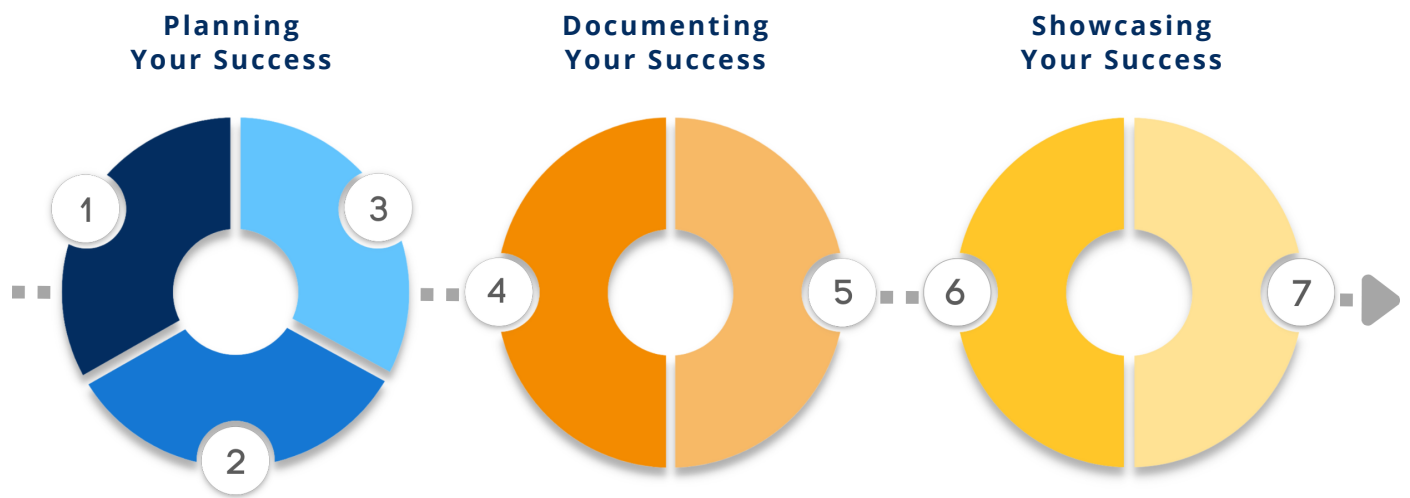


## MAGNET PROCESS WORKFLOW

Our seven-stage approach is flexible and education-focused; tailored to meet any organization's timeline and budget requirements, while also addressing the individual development goals of our nursing partners.



Stage 1:

### Organizational Analysis & Evaluation

In stage one we'll partner closely with the Magnet Program Director (MPD) and other key stakeholders to complete a comprehensive gap analysis and evaluation of your organization.

Specifically, we'll be assessing various data points (such as patient and nursing satisfaction scores) and evaluating your professional practice structures and processes as they relate to the Magnet Recognition standards of excellence.

This initial assessment helps us to understand where the organization currently stands in relation to meeting the Magnet criteria. The assessment also helps us to identify existing areas of excellence as well as any opportunities for improvement.

Once the evaluation is complete, and these opportunities for improvement are identified, work will commence (in stage two) to prioritize those issues and address gaps.

#### STAGE 1 ACTION ITEMS:

- ✓ Reviewing general eligibility requirements (data, leadership, etc.)
- ✓ Initial data assessment (RN Sat, PSat, NSI, Amb NSI, certifications, degrees, turnover, vacancy)
- ✓ Organization-wide assessment of key elements in TL, SE, EP, NK sections of Magnet manual
- ✓ Unit/department level asset mapping (strengths, weaknesses, risks)
- ✓ Identification of Macro / Meso / Microsystem-level gaps:
  - Assess & Evaluate System & Programmatic Gaps
  - Assess & Evaluate Data Gaps
  - Assess & Evaluate Unit-Level Gaps
  - Risk Assessment: Identified Gap in relation to Magnet Designation Need



### Stage 2:

## Gap Prioritization & Strategy

We'll work with the MPD to prioritize the areas at greatest risk, and formulate a strategy for addressing these gaps in the most efficient way possible.

