



# Strategies and Tools for Managing Change

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Continuous change in complex healthcare environments is a challenge for nurse leaders, but it can also be a boon. Change can leverage the introduction of innovations that improve the quality of care delivery. It all depends on how change is managed. The author describes major leadership strategies and tools to effectively manage change, particularly innovative changes that result in better outcomes for patients, staff, and the organization.

Change goes on all the time: it is impossible to stop it. In fact, continuous change can be a boon to service organizations when leaders use change as a lever to introduce innovations that strengthen the quality and the effectiveness of service delivery.<sup>1</sup> Leverage points for innovative change typically come from outside organizations.<sup>2</sup> For example, the Institute for Healthcare Improvement focuses on patient safety; the Magnet Recognition Program focuses on 14 Forces of Magnetism that have been proved to result in improved nurse, patient, and organizational outcomes.<sup>3</sup> These are but two of the myriad of change initiatives available. Nurse executives must choose wisely, to select evidence-based change initiatives that can be paced for successful diffusion throughout their organizations.

What are change lever characteristics that result in successful adoption and diffusion? A successful change initiative has visible, positive outcomes that benefit employees, such as a safer work environment.<sup>2</sup> It also compliments em-

ployees' existing values and beliefs and is associated with manageable risk. Change spreads more rapidly when it builds on the current way of doing things.<sup>2</sup> People psychologically calculate the risks and benefits of change before they act.<sup>2</sup> Change spreads faster when the initiative is not too complicated: simple is better. Complicated initiatives need to be "chunked" for manageability. Given the complexity of systems, a small change can have a significant impact. Organizations comprised many unique subcultures. People in these subcultures, such as the surgical services department and emergency services, are capable of locally adapting to change initiatives to work in their own, unique settings. "Local adaptation, which often involves simplification, is nearly a universal property of successful dissemination."<sup>2(p1971)</sup> In our everyday world, we have control only over about 15% of our immediate environment.<sup>4</sup> Asking people to think and act outside their range of local influence can lead to quick discouragement.

Executive leadership selects the change initiatives for the organization. Success is promoted by crafting change initiatives that are realistic, valued, manageable, and locally applicable to employees. Executive leadership also plans the dissemination of change in the organization. Two of the basic approaches to communicating change initiatives are event-paced and time-paced announcements.<sup>5</sup> Event-paced announcements are unpredictable and triggered by events that leaders perceive as important. Time-paced announcements differ in that information is shared and linked to future activities and projects at regularly scheduled intervals, such as monthly town hall meetings and staff meetings. These "links in time" provide smoother transitions between past, present, and future events. They provide a frame of reference and some predictability

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during continuous change. A gradual introduction of change initiatives allows staff to feel in control because individuals are more apt to recognize the need to change or to enhance skills to effectively adapt to new environmental demands.<sup>6</sup> Timed intervals permit grace periods or transition times for people to accommodate to change.

Successful change depends on viable workplace networks.<sup>1</sup> Based on Kanter's classic empowerment model, networks are sources of formal and informal powers that influence people's attitudes, behaviors, and ability to do the work.<sup>7</sup> Power, whether derived from formal explicit positions of authority or through informal positive relationships with others, provides vital access to the support, information, and resources people need to function successfully.<sup>7</sup> For nurses, access to power results in higher levels of trust in the organization and its leadership; trust translates into increased job satisfaction, organizational commitment, and the motivation and willingness to work hard.<sup>8</sup> Nurses' workplace networks are mainly peer based, but nurse leaders are also important members of nurses' networks. Peers serve as informal power sources, providing insider information and emotional support. Nurse leaders are typically formal power sources who act as vital links to the organization.<sup>9</sup>

Network disruptions are a common corollary of change processes, often triggering grief reactions<sup>10</sup> and trust in leadership and the organization.<sup>8,9</sup> Proactive planning, such as collaborative leadership-employee discussions about potential network disruptions, helps maintain trust, even during stressful times.<sup>8,11</sup> Viable networks can be a powerful leadership tool. Leach<sup>12</sup> found that regardless of infrequent social interactions or role distance, transformational executive nurse leaders had significant, positive influence over staff nurses' commitment to the organization. This finding provides evidence, perhaps, of how networks can convey and magnify leaders' influence across many organizational levels. When undergoing change, executive leaders need to consider the viability of employees' social networks.

