California Simulation Alliance (CSA)
Simulation Scenario Template
Leadership Specialty

The California Simulation Alliance (CSA) is comprised of simulation users from all disciplines from throughout the state. Several regional collaboratives have formed totaling 7 as of March, 2011: The Rural North Area Simulation Collaborative (RNASC), the Capital Area Simulation Collaborative (CASC), the Bay Area Simulation Collaborative (BASC), the Central Valley Simulation Collaborative (CVSC, the Southern California Simulation Collaborative (SCSC), the Inland Empire Simulation Collaborative (IESC), and the San Diego Simulation Collaborative (SDSC). HealthImpact, a non-profit organization focused on workforce development in healthcare provides leadership for the CSA.

The purpose of the CSA is to become a cohesive voice for simulation in healthcare education in the state, to provide for inter-organizational research on simulation, to disseminate information to stakeholders, to create a common language for simulation, and to provide simulation educational courses. The goals of the alliance will include providing a home within HealthImpact for best practice identification, information sharing, faculty development, equipment/vendor pricing agreements, scenario development, sharing and partnership models. More information can be found on the CSA website at www.californiasimulationalliance.org

All scenarios have been validated by subject matter experts, pilot tested and approved by the CSA before they were published online. All scenarios are the property of the CSA. The writers have agreed to waive any and all of their individual intellectual property (I.P.) rights surrounding all scenarios. I.P release forms can be obtained by emailing KT Waxman at kt@healthimpact.org.

SECTION I: SCENARIO OVERVIEW

1   Original CSA template modified for Leadership Development 8/13/13 by C. Delucas, revised 2.17 by KT Waxman

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Scenario Title:	Leadership Competencies for Succession Planning - Executive Authentic Behaviors
Original Scenario Developer(s):	Beth Eichenberger
Date - original scenario	April, 2017
Validation:	Dr. KT Waxman, M. Miller, MA, BSN, CHSE
Revision Dates:	
Pilot testing:	Volunteers from USF ELDNP Cohorts 6, 7, and 8
Learner Level:	Experience to Expert

Estimated Scenario Time: 15 minutes

Estimated Debriefing time: 10 minutes

Target group: Emerging Nurse Executives and Nurse Leaders

Leadership Competencies: Leadership, Communication and Relationship Management, and Professionalism (AONE, 2015)

Framework: Authenticity- (Optional, not in template)
Skills:
A. Aligns actions with clear personal values and commitment to the organization's mission
B. Communicates effectively, asserting one's observations and perspectives
C. Leads with courage and heart
D. Establishes an environment where people feel valued, trusted and confident
E. Promotes a Just Culture (non- punitive) with a supportive reporting environment
F. Models professional practice standards and leadership behaviors

Brief Summary of Case:
A nursing director is being considered as a candidate and successor for the nurse executive role. She is being evaluated for this new role based on her ability to appropriately demonstrate alignement and attunement without over identification with the person or incident . She must display and distinguishing her role as leader, responsible for upholding policy, and establishing a fair review process. This case involves a patient complaint against an RN.

EVIDENCE BASE / REFERENCES (APA Format)
American Organization of Nurse Executives. (2015). *The AONE nurse executive competencies*. Retrieved from: http://www.aone.org/resources/nec.pdf

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HealthImpact
Optimizing health through nursing

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Hyatt, M., (2017). The 5 marks of authentic leadership. Retrieved from: http://michaelhyatt.com/the-five-marks-of-authentic-leadership.html

Leach, S. L., Cassingham, B., Greenberg, E., Hodges, P., Huston, C., Lang, M., & McFarland, P. (2016). *Leadership development competencies. California action coalition: future of nursing initiative #7:leadership*. Retrieved from https://acnl.memberclicks.net/assets/docs/webinarversion_7_21_15_leadership%20competencies

Martin. (2016). Authentic leadership guide: definitions, qualities, pros & cons, examples. Retrieved fro m: http://www.cleverism.com/authentic-leadership-guide/

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SECTION II: CURRICULUM INTEGRATION

