

# Sustaining Excellence: Knowledge Transfer and Strategic Planning in Nursing Leadership

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Throughout my 32-year nursing career, I have been shaped by the insights and experiences of many talented individuals who have profoundly influenced my professional journey and taught me how to innovate and improve my professional practice. As I approach retirement, I find myself reflecting on proactive strategies to share my knowledge and mentor the next generation of leaders to effectively navigate healthcare system challenges and improve patient outcomes.

The recent 2024 Longitudinal Nursing Leadership Insight Study revealed some concerning trends: while the emotional health and well-being of nurse leaders are at their highest since 2020, nearly one-third (31%) plan to transition to different roles within a year. Additionally, an estimated 70,000 nurses, including leaders, are expected to retire annually. This signals a significant loss of invaluable leadership insight in our field (Magri et al., 2024).

## The Need for Knowledge Transfer

To address an impending shortage of nurses and nurse leaders, healthcare organizations need to develop a new generation of nurses with the leadership

skills who can effectively lead teams in providing high-quality care. In the context of succession planning, “knowledge transfer” refers to the process of sharing both organizational and technical knowledge from current leaders to their successors. The goal of knowledge transfer is to ensure that skills and information are disseminated among employees, teams, and across various departments, making them accessible to both current and future staff.

## Challenges in Current Leadership Development

High turnover rates and the promotion of nurses into leadership roles without adequate training pose significant challenges. Research by Warshawsky and Cramer (2019) indicated that many Millennial nurse managers enter their roles with less than four years of leadership experience, leading to a steep learning curve that can hinder their effectiveness. Although these individuals often excel in clinical skills and patient care, they frequently lack formal leadership training.

Implementing a formal nurse manager succession-planning program can reduce replacement costs and transition times

(Phillips et al., 2018). This strategy not only fosters an internal pipeline of future leaders but also enhances retention rates and job satisfaction (Martin & O’Shea, 2021). Studies by Roth and Whitehead (2019) and Ramseur et al. (2018) demonstrated that novice leaders with strong mentors during their succession planning felt more prepared and confident in their new roles (Ashley & Marsh, 2019; Menjivar, 2023). Mentorship has been recognized as a powerful resource for reducing and combatting workplace burnout (Cavanaugh et al., Overall, prioritizing leadership development within structured succession programs can significantly enhance both nurse retention and the quality of leadership in healthcare organizations (Selig, 2020).

Bandura’s social learning theory (Bandura, 1977) posited that learning is most effective when individuals observe others in everyday contexts. In formal succession planning, anticipated leader behaviors can be demonstrated through various methods, including visual aids, presentations, role modeling, and imitation (Rofcanin et al., 2018). These programs create opportunities for individuals to replicate leadership experiences and tackle challenges, facilitating the development of new response patterns.

Lacross et al. (2019) demonstrated that a 90-day pilot nurse manager succession-planning program significantly enhanced participants’ readiness for management roles and leadership behaviors. After completing the program, prospective nurse managers reported increased confidence in their leadership competencies and resilience. Additionally, cross-training and mentoring facilitated

a smoother transition for participants, emphasizing the importance of knowledge retention and transfer within succession planning (Lacross et al., 2019). When implemented strategically, succession planning can improve employee retention, engagement, and financial performance.

In 2021, Norton Children's Hospital began an innovative hybrid program to develop strong leadership competencies, critical skills, and empowerment for bedside nurses (Kirk & Spell, 2024). Their program coupled online micro-learning (short videos across different leadership domains) with in-person enrichment opportunities, including formal mentor support and structured organizational events. This program boosted staff engagement, enhanced overall satisfaction, improved nurse retention, and positively impacted patient outcomes.

### Knowledge Building in Nurse Leadership Succession

As older nurse leaders approach retirement, formal succession programs are vital for transferring knowledge to their successors. Knowledge sharing can occur through both informal methods, such as mentoring and coaching, and more structured classes led by experts in specific areas. Given the ongoing changes in healthcare, having experienced leaders is essential to effectively navigate evolving service lines and regulatory requirements.

### Strategies for Nurse Leader Development

1. Nurses have long realized that lifelong learning is a necessity to promote ongoing professional competency to support the best patient outcomes. This mindset should include developing leadership skills to support career advancement. Ongoing membership in nursing professional organizations is crucial to influence health care policy decisions, while simultaneously offering opportunities to network, meet experts in the field, and develop lifelong connections.
2. **Define Succession Planning Goals:** Establish clear goals for the succession planning program, focusing on retaining talent, enhancing leadership skills, and ensuring a smooth transition during leadership changes. Regularly review the succession planning strategy to adapt to changing organizational needs, workforce demographics, and healthcare trends.
3. **Maintain a Deep Pool of Candidates:** Organizations should cultivate a broad base of potential leaders who are ready for training and can step into roles as they become available. Magnet® requires organizations to implement and use mentoring and succession planning programs under the transformational leadership standard.
4. **Peer-to-Peer Shadowing:** Implement shadowing opportunities to prepare future nurses for leadership roles through direct experience.

5. **Cross-Training and Mentoring:** Utilize cross-training and mentoring to equip employees for future positions, ensuring continuity of work during absences.

### Implications for Nursing Practice

Nurse leader succession planning and leadership development are crucial in addressing the impending shortage of nurse managers and fostering essential leadership competencies. Healthcare institutions must proactively prepare nurses for management roles to maintain a strong pipeline of qualified candidates. Participation in formal development programs and engagement with professional nursing organizations enhances leader readiness to fill vacancies, ensuring organizational stability. To effectively implement these programs, organizations should assess their succession planning needs and evaluate the potential return on investment. ■

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