



Team Lead Toolkit

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I. Welcome

Thank you for choosing to dedicate your time and passion to the work of the Pennsylvania Action Coalition (PA-AC). Like you, we care deeply about the health of Pennsylvanians, and we believe that nursing plays a key role in transforming health care throughout the Commonwealth. As a diverse group of health care stakeholders, we rely on strategic partnerships and volunteer commitments to implement the recommendations of the Institute of Medicine's *Future of Nursing: Leading Change, Advancing Health*. In 2015, the National Academy of Medicine, formerly the Institute of Medicine, evaluated the progress made through the Campaign for Action in the 5 years since the report was first published. In 2016, the PA-AC is recharged and its regions revived to advance a Culture of Health in Pennsylvania through nursing.

This toolkit serves as a roadmap and resource for "Regional Team" activities. We hope that it will become your go-to resource for everything you need in order to work towards the vision of a healthier Pennsylvania through high-quality, accessible, and safe nursing.

We want to be a resource for you, and we cannot wait to hear about the work you are doing to implement the *Future of Nursing* recommendations in your region. We encourage you to share the work you and your organizations are doing to advance the recommendations. If you have any issues or questions, please email PA-AC at paaction@ncc.us. Additionally, you can always stay up-to-date by following us on Twitter (@PaAction), liking us on Facebook (facebook.com/paactioncoalition), and visiting www.paactioncoalition.org.

As always, thank you for all the work you do to advance a healthy Pennsylvania through nursing.

Sincerely,



Paula Milone-Nuzzo, RN, PhD, FHHIC, FAAN
PA-AC Advisory Board Chair



Sarah Hexem, Esq.
PA-AC Director

II. Background

a. *Future of Nursing Report*

The 2010 [*Future of Nursing: Leading Change, Advancing Health*](#) identified the nursing profession as central to reshaping the U.S. health care system so that all Americans have access to high-quality and cost-effective care.

Key Messages

- Nurses should practice to the full extent of their education and training.
- Nurses should achieve higher levels of education and training through an improved education system that promotes seamless academic progression.
- Nurses should be full partners with physicians and other health care professionals in redesigning health care in the United States.
- Effective workforce planning and policy-making require better data collection and an improved information infrastructure.

Five main areas (or “pillars”) of focus:

- Advance education transformation
 - We need to prepare our nursing workforce for the future by strengthening education and training.
- Remove barriers to practice and care
 - We need to expand access to care by maximizing the use of nurses and modernizing outdated policies that prevent nurses from practicing to the full extent of their education and training.
- Leverage nursing leadership
 - We need to prepare the next generation of nurses to meet the health care needs of people, their families, and the communities where they live and to position nurses to lead system change.
- Promote diversity
 - We need to promote diversity in the nursing workforce, as well as prepare the nursing profession to provide culturally competent care in a variety of settings to an aging and ethnically diverse population with chronic illnesses.
- Foster interprofessional collaboration
 - We need to promote a team-based approach to education and practice to improve the quality and coordination of health care.
 - We need accurate data to predict workforce needs and competencies, assess quality, and determine what’s working and what’s not.

Data informs all we do, so we are working on data collection across all five focus areas/pillars.

[Future of Nursing Report Recommendations \(2010\):](#)

- Recommendation 1: Remove scope-of-practice barriers.
- Recommendation 2: Expand opportunities for nurses to lead collaborative improvement efforts.
- Recommendation 3: Implement nurse residency programs.
- Recommendation 4: Increase the proportion of nurses with a baccalaureate degree from 50 to 80 percent by 2020.
- Recommendation 5: Double the number of nurses with a doctorate by 2020.
- Recommendation 6: Ensure that nurses engage in lifelong learning.
- Recommendation 7: Prepare and enable nurses to lead change to advance health.
- Recommendation 8: Build an infrastructure for the collection and analysis of interprofessional health care workforce data.