Coordinating with IT, HR, and other teams, we'll put in place any applications, platforms, or systems necessary for proper management of the various projects.

Many organizations find that they have a litany of improvement projects they want to tackle before their next designation. Failure to allocate the time and bandwidth necessary for successful completion of these projects before pursuing Magnet often leads to teams becoming overwhelmed, overburdened, and spread too thin — resulting in a lack of focus, poor execution, and disappointing outcomes.



### Stage 3:

## Gap Closure Execution & Oversight

As the organization sets out to execute on the strategies developed in stage two, we'll guide your teams to ensure projects have clear goals and objectives, progress is properly monitored, and timelines are met.

In stage three we'll work closely with the MPD and identified key stakeholders to implement and execute each project, providing ongoing coaching, as well as strategic and tactical oversight.

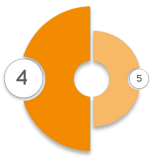
We'll provide thought leadership and coaching, and offer best practices throughout the entirety of the project — making course corrections when needed — to ensure project outcomes meet or exceed expectations.

### STAGE 2 ACTION ITEMS:

- ✓ Triaging and prioritizing gaps based on risk assessment
- ✓ Identifying key stakeholders using the **RACI** matrix: (**R**esponsible, **A**ccountable, **C**onsulted, **I**nformed)
  - stakeholders may include individuals and various councils, decision-making groups, etc.
- ✓ Creating an initial action plan and timeline for gap closure
- ✓ Implementing project management software for:
  - Document collaboration (i.e., Google Docs, Dropbox, Sharepoint, etc.)
  - Project Tracking (i.e., Smartsheets, Excel, Asana, Tallypop, etc)

### STAGE 3 ACTION ITEMS:

- ✓ Strategic and tactical project oversight
- ✓ Coaching and thought leadership
- ✓ Development of clear project goals & objectives (i.e., NSI, KPI, OKR, etc)
- ✓ Delegation of team roles & responsibilities
- ✓ Creating appropriate scopes for projects and success criteria
- ✓ Resource allocation (budget, staffing, material, IT needs, etc.)
- ✓ Timeline management



#### Stage 4:

### Magnet Project Plan & Design

We'll work directly with the MPD to design a comprehensive and detailed Magnet designation action plan and corresponding timeline.

Overseeing the Magnet documentation process involves gaining alignment across a variety of different activities: Magnet exemplar identification, writing, and editing; data collection, analysis, and presentation; and nursing demographic data collection and analysis.

In addition, particular attention will need to be given to ensuring the completion of projects initiated in stage three, as well as management of the various other Magnet-related deliverables like the Nursing Annual Report and nursing internet/intranet site refreshes.

Inability to thoughtfully allocate resources, manage bandwidth or identify bottlenecks can result in added stress, rushed deliverables, and potentially incomplete work — which may not satisfy Magnet requirements. What's worse, these pitfalls could lead to multiple requests for additional documentation or even resubmission.

#### STAGE 4 ACTION ITEMS:

- ✓ Magnet SOE alignment and development of exemplar tracker & timeline
- ✓ Timelines for writing support (workshops/intensives)
- ✓ Exemplar writing, as well as content & copying editing timeline
- ✓ Data collection timelines (RN Sat, PSat, NSI, Amb NSI, certifications, degrees, turnover, vacancy) – including RN Sat Risk Mitigation Plan & NSI benchmarking data turnaround times
- ✓ Continued oversight of gap closure items - triaged, high-priority improvement work
- ✓ Timelines for year 2 DDCT submission, as well as all required documentation for the Interim Monitoring Report (IMR)
- ✓ Various other needs required for Magnet Documentation such as: completion of Nursing Annual Report (NAR), refresh of nursing internet/intranet sites, etc.
- ✓ Supplemental documentation timeline
- ✓ ADAM submission timeline and support
- ✓ Site-visit timeline and support.