A. SCENARIO LEARNING OBJECTIVES
Learning Outcomes
1.   Differentiate between alignment (getting too close personally) & attunement (the ability to remain objective while showing compassion) that facilitates effective consensus building & trust.
2.   Create value - establish an impact to help move participants towards common goals and desired outcomes
3.   Demonstrate the ability to make decisions based on own beliefs, values, inferences
4.   Exhibit emotional intelligence
Specific Learning Objectives
1.   Display your own authentic behaviors in leading the investigation/discussion
2.   Establish a trusting relationship to earn credibility
3.   Create consensus for managing through the situation by using the "Just Culture" strategy as your guide
4.   Differentiate between alignment and attunement
5.   Demonstrate transparency,
Critical Learner Actions
1.   Display your own authentic awareness and behaviors established during reflective practice
2.   Establish an environment that fosters appropriate alignment and attunement for consensus building and appropriate outcomes
3.   Demonstrate how you would align your actions with your core values and the organization's mission to evaluate and determine the outcome for the current situation
4.   Create alternative outcomes by using the Just Culture Algorithm

B. PRE-SCENARIO LEARNER ACTIVITIES	
Prerequisite Competencies Required prior to participating in the scenario	
Knowledge	Skills/ Attitudes
X Complete assigned readings prior to simulation	X Take survey prior to simulation
X Dress appropriately for the role	X Engage fully through active listening and a positive approach
X Remain open to the learning experience	X Display respect for the process and others
X Finish the pre-simulation survey	❑
X Be open to engage in the experience with curiosity	❑

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SECTION III: SCENARIO SCRIPT

A. Case summary
A staff nurse with over 30 years of experience was accused by a patient of taking a piece of her jewelry. The nurse was a loyal employee with over 15 years experience and no previous patient complaints. In fact, she received compliments from her patients, as well as her co-workers for her collaboration and teamwork. Although the CNE is willing to listen to the RN's explanation, the director wants to meet with the HR Director first, in order to outline a plan based on findings from an investigation and using the Just Culture Algorithm. You are the director who believes herself to be an authentic leader who aspires to be a CNE in the next year or two. In your heart you want to make sure that the appropriate review and actions are taken.

B. Key contextual details
The staff RN has a long career without prior complaints or accusations of stealing. The situation with the patient was not fully investigated, leaving some doubt & gaps in information. A timeline was not established for the series of events leading up to this accusation. The director aspires to become a nurse executive over the next two years and has been asked to demonstrate leadership behaviors that could influence senior leaders in considering her for this promotion. The director is conflicted; she doesn't believe this nurse is guilty in her heart, yet knows that she has an obligation to investigate, ask questions, and ensure policy was followed based on the patient's complaint, She must rely on her core beliefs and values to assess the situation from an ethical and just perspective, no matter what the outcome may be. In the scenario for executive authentic behaviors, the director will be meeting with the HR Director in order to build consensus for a plan prior to presenting to the CNE. She has to display behaviors that will hold herself and others accountable for their mutual professional expectations and outcomes during the investigation. This may be done by creating the atmosphere where there is trust by displaying her own authentic behaviors, leading from her heart and showing her emotional intelligence as a fair and courageous leader.   Your job now is to decide how to proceed in this situation. Please take a few minutes to think about the scenario, then **demonstrate the** authentic leadership **behaviors** you would use to manage through this situation. Please use the elements on page one and any other authentic leadership attributes that you believe to be relevant to this situation as your guide.

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C. Scenario Cast		
Leaders/others	❑ High fidelity simulator	
	❑ Mid-level simulator	
	❑ Hybrid (Blended simulator)	
	❑ Standardized patient	
Role	Brief Descriptor (Optional)	Actor/Confederate (A/C) or Learner (L)
PCS Director		L
CNE		A
HR Director		A

Environment, Equipment, Essential props Recommend standardized set ups for each commonly simulated environment
1. Scenario setting: (example: office, board room, patient room)
HR Director in office with PCS Director

2. Equipment, supplies, monitors (In simulation action room or available in adjacent core storage rooms)					
Small table/chairs					
Computer/Monitor					
Paper					
Video Equipment (op)					