[Future of Nursing Report Updated Recommendations \(2015\):](#)

- Recommendation 1: Build common ground around scope of practice and other issues in policy and practice.
- Recommendation 2: Continue pathways toward increasing the percentage of nurses with a baccalaureate degree.
- Recommendation 3: Create and fund transition-to-practice residency programs.
- Recommendation 4: Promote nurses' pursuit of doctoral degrees.
- Recommendation 5: Promote nurses' interprofessional and lifelong learning.
- Recommendation 6: Make diversity in the nursing workforce a priority.
- Recommendation 7: Expand efforts and opportunities for interprofessional collaboration and leadership development for nurses.
- Recommendation 8: Promote the involvement of nurses in the redesign of care delivery and payment systems.
- Recommendation 9: Communicate with a wider and more diverse audience to gain broad support for campaign objectives.
- Recommendation 10: Improve workforce data collection.

b. Campaign for Action

The Future of Nursing: Campaign for Action (hereinafter "Campaign") is a national initiative to guide implementation of the recommendations in the *Future of Nursing* report. The Campaign is coordinated through the Center to Champion Nursing in America (CCNA), an initiative of AARP, the AARP Foundation, and the Robert Wood Johnson Foundation (RWJF). The Campaign includes 51 Action Coalitions (from every state and Washington, D.C.) and a wide range of health care providers, consumer advocates, policy makers, and leaders from the business, academic, and philanthropic arenas.

Vision: A health care system where all Americans have access to high-quality care, with nurses contributing to the full extent of their capabilities.

c. RWJF State Implementation Plan (SIP) Grants

Through the Robert Wood Johnson Foundation, the Campaign helps financially support the work of the Action Coalitions. The RWJF State Implementation Plan (SIP) program is a \$7.65 million initiative that helps support 33 Action Coalitions. Through the SIP program, Action Coalitions identify one or two “priority” recommendations and create a two year Action Plan to implement those priorities. Action Coalition activities are not limited to the work identified in the SIP grant, and many Action Coalitions have teams working on a variety of recommendations.

The PA Action Coalition is one of 18 states that received a second two-year grant in February 2015. Pennsylvania’s SIP plan identifies the following two recommendations for its SIP action plan:

1. **Recommendation 4:** Increase the proportion of nurses with a baccalaureate degree
2. **Recommendation 8:** Build an infrastructure for the collection and analysis of interprofessional health care workforce data.

Within both recommendations, the PA Action Coalition SIP work plan highlights the importance of diversity initiatives and leadership development.

d. About the Pennsylvania Action Coalition

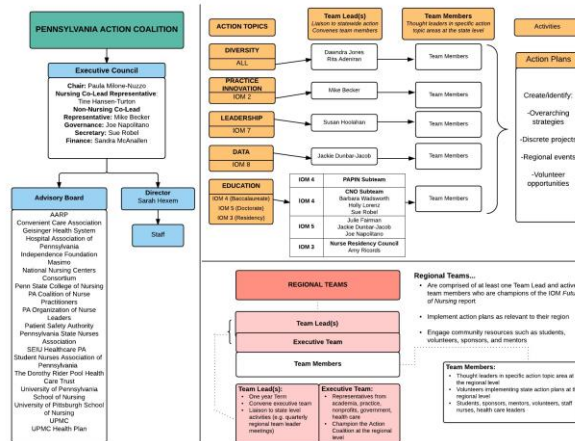
The PA-AC is comprised of a diverse group of local, regional, and state-level stakeholders who aim to create long-term, sustainable change in the fields of nursing education and practice.

Vision: A healthy Pennsylvania through high quality, accessible, and safe nursing.

Mission: To implement the IOM Future of Nursing Recommendations through strategic partnerships.

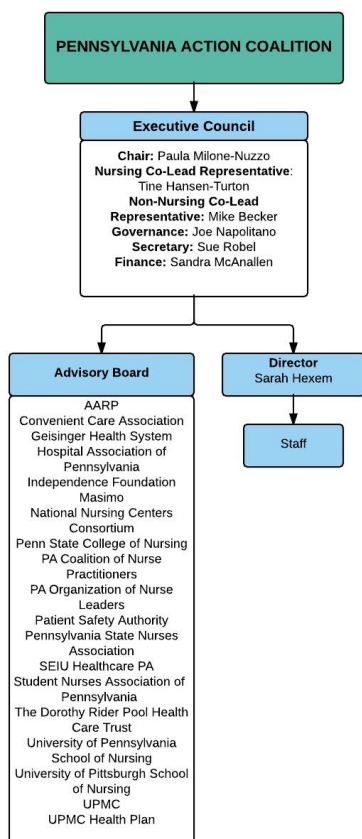
The PA-AC is comprised of three main bodies of stakeholders;

1. **Central infrastructure-** Includes Executive Council, Advisory Board, and Director/Staff
2. **Action Teams-** Statewide teams focused on developing specific strategies to advance the *Future of Nursing* recommendations.
3. **Regional Teams-** Regional teams implementing Action Plans by building strategic partnerships at the regional level.



III. Organizational Structure

a. Advisory Board, Executive Committee, and Director



• The **Advisory Board** is comprised of a diverse group of local, regional, and state level stakeholders who aim to create long-term, sustainable change in the fields of nursing education, practice, research, diversity, inter-professional collaboration, and leadership.

Organizations represented on the Advisory Board include: AARP; Convenient Care Association; Hospital Association of PA; Independence Foundation; Masimo; National Nursing Centers Consortium; Penn State College of Nursing; PA Coalition of Nurse Practitioners; PA Organization of Nurse Leaders; PA Patient Safety Authority; PA State Nurses Association; SEIU Healthcare PA; The Dorothy Rider Pool Health Care Trust; UPenn School of Nursing; UPitt School of Nursing; UPMC; UPMC Health Plan.

- **Chair:** Paula Milone-Nuzzo
- **Nursing Co-Lead:** Tine Hansen-Turton
- **Non-Nursing Co-Lead:** Michael Becker
- **Governance:** Joe Napolitano
- **Secretary:** Sue Robel
- **Finance:** Sandra McAnallen

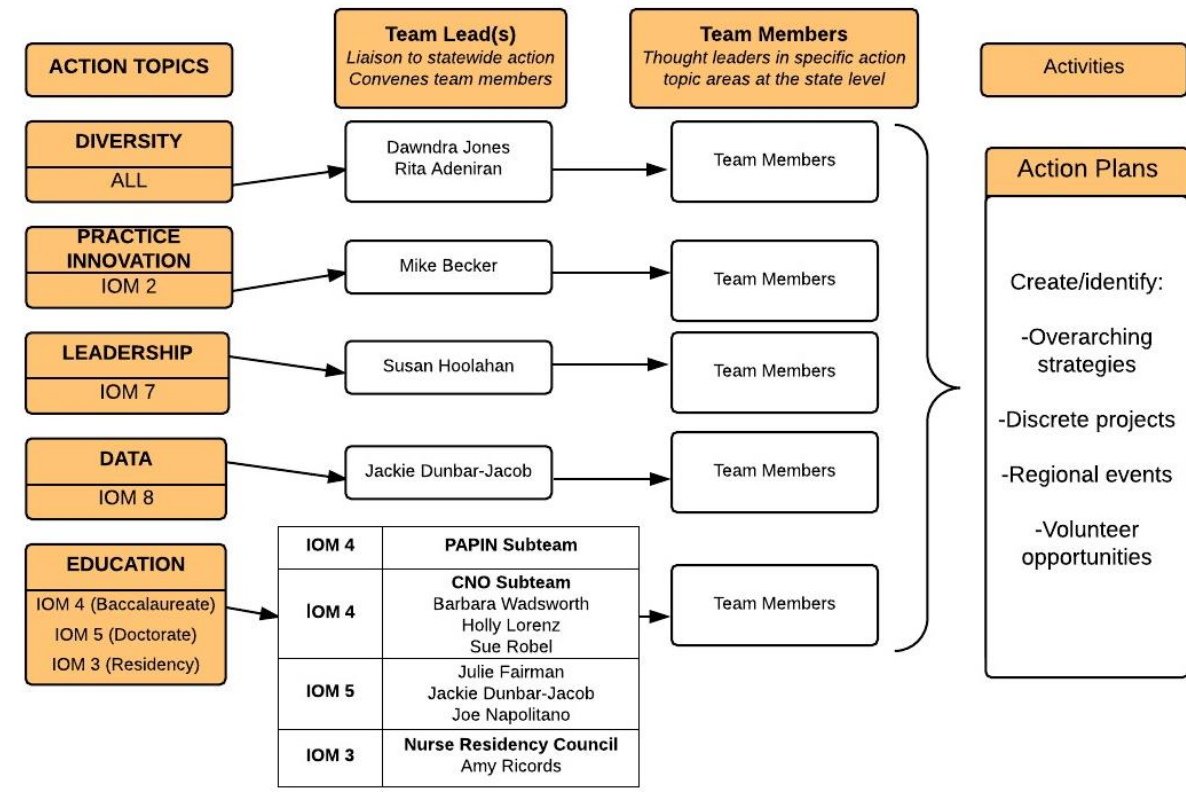
• The **Executive Committee** of the Advisory Board develops the strategic and operational policies for the PA-AC, including the governing principles, strategic plan, annual budget, and organizational structure, which is then approved by the PA-AC advisory board.

• The **Director** of the PA-AC assumes overall responsibility for coordination and oversight of the PA-AC’s activities. This includes, but is not limited to, engaging and leading a broad range of stakeholders toward common goals, ensuring an effective coalition infrastructure, securing resources, serving as a contact communications steward, guaranteeing proper compliance with lobbying intervention and other laws, and fulfilling any reporting requirements.

Advisory Board Roles and Responsibilities:

- Provide general direction and oversight for the planning, implementation and assessment of the ongoing work and effectiveness of the PA-AC.
- Act as a *Future of Nursing* champion within their organization and throughout the state of PA.
- Assume a key leadership role on at least one action or regional team.
- Serve as the approval body for operational policies developed by the Executive Committee including governing principles, annual operating budgets, and strategic plan.
- Evaluate outcomes of the PA-AC efforts on an annual basis.
- Foster communication and collaboration among all PA-AC members.
- Commit to the sustainability of the PA-AC by pledging to generate a financial contribution that may be fulfilled through in-kind support if approved by the Executive Committee.

b. Action Teams



Roles and Responsibilities:

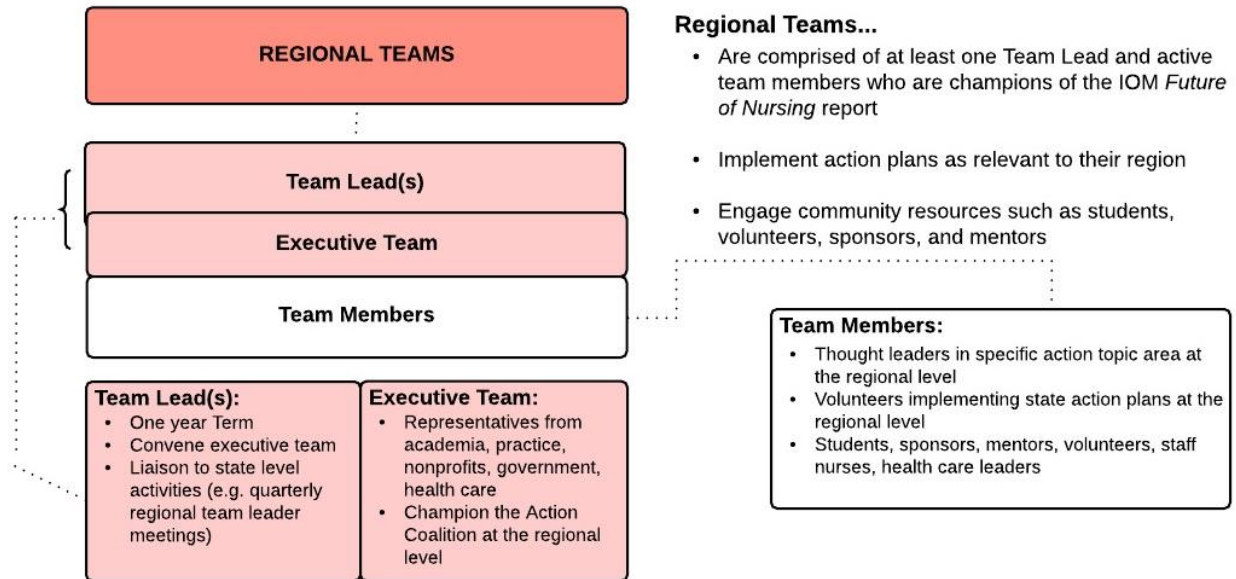
• Action Team Lead(s)

- Function as the liaison between Action Team and the PA-AC Director, Executive Committee, and Advisory Board.
- Work with the PA-AC Advisory Board and Regional Teams to welcome new PA-AC members that have an interest in joining their Action Team.
- Participate in quarterly meetings with Action Team Leads and the PA-AC Director.

• Action Team Members

- Provide statewide leadership on specific recommendations of the *Future of Nursing* report.
- Collaborate with thought leaders from diverse settings to implement specific recommendations.
- Design state Action Plans with concrete strategies to implement recommendations, including discrete projects, suggested regional activities, and volunteer opportunities.

c. Regional Teams



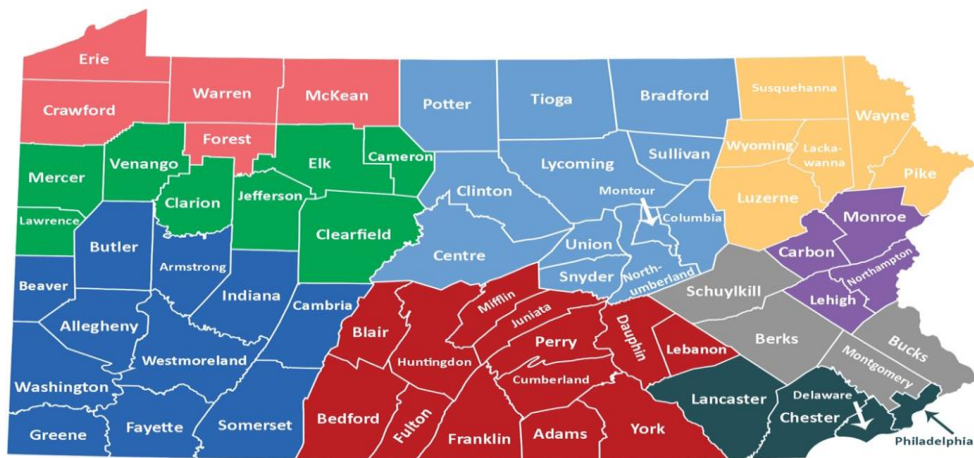
- **Regional Team Lead(s)**
 - Team lead(s) function as the liaison between the Regional Team and the PA-AC Director, Executive Committee, and Advisory Board.
 - Regional Team Leads serve one year terms and participate in quarterly meetings with Action Team Leads and the PA-AC Director.
- **Regional Executive Team**
 - Identify, recruit, and support PA-AC members in their region in accordance with the PA-AC mission, values, and strategic plan.
 - Includes representatives from academia, practice, nonprofits, government, health care organizations, public health, and more.
- **Regional Team Members**

Members can serve a range of functions, including:

 - engaging in Regional Team activities and taking on leadership roles when needed supporting one or more of the *Future of Nursing* recommendations and pledging to work toward achieving that goal and to keeping the PA-AC informed about their progress
 - supporting the PA-AC through financial contributions, support, and in-kind services
 - contributing to PA-AC efforts in various ways as students, volunteers, sponsors, or mentors

Regional Teams:

- Northwest 1: Erie, Crawford, Warren, McKean, Forest
- Northwest 2: Mercer, Lawrence, Venango, Clarion, Jefferson, Elk, Cameron, Clearfield
- Southwest: Beaver, Butler, Armstrong, Indiana, Cambria, Somerset, Fayette, Westmoreland, Allegheny, Washington, Greene
- South Central: Blair, Huntingdon, Mifflin, Juniata, Perry, Cumberland, Dauphin, Lebanon, York, Adams, Franklin, Fulton, Bedford
- North Central: Potter, Tioga, Bradford, Sullivan, Columbia, Northumberland, Montour, Union, Snyder, Centre, Clinton, Lycoming
- Northeast 1: Susquehanna, Wayne, Pike, Lackawanna, Luzerne
- Northeast 2: Monroe, Carbon, Lehigh, Northampton
- Southeast 1: Lancaster, Chester, Delaware, Philadelphia
- Southeast 2: Schuylkill, Berks, Montgomery, Bucks



IV. Resources

a. Google Drive

- **Google Drive:** Relevant documents referenced in this toolkit can be found in the [PA Action Coalition Google Drive folder](#). The information contained here is updated frequently, and you are encouraged to check the folder often.

b. Funding

- **PA-AC Action Fund:** The Advisory Board dedicates funds to support the work of Regional Teams and Action Teams. These small stipends can be used for guest speaker fees and accommodations, food, facility rentals, or other activities deemed appropriate by the Advisory Board. The Action Fund request form is available in the [Google Drive](#).