### Leadership

Leaders provide clarity to the work that needs to get done; they ensure adequate networking opportunities and/or formal and informal access to information, resources, and support, and they reward staff for work well done. This is transactional leadership at its best. People trust leaders who consistently honor transactional agreements

with appropriate rewards.<sup>13</sup> Leader-follower transactions build trust over time. Sometimes, trust in the leader is the only anchor employees have during continuous change.<sup>14</sup>

Leaders connect employees' trust in them to trust in the organization and its vision. Transformational leaders motivate others to work together on behalf of the organization.<sup>13</sup> Individuals will go beyond expectations when they trust their leaders. Transformational leaders are known for charisma (inspirational motivation), intellectual stimulation, individualized consideration, and idealized influence (sharing values). Each of these qualities contributes to trust formation and paves the way for change.<sup>13</sup> Charismatic leaders inspire others to believe that proposed change is significant and attainable.<sup>15</sup> Intellectual stimulation cognitively motivates followers to acknowledge the evidence supporting change.<sup>3</sup> Individualized consideration invites discussions between the leader and others: people are more comfortable with change when they have had an opportunity to dialogue and share in decision making.<sup>16</sup> When people share the same values, they often experience high levels of trust in one another.<sup>14</sup>

Both leadership styles, transactional and transformational leadership, are necessary for change.<sup>13</sup> Transactional leadership establishes initial trust relationships between leaders and followers. In continuously changing environments, transactional leaders provide structure and clarity of roles, responsibilities, and expectations that help ground people.<sup>17</sup> Transformational leadership qualities forge deeper trust relationships that result in a stronger collective identity, stronger organizational commitment, and a greater willingness to trust in change.<sup>13</sup>

Effective leaders are able to reduce uncertainty and counteract blockages to change, such as apathy and low morale, by being visible and being positive.<sup>18</sup> It is no wonder that effective leaders have personality traits such as likability and sociability. They are extroverts who enjoy working with people.<sup>19</sup> They have personal power that followers value in their leaders more than formal power. Personal power is a leader's magnet.<sup>20</sup> One source of personal power is the leader's positive attitude about change. Rogers<sup>21</sup> identifies effective leaders as early adopters of innovation who view change as opportunities to learn, adapt, and improve. People work better with optimistic, adaptable leaders. Change is more effective when it is framed as a pulling strategy: pulling people or attracting them toward promising possibilities<sup>22</sup> rather than pushing or pressuring to move away from negative conditions.



## The Followers

Effective leaders create high-performing teams by sharing power, fostering interdependence through shared skills, and building a collective identity through shared goals.<sup>15,23</sup> Team-building interventions that require high levels of sharing and cooperation increase social cohesiveness and mutual trust.<sup>15</sup> An important personality trait of people who enjoy working with others and who are team players is agreeableness, which helps form social cohesion.<sup>24</sup> This social cohesiveness has to be balanced with task focus that is demonstrated by conscientiousness and emotional stability and the ability to cope with difficult tasks without getting anxious. These personality traits contribute to task focus or task cohesion.<sup>24</sup> Effective leadership is also necessary to encourage the team's esprit de corps and to focus on shared goals and objectives.<sup>13,24</sup>

What types of followers contribute to a team's change success and innovation potential? Certain types of people are catalysts for change and for innovation diffusion.<sup>2,21</sup> A bell-shaped curve can be used to categorize people according to their rates of innovation adoption. Up front are "innovators," about 2.5% of the innovation curve. These individuals are well connected to outside knowledge sources and recognize innovation opportunities, such as cutting-edge technologies and best-practice approaches. Innovators, however, are not always well connected within their organization. Their ideas need to be championed by the "early adopters" or opinion leaders, who comprise about 13.5% of the curve. These transformational leaders inspire others to follow the new idea, and they have the power to make things happen. Although they have earned the trust of others, not everybody will immediately follow them. Their immediate audience consists of the "early majority," another 34% of the curve. These followers are comfortable taking a new idea, adopting it to their local environment, and conducting small-scale pilots. Their successes pave the way for more innovation diffusion. The "late majority" followers, another 34% of the curve, watch and see what happens among the early majority. They change when successful outcomes are more certain. The last 16% of the curve consists of "traditionalists." These individuals are rooted in habits and routines: "We've always done it this way." They eventually convert, but not until the innovation has become the new status quo.<sup>2,21</sup> There needs to be a 15% to 20% critical mass of innovators, adopters, and early majority personalities to tip the scale toward innovative change.<sup>2,21</sup>

What else contributes to team innovation? A diverse team mix increases innovation potential. There is an inverted U relationship between diversity and teamwork. When diversity is low, homogeneous group members tend toward conformity or the status quo. When diversity is too great, members often have a hard time developing shared goals and objectives.<sup>25</sup> The right mix consists of people with diverse but overlapping knowledge domains and skills, such as interprofessional teams with physicians, nurses, pharmacists, social workers, and therapists. Diversity is the "spice of life," but it poses a number of leadership challenges.

Effective teamwork depends on leadership clarity, role clarity, shared goals, and frequent communication.<sup>25,26</sup> In their study of healthcare teams in a variety of settings, West and colleagues<sup>26</sup> found that low leadership clarity, such as ambiguous leadership roles and responsibilities, correlates with low levels of team support for innovation. Similarly, poor understanding of team roles and expectations results in conflict and failure, especially in healthcare where disciplines are strongly socialized to their specific roles and responsibilities. Mutual training and practice opportunities improve role clarity.<sup>27</sup> Interprofessional teamwork also can be strengthened by adopting patient-focused goals and objectives. Frequent communication is necessary to build coherent team goals and objectives that focus on positive patient outcomes. One study in the United Kingdom found that healthcare practitioners identified frequency of team meetings as the primary factor influencing successful, collaborative teamwork.<sup>27</sup>

## The Organization

People are willing to take risks and try new ideas when they trust each other and feel empowered by the organization and its leadership.<sup>10,28</sup> Gifford and colleagues<sup>29</sup> examined different hospital cultures in relation to nurses' quality of work life (including measures of organizational commitment, job involvement, empowerment, job satisfaction, and intent to turnover). Nurses' scores on quality of work life were highest in hospitals with strong human relations cultures. A human relations culture supports social cohesion and positive workplace morale through human resources development. Effective leadership communications are characterized as open and honest, with an emphasis on trust formation.<sup>29</sup> These human relations cultures can be very efficient and effective. In contrast, control-oriented cultures, with an emphasis



on productivity and cost savings, are likely to be more expensive to organizations when the personal toll on employees is considered.<sup>8,29</sup>

The uptake of innovation depends on workplace networks that encourage social interaction and knowledge sharing.<sup>2</sup> Knowledge management (KM) is a recent, but important, phenomenon that addresses how organizations leverage their knowledge or intellectual assets.<sup>30</sup> Organizations possess 3 distinct forms of knowledge: human knowledge or expertise, social knowledge or collective knowledge that develops as a result of people working together, and structured knowledge or the knowledge embedded in an organization's policies, procedures, and routines. All 3 types of knowledge are critical to organizational success.<sup>30</sup> Major KM strategies for sharing knowledge include codification and personalization.<sup>31</sup> Codification deals with structured knowledge that is relatively standardized, fills common needs, and can be used over and over again. Codified data are typically amenable to storage and retrieval through computer databases. The personalization strategy applies to human knowledge, such as clinicians' expertise, and social knowledge such as knowledge acquired through interprofessional teamwork. The personalization strategy depends on viable social networks for conveying these types of knowledge.<sup>31</sup> Effective organizations use both KM strategies, but they use an 80/20 approach that heavily favors one type of strategy, depending on the types of knowledge most significant to the organization's goals and objectives.<sup>31</sup> Successful organizations have lost their competitive advantage by investing too much in the wrong type of KM strategy.<sup>31</sup> Most health-care organizations require viable social networks to effectively manage/share expertise and collective wisdom. Berwick<sup>2</sup> describes the importance of "spannable social distance," where each person hears the news from someone socially familiar and credible to them. Networking opportunities among employees require organizational investment, such as meeting spaces and time away from work responsibilities to generate discussion.<sup>2</sup>

What are the outward signs of an organizational culture that supports social networking? Vertical interactions between different lines of authority are known for leaders' approachability and willingness to discuss all kinds of topics, even sensitive ones, openly and honestly.<sup>30</sup> Horizontal interactions among individuals at the same organizational level support seeking out existing expertise versus "reinventing the wheel." High levels of interaction and collaborative problem solving are organizational norms. This is a high-trust organiza-

tional culture: where trust exists among the organization, its leadership, and their followers.<sup>30</sup>

### *Change Management Tools*

There are many change models available to organizational leaders. Regardless of the model selected, the following tools facilitate the process.

#### *The Vision/Mission Statement*

Shared values are the primary vehicle through which people experience the highest form of trust in one another and their leader.<sup>16</sup> A clear vision and mission can unify the values of external and internal stakeholders. In a study of 418 project teams, a clearly stated vision and mission was the only factor that predicted collaborative teamwork and success.<sup>25</sup>

Strategic planning requires executive leaders in an organization to examine organizational strategy in the context of past, present, and future performance indicators. "Where has the organization been, where is it now, where does it want to be?" The vision and mission drive executive-level strategy, ideally serving as a template for department- and unit-level philosophies and providing guidance for project planning.<sup>32</sup> Internal stakeholders are more likely to identify with the vision and mission and relate it to their local work environment when they participate in creating department or unit philosophies that compliment the organizational vision and mission.<sup>32</sup> The change process should begin with a vision/mission analysis (Table 1), which drives organizational strategy. Project plan descriptions, goals, and objectives are ways to accomplish the organizational strategy and bring the organizational vision and mission statements to life.<sup>32</sup>

The vision and mission can also be a springboard for personal values examination and a means to build a stronger organizational culture with shared values and a collective identity. A technique borrowed from Yukl<sup>15</sup> is to ask a group of stakeholders to develop personal vision and mission statements. Lead questions might be: "What do you believe are ideal qualities of this organization?" "What do you think the future goals for this organization should be?" Small group discussion should focus on identifying shared values and ensuring a match with the organization's vision and mission.<sup>15</sup> This type of analysis process was effectively used to reshape a negative nursing practice environment<sup>33</sup> and a negative emergency department culture.<sup>34</sup>



Table 1. Vision/Mission Analysis

Step	Key Components
1	What is the organization's basic purpose? This is what we typically mean by a vision statement. It should be embodied in 1 to 2 succinct, "snappy" sentences. A logo or visual representation is also helpful.
2	What is unique or distinct about the organization? This is the "selling point" for stakeholders, especially external stakeholders.
3	What is the future orientation? One to 2 sentences should summarize future strategy or organizational aspirations.
4	Who are the key stakeholders? Some statements include examples of key internal and external stakeholders. This can be a powerful way to get "buy-in" from stakeholder groups—include them in the vision/mission statement.
5	What are the key words or phrases? Do these words represent the organizational culture's values, beliefs, and practices? If they are enduring words, they should serve as a "thread" in departmental and unit philosophy statements, and in background descriptions, goals, and objectives of project plans.

### Team Brainstorming and Preplanning Exercises

Before a team starts planning, time should be devoted to getting to know one another (social cohesion). Teams can begin to build trust through personal history exercises and profiling tools, such as the Myers-Briggs Type Indicator. It is often helpful to have a team facilitator or a licensed consultant help with team-building sessions.<sup>35</sup> Brainstorming exercises can be used to focus team members on the task. An Is/Is Not exercise promotes team discussion around what the project

is and what it is not.<sup>36</sup> Another brainstorming exercise, Critical Success Factors, is a precursor to setting up a detailed project grid. Team members identify "must do's," "must have's," "must when's," "must who's," and "must results."<sup>36</sup>

### Stakeholder Analysis

Who are those key people who will be affected by your project? Based on Lewin's force field analysis, there are drivers and restraints.<sup>32</sup> The team needs to scope out the commitment level of each key stakeholder. If stakeholders play an important role and their commitment is low, the team needs to develop influence strategies to win them over. Influence strategies include sound evidence to support the change. Doing this homework beforehand is critical. There has to be a positive valence for stakeholder commitment before undertaking change projects.<sup>36</sup> (Table 2). It is also useful to think of drivers and restraints with respect to the environment or climate (internal and external). SWOT analyses are great tools for assessing the "bigger picture." The acronym stands for S, internal strengths; W, internal weaknesses; O, external opportunities; and T, external threats. A modified SWOT analysis clusters all the positive internal/external factors together and all the negative internal/external factors together. These are analyzed with respect to short-term and long-term planning: a present and future focus.<sup>36</sup>