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CASE FLOW / TRIGGERS/ SCENARIO DEVELOPMENT STATES			
Initiation of Scenario: Patient Care Service (PCS) Director is invited into the HR Director office.			
PARTICIPANT STATUS	**DESIRED LEARNER ACTIONS & TRIGGERS TO MOVE TO NEXT STATE**		
1. Role or position HR Director Director Director is invited into the meeting per her request to discuss the situation with the HR leader. She believes that the CNE may be considering termination of this employee	**Triggers:**	**Learner Actions** The director felt she was at a disadvantage knowing what action the CNE would like to take. The Director presents her findings from her investigation. She suggests that they review the Just Culture algorithm together.	**Debriefing Points:** How did PCS director respond to the initial situation? Was she authentic as she presented a different perspective during this period? Did she make eye contact? Was she fully prepared, organized and focused? Describe the director's behaviors during this period. Was she able to establish appropriate alignment and attunement? Was she able to approach the situation "clear headed" and dispel any pre-judgments she may have or emotions she may feel that could impact her ability to be unbiased?
2.PARTICIPANT STATUS	**DESIRED ACTIONS & TRIGGERS TO MOVE TO NEXT STATE**		
HR Director Director HR Director listens to rationale of the Director and states that she finds merit in her point of view. HR asks the director to consider the risk to the organization's reputation.	**Triggers:**	**Learner Actions:** The director, although feeling intimidated, wants to demonstrate her ability to be true to her values and advocate ethically for the results of the fair investigation and Just Culture results.	**Debriefing Points:** Does the director appropriately set the stage for her presentation of her perspective? What behaviors is she exhibiting? Is she displaying her own true core values and ethical stance? Was she able to facilitate alignment and attunement?

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PARTICIPANT STATUS	DESIRED ACTIONS & TRIGGERS TO MOVE TO NEXT STATE		
CNE Director HR Director The CNE asks for the results of the investigation.	**Triggers:**	**Learner Actions:** The PCS director begins the discussion of her investigation and assessment through the use of the "just culture" algorithm. The Director provides her SBAR including a risk analysis with recommendations to the CNE. The CNE requests feedback from the HR Director, who indicates that he supports the recommendations based on the process that was followed. .	**Debriefing Points:** Does the director exhibit authentic behaviors during this time? Was she able to build trusting relationship to acquire credibility? Will she be able to create consensus for managing through the situation by using just culture as her guide? How do they appear to be responding? Was she able to facilitate alignment and attunement? Does the director display the critical learner actions throughout this scenario?

Scenario End Point: The CNE agrees that a disciplinary action may be appropriate, but not termination. She wants to review the case with the Risk Manager prior to making a final determination.

Suggestions to <u>decrease</u> complexity: This scenario could have the CNE be more sympathetic (that is alignment), but keeping her objective, a bit detached, and objective. The CNE helps the student explore what it is like to present the case, express her beliefs, make recommendations that are appropriate for the offense, aligned with Policy (not the person) while showing compassion for how difficult this whole experience must be for a long-time, loyal, and upstanding nurse by reputation until this complaint was brought forward

Suggestions to <u>increase</u> complexity: CNE does not want to follow the policy and process for decision making. She wants to terminate and remove the potential risk of this RN remaining in the organization immediately.

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APPENDIX A: Optional digital images of scenario milieu/set-up

Insert digital photo here	Insert digital photo here
Insert digital photo here	**Insert digital photo here**

APPENDIX B: DEBRIEFING GUIDE

General Debriefing Plan			
x ☐ Individual	x ☐ Group	X ☐ With Video	☐ Without Video
Debriefing Materials			
X ☐ Debriefing Guide	X ☐ Objectives	X ☐ Debriefing Points	
Core Leadership Competencies to Consider for Debriefing Scenarios			
X ☐ Leadership	X ☐ Teamwork/Collaboration		X
☐ Communication	☐ Human factors		☐ Systems thinking

Sample Questions for Debriefing
1. How did the experience of (identify the human factor) in leadership feel for you?
2. Did you have the knowledge and skills to meet the learning objectives of the scenario?
3. What GAPS did you identify in your own knowledge base and/or preparation for the simulation experience?
4. What RELEVANT information was missing from the scenario that impacted your performance? How did you attempt to fill in the GAP?
5. How would you handle the scenario differently if you could?
6. In what ways did you feel the need to check the ACCURACY of the data you were given?
7. In what ways did you perform well?
8. What three factors were most SIGNIFICANT that you will transfer to your leadership/management setting?
9. Consider the potential leadership and managerial benefits of improving your _____(name the soft skill) expertise.
Notes for future sessions: