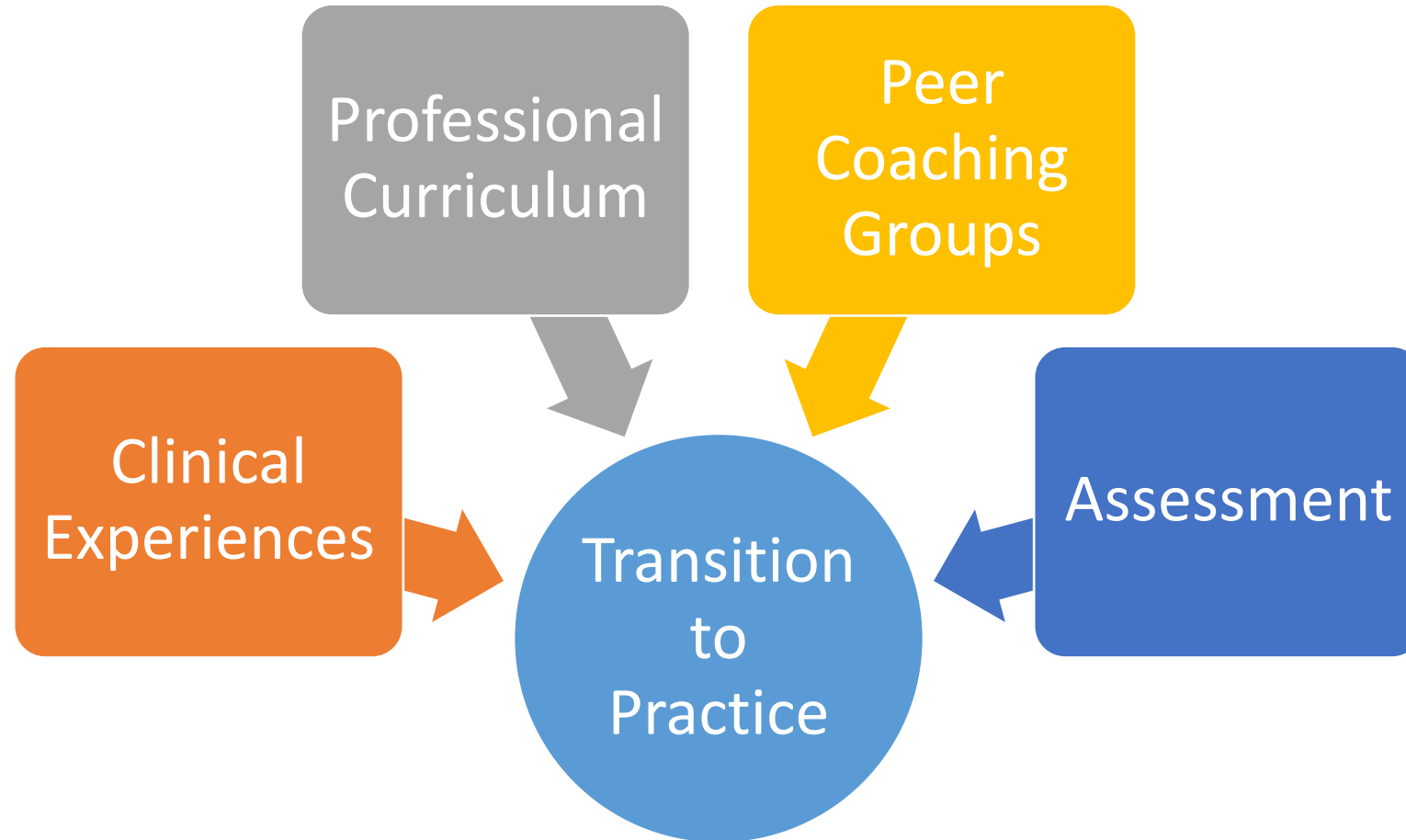
Professional Curriculum

PA & NP Practice and Role

- Introduction to Professional Curriculum
- Preparing for success: Real-life as an APP
- Professional and Team communication
- Foundational Education, Practice, Regulations, Advocacy
- Team and system-based care; APP roles, Practice models
- Introduction to leadership and career development

Professional, Leadership skills, Interpersonal Communication

- Introduction to professional development
- Increasing your emotional intelligence
- Crucial conversations & accountability light
- Influencing without authority
- Leading through change
- Customer service excellence
- Trust and relationship building

Problem Solving

- Introduction to problem solving
- Change management in problem solving
- Focus PDSA

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Professional Curriculum

Transition from Fellowship to Career	Diversity & Inclusion	Resiliency, Empathy, Wellness	System, Technology, & Healthcare Improvement
• Identifying and applying for jobs • CV/resume workshop • Professional job transition	• Welcoming diversity workshop • Unconscious Bias: From Acknowledgement to Action • Mitigating the sting of Microaggression: How?	• Reviving the heart • APP wellness index & resources • Additional organizational resources • Peer Support	• Library and research orientation • IHI Open School • Additional system, communication, and EBM resources

Small Group Coaching Sessions

Goal

- Connection & community experience learning
- Socialization
- Professional growth

Coaching Sessions

- Experienced APP – peer leaders
- 5-8 fellows

Outline

- Topic-based sessions
- Discussion-based
- Coach & question guided

Coaching Session Topics

- Wellness Strategies
- Communication and Inclusion
- Team Collaboration & APP Role
- Character
- Professional Identity
- Professional Growth & Goal Setting

Assessment

Professional Identity Evaluation (PIE) Assessment

- Validated in multiple professions
- Stages growth
- Tool for framing professional growth, feedback, and remediation

Interpreted by experts

1. What does being a member of the nurse practitioner or physician assistant healthcare professions mean to you? How did you come to this understanding?

2. What do you expect of yourself in your day-to-day work as a member of the healthcare professions?

3. What will your profession expect of you?

4. What conflicts do you experience or expect to experience between your responsibility to yourself and others - patients, family, and your profession? How do you resolve them?

5. What would be the worst thing for you if you failed to live up to the expectations you have set for yourself?

6. What would be the worst thing for you if you failed to live up to the expectations of patients?

7. What would be the worst thing for you if you failed to live up to what the society expects of members of your profession? How did you come to this understanding?

8. Think of a *healthcare professions* you look up to whom you consider to be an exemplar of professionalism. Describe why you chose this person, illustrating with an incident or pattern of decisions or actions that supports your choice.

9. Reflect on your experiences in your work or training that have been critical in fostering change in your understanding of what it means to be a *healthcare professional.*

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PIE Assessment Results

Kalet, Buckvar, Monson 2018
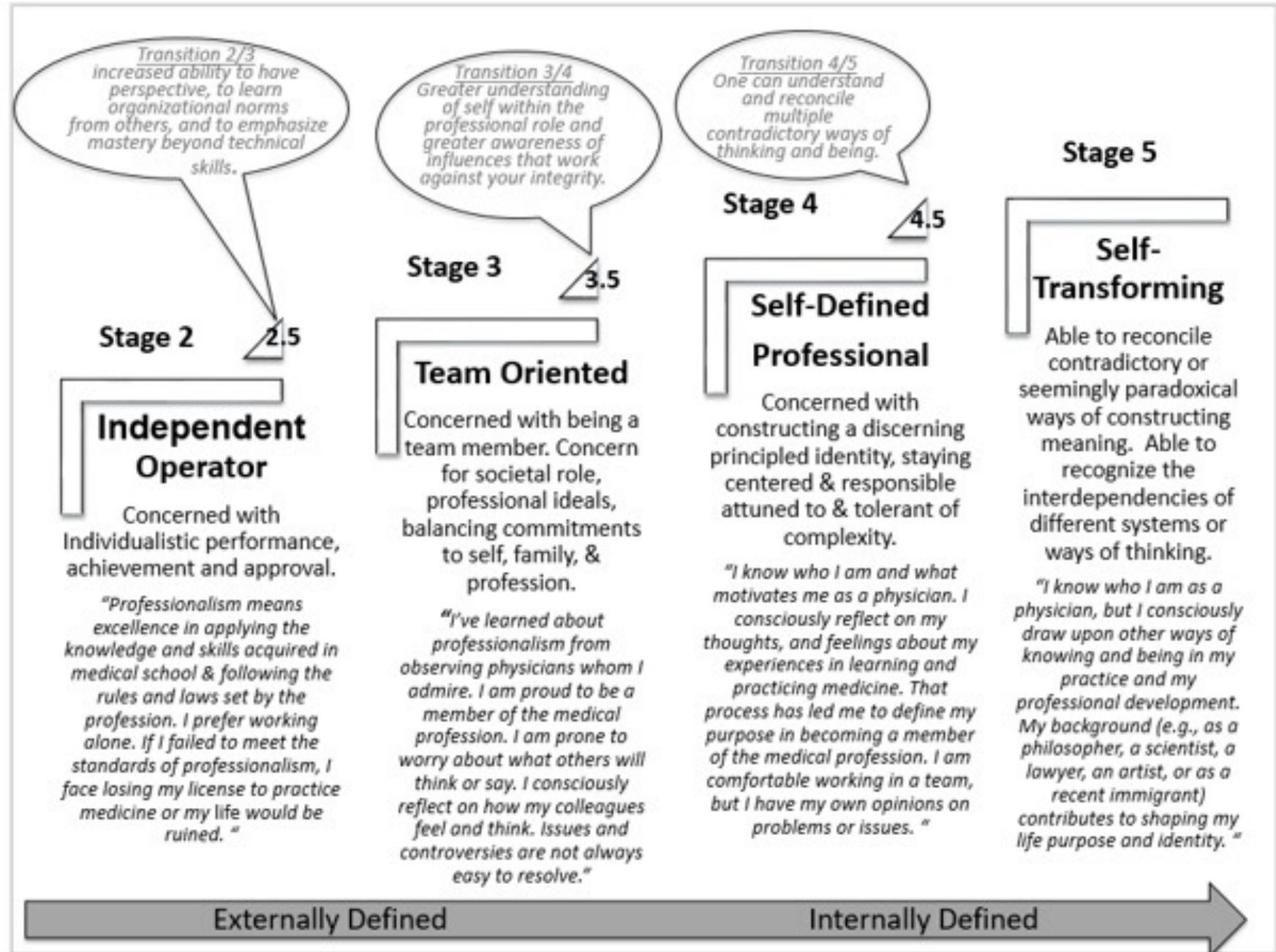
Other Assessment

- Skill Development & Confidence Assessment
- Character Development
- Tools
  - Wellness
  - Job Satisfaction
  - Leadership competency & development
- **We have opportunity to identify and standardize assessment methods!**

Program Evaluation

Topic Evaluation

Track and Curriculum Evaluation

Discussion & Feedback

Engagement & Responses

APP Leader Action Steps

- Define TTP leadership roles & best practices
- Advocate for the right TTP leadership roles
- Increase visibility of TTP leadership ROI
- Integrate professional curriculum from the start
- What is the role of professional identity for PAs and NPs?
- How are we going to assess and share?

Froedtert & MEDICAL COLLEGE of WISCONSIN

Questions

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