#### Stage 5:

### Magnet Project Documentation & Execution

Stage five involves oversight and execution of the Magnet project plan. This stage is where the most of the heavy lifting is done — and it requires active management.

During this stage we'll partner with the MPD, CNO, and various other stakeholders (exemplar writers, data scientists, analysts, etc.) to ensure writing, editing, and project & data timelines are on track to meet critical deadlines.

We'll help manage the entirety of the project; providing coaching, strategic guidance, and tactical support. We can also assist with writing, data analysis, and presentation. We can be as hands-on with the execution of the project as your want.



#### Stage 6:

### Magnet Site Visit Preparation

Site visit is your opportunity to show the appraisers how your organization has embraced a culture of nursing excellence — and preparation for this visit is essential to your success.

The overall purpose of the site visit is to verify, clarify, and amplify the content of the written documentation, as well as showcase your nursing practice environment.

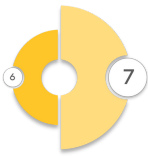
In stage six we'll coordinate with the MPD and key stakeholders to help your organization prepare for the Magnet site visit — conducting mock site visits and addressing any requests for additional documentation that may come from the Magnet Program Office.

#### STAGE 5 ACTION ITEMS:

- ✓ Triaging and prioritizing gaps based on risk assessment
- ✓ Identifying key stakeholders using the **RACI** matrix: (**R**esponsible, **A**ccountable, **C**onsulted, **I**nformed) – stakeholders may include individuals and various councils, decision-making groups, etc.
- ✓ Implementing project management software for:
  - Document collaboration (i.e., Google Docs, Dropbox, Sharepoint, etc.)
  - Project Tracking (i.e., Smartsheets, Excel, Asana, Tallypop, etc)
  - Creation of an initial action plan and timeline for gap closure.

#### STAGE 6 ACTION ITEMS:

- ✓ Strategic and tactical project oversight
- ✓ Coaching and thought leadership
- ✓ Development of clear project goals & objectives (i.e., NSI, KPI, OKR, etc)
- ✓ Delegation of team roles & responsibilities
- ✓ Creating appropriate scopes for projects and success criteria
- ✓ Resource allocation (budget, staffing, material, IT needs, etc.)
- ✓ Timeline management



Stage 7:

## Celebrating Success & Building Momentum

### IT'S TIME TO CELEBRATE!

In stage seven we'll promote the success of your Magnet Designation and help you to build on your positive momentum by developing an action plan for the next Magnet Documentation cycle.

As you look forward to your next 4-year cycle, we will work with your MPD and CNO to maintain momentum and get a head start on your next Magnet journey — including ongoing MPD development plans, coaching and mentorship support.

### STAGE 7 ACTION ITEMS:

- ✓ Developing press releases
- ✓ Organizing an on-site celebration
- ✓ Implementing a social media strategy
- ✓ Designing a plan for ongoing MPD growth, coaching, and mentorship

### What nurse leaders are saying:



***Dr. Stephens led the 4th Magnet Designation at Stanford Health Care by engaging the front-line staff and unleashing their talents. I highly recommend her.***

— Dr. Dale E. Beatty, DNP, RN, NEA-BC, Chief Nurse Executive, Stanford Health Care



***I could not have asked for more in Katie, she was just fantastic to work with. Given our timeline, we moved mountains and produced a beautiful miracle that resulted in the best Magnet document submitted in Cedars-Sinai Medical Center's history!***

— Sarah Stepien, MPH, MSN, RN, CMSRN, NPD-BC, Magnet Program Director at Cedars-Sinai



**Dr. Katie Stephens,  
DNP, RN, NEA-BC**

Co-founder & Principal at KSC

### ABOUT KATIE STEPHENS

Katie is a nurse leader, author, and coach with nearly 20 years of experience in nursing and executive leadership. She is the former Director of Nursing Excellence and Magnet® Programs at Stanford Health Care.

- President of the Association of California Nurse Leaders (ACNL) – South Bay Chapter in 2019, 2020
- Co-Chair of the ACNL state-wide Membership Committee for three years.