### Teamwork Quality

Effective teamwork is critical to the success of change projects. Does your team have the qualities of a high-performing team? These qualities and questions can be adapted into a team checklist.<sup>37</sup> (Table 3). Another resource is Lencioni's team model and scoring tool.<sup>35</sup> This model looks at

Table 2. Stakeholder Analysis<sup>a</sup>

Stakeholder	Commitment Level (High, Medium, Low)	Stakeholder Roles	Drivers	Restraints	Influence Strategy
Key internal and external stakeholders (individuals or groups). When getting started, focus on your top 10.	How committed are they?	Why do you need them?	What's in it for them?	What risks are they taking?  What are the drawbacks to their participation?	Be prepared with evidence and a rationale for your project.

<sup>a</sup>Data adapted with permission from Change Management Tools.<sup>36</sup>



**Table 3. High-Performing Teams Checklist<sup>a</sup>**

Quality or Characteristic	Qualifying Questions
Communications	<ol style="list-style-type: none"> <li>1. Is there sufficient vertical (formal) team communication?</li> <li>2. Is there sufficient horizontal (informal) team communication?</li> </ol>
Coordination and mutual support	<ol style="list-style-type: none"> <li>1. Are individual efforts assimilated into team efforts?</li> <li>2. Do team members help and support each other to achieve team goals?</li> </ol>
Contributions	<ol style="list-style-type: none"> <li>1. Is each team member maximizing his or her contributions?</li> <li>2. Is the team taking full advantage of each member's expertise?</li> <li>3. Is the team acknowledging the contributions of its members in an equitable or balanced fashion?</li> </ol>
Cohesion	<ol style="list-style-type: none"> <li>1. Are there team spirit and a collective identity?</li> <li>2. Are team members focused and motivated to achieve the team goals?</li> </ol>

<sup>a</sup>Data adapted from Hoegel and Gemuenden.<sup>37</sup>

team dysfunction, although he provides excellent recommendations for overcoming each of 5 typical team dysfunctions characterized by absence of trust, fear of conflict, lack of commitment, avoidance of accountability, and inattention to results.

## The Project

### The Project Grid

A visible plan such as a project grid is another tool to promote project success. One of the dysfunctions mentioned by Lencioni is lack of accountability.<sup>35</sup> A visible display of the project plan with designated accountability for each step enhances accountability. Some common visual representations of project plans include grids, timelines, and Gantt charts.<sup>32,36</sup> A visible project plan serves not only to plan, but also to monitor progress. It also serves as a communication tool.

The project grid should have 1 step per objective. Each objective should have 1 action or verb. Using the SMART acronym, each objective should be specific, measurable, and achievable and have adequate resources and a time and date for completion. The grid should also include an evaluation component with specific outcomes that can be monitored to ensure that each step has been successfully completed.<sup>36</sup> Designated accountabil-

ity for steps of the project is important. A collective identity can be built by assigning different team members as leaders and evaluators for different steps or phases of a project. Project grids should be revisited by the project team on a regular basis because of the shifts that occur in continuously changing, complex environments.

### Progress Reports

A timeline and content for regular progress reports should be built into the project grid. These reports are another team accountability mechanism and serve as an explicit, formal organizational mechanism for communicating throughout the organization.<sup>15,32</sup> Knowledge management codification strategies such as Web site postings and electronic updates work well for communicating this type of knowledge. When there is personal or tacit knowledge that needs to be conveyed about the project, however, town hall meetings or staff meetings are better options.<sup>30</sup> Face-to-face communications are especially important for key stakeholders.<sup>16</sup>