c. Technology

- **Web-Based Meeting Platforms:** We encourage you to make any/all meetings remotely accessible. When possible, please use web-based meeting platforms that are available to you through your organization or other team members' organizations. If you do not have access to the technology you desire (e.g. a conference line) or need assistance with scheduling meetings, please email paaction@nccc.us.

d. Messaging

- **Social Media:** The PA Action Coalition is active on social media through Facebook, Twitter, and our bi-monthly e-newsletter. You are encouraged to follow the PA Action Coalition on these platforms and share the content with your networks.
 - Facebook- <https://www.facebook.com/PAActionCoalition/>
 - Twitter- [@PaAction](#)
- **Campaign PowerPoint Presentation:** The [CFA Overview PowerPoint Presentation and Template](#) (long and short versions) can help you frame your Regional Team within the context of the national Campaign. We encourage you to use the standard PowerPoint in your Campaign-related presentations to communicate about your team's work to a variety of audiences.
- **PA Action Coalition 2016 Slide Deck:** *Coming soon.*
- **Marketing and Communication Materials:** The Campaign for Action has developed many marketing materials for use at the regional level and provides a [library](#) of essential resources for several of the key pillar areas and learning collaboratives. The PA-AC also develops marketing materials that are available on the [Google Drive](#). The PA-AC can also work with you to develop specific communication pieces for special events.

Additionally, you can use the following resources to help you make your case in your region. Use these documents to help you prepare talking points, speeches, news releases, handouts for meetings and events, and other written content for engaging formal or informal audiences. The messages should give your voice greater impact and help extend your reach.

- Campaign for Action [Campaign Overview](#): The *Campaign Overview* is a two-page document that provides background on the Campaign and describes our work and progress toward our goals. This document is updated often to reflect the latest progress and accomplishments.
- Robert Wood Johnson Foundation [Research Briefs](#): The RWJF launched a program to generate, disseminate, and translate research that is designed to help the public understand how nurses contribute to and can improve patient care quality.
- Campaign for Action's [CFA Action Coalitions: A Message Primer](#): The *Primer* is intended to help you communicate about the Campaign for Action with the goal of building greater engagement among constituents.

e. Identifying Stakeholders

- **Who should be involved?** The National Academy of Medicine praised the state Action Coalitions for galvanizing the nursing community over the past 5 years. In the next 5 years, the Campaign for Action plans to cast a broader net and engage stakeholders beyond nursing to advance a Culture of Health in which nurses play a key role in improving health.
- **Where to start?** Watch the Campaign for Action's [webinar](#) on volunteer engagement and coalition management.
- **How to reach out?** The [Communications section](#) of the Campaign for Action website provides a robust library of tips and tools on reaching out to prospective stakeholders.

f. Fundraising Toolkit

- **Campaign for Action *Fundraising Guide for Action Coalitions***: The [Fundraising Guide For Action Coalitions](#) has been developed to help demystify fundraising and provide basic guidance to help you secure the financial resources necessary for your team to succeed.

g. Event Planning Toolkit

- **Campaign for Action *Hosting an Action Coalition Event***: Hosting an event can be a great opportunity for your Regional Team to engage local communities, organizations, funders, and state leaders, as well as to increase support to advance the work of the Campaign for Action. The [Hosting an Action Coalition Event](#) document will guide you through the process of planning an event.

h. Lobbying

- **Campaign for Action *Considerations for Action Coalition Lobbying***: The [Considerations for Action Coalition Lobbying](#) document provides five key points to consider on lobbying as you strategically plan your activities.

i. Polls and Surveys

- **RWJF Guidelines for Funding and Releasing Polls and Surveys**: Polls and surveys must provide reliable and objective information that meets the highest standards for scientific integrity and adheres to RWJF's policies and principles. RWJF-funded polls and surveys must conform to the Code of Professional Ethics and Practices of the American Association for Public Opinion Research (AAPOR). The [RWJF Guidelines for Funding and Releasing Polls and Surveys](#) document explains these guidelines.

j. Brand

- **Campaign for Action *Branding Guidelines for Action Coalitions***: The Campaign for Action logo and branding materials are available online. Please note that approval is required prior to use of the Campaign for Action logo; make sure to read the [Branding Guidelines for Action Coalitions](#) document carefully before using the logo, colors, or any other form of Campaign branding on your materials.
- The PA-AC logo is available on the [Google Drive](#). If you are interested in using the PA-AC logo or colors, please email paaction@ncc.us.