### The Social Network Questionnaire

People rarely have opportunities to discuss how their social support networks might be affected by change. The Social Network Questionnaire (SNQ) can lead to discussions among employees about their support networks.<sup>9</sup> Antonucci originally devised this tool for social network analysis, but the questionnaire can provide an excellent self-reflection experience and initiate valuable leader-employee discussions before change initiatives.<sup>9</sup> The SNQ consists of 3 parts: (a) a series of nested rings that represent a person's social support network; (b) a form to record people in their network: who they are and what roles they fulfill, such as peer, subordinate, supervisor; and (c) a form to record what types of supports their network members provide for them. These supports, such as guidance, reassurance, feedback, and physical assistance, help people function effectively in the workplace. Every person is unique with respect to his or her network members and the types of supports needed to function effectively in the work environment. The SNQ is completed by individuals, but it can be examined at an individual or group level to determine whether there are network gaps affecting the "health" of the work environment. When individuals are professionally dissatisfied, is it because of social support gaps? If a work environment has high rates of absenteeism and turnover, perhaps it is time to look at how people support (or do not support) each other. If many members of the group have network gaps, it



may be a reflection of the culture. In the face of a redesign, such as a merger or downsizing, what will happen to people's networks? The SNQ can help people imagine the consequences of change and proactively plan, as individuals or as a group, to maintain viable social networks. Although people will still experience loss and grief from losing connections they have made, the process is emotionally validating to them and indicates leadership's concern for their well-being.<sup>9</sup>

### Transition Monitoring

In complex organizations, with lots of projects under way, it is easy for projects and people to drift. To prevent this drift, transition monitoring teams may be appointed. These teams can alert the leader to unforeseen problems.<sup>38</sup> Although this may seem like an espionage mission, individuals on this team publicly solicit information from organizational members. Ideally, this process is open and visible to ensure that everybody has a

**Table 4. Change Strategies and Tools**

Effective Change Process	Outcomes
Leverage points: realistic, valued, manageable, locally applicable	Trust formation
Time-paced information	Innovative change
Viable workplace networks	
Effective Leadership	Outcomes
Transactional style→trust formation	Trust formation
Transformational style→extra effort, motivation	Innovative change
Early adopters: optimistic, adaptable, opportunistic	
Effective Teams	Outcomes
Social cohesion: agreeableness	Trust formation
Task cohesion: conscientiousness, emotional stability	Innovative change
Critical mass: innovators, early adopters (leaders), early majority	
Diversity	
Leadership clarity	
Role clarity	
Shared goals	
Frequent communication	
Effective Organizations	Outcomes
Empowerment: adequate information, resources, supports	Trust formation
Human relations culture	Innovative change
KM: 80/20 (typically personalization/codification)	
Vertical networking: leadership approachability	
Horizontal networking: using existing expertise, high levels of interaction, collaborative problem solving	
Effective Change Management Tools	Outcomes
The vision/mission	Trust formation
Vision/mission analysis, personal values examination	Innovative change
Preplanning, team building	
Is/Is Not, Critical Success Factors, stakeholder analysis, SWOT analysis	
Psychological preparation	
The SNQ	
Teamwork	
Teamwork quality questions, Lencioni's model	
The project	
Project grid, project reports	
Transitions	
Transition monitoring team, repeat SWOT analysis	
Closure	
Celebration!	



voice or a mechanism for sharing concerns with the project team and leader.

### A Final SWOT Analysis

A project may appear successfully completed and yet fail. Before project closure, the team should do another SWOT analysis with respect to present and future outcomes. We often get complacent when the project seems on course, and the majority of people have accepted it as status quo. A final analysis reassures everybody of the status of the project and its place in the organizational culture.<sup>39</sup>

### Celebrations

It is important to signal project completion with a celebration.<sup>39</sup> Teams that expect public acknowledgment of their efforts will also work harder to achieve results.<sup>35</sup> For leaders, a public celebration earns trust in the organization and in them. It sends a signal that says: this organization supports

innovation. These public declarations are characteristic of high trust cultures.<sup>30</sup>

### Conclusion

Innovative change, change that introduces new and better ways of doing things, can be effectively managed with proven strategies and tools. Table 4 summarizes the key components to innovative change, including the leadership styles, the team members, the organizational culture, and change process approaches that allow nurse executives to successfully maneuver within complex, continuously changing healthcare environments. Perhaps the most critical ingredient underlying these change strategies and tools is the formation of trust. Trust in the organization and its leadership results in nurses' increased satisfaction, commitment, and motivation to engage in change.

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