INTENTIONAL SHARING OF KNOWLEDGE & WISDOM

KATHY MALLOCH, PHD, MBA, RN, FAAN
TIM PORTER-O’GRADY, DM, EDD, SCD(H), APRN, FAAN, FACCWS

CHAPTER OBJECTIVES

Describe the compelling drivers to formalize handing off of intellectual property.

Define the basic elements of mentorship and succession.

Clarify the elements, characteristics, and dynamics of the mentoring relationship as a part of the process of leadership succession.

Develop insights for determining the personal commitment and role in transitioning, mentoring, and succession.
Every year, Tim and I schedule time for a retreat to plan what we are going to focus on in the next year. We select a special place where we can both think and play and do something special. At our latest retreat at the Ojai Valley Inn & Spa in California, we found ourselves wondering how many more revisions of our work we could do—and how much longer our ideas and strategies would be relevant for healthcare organizations. And then came the even tougher question: What would happen to our textbooks? Would *Quantum Leadership* just sail into the sunset? We humbly wanted the information that would be meaningful to future generations not to be lost; we did not want future generations to rediscover what we had already identified and shared. These questions got us to think about how to hand off our successful ideas to younger colleagues and selectively discard that which is no longer relevant. From that conversation, we began to strategize and learn about how to hand off knowledge and wisdom to younger generations, and this book is a result of those ideas.

We realized from our consulting practices that highly successful professionals are often reluctant to consider retirement, and many people avoid the thought of moving away from active engagement with colleagues in sharing knowledge and wisdom. It is even more challenging to figure out how to hand off or give one’s intellectual property to another colleague. As an unprecedented number of baby boomers move closer to retirement, there is much to share with succeeding generations. There is also some content or intellectual property that might not be applicable in future generations. We believe a formalized process for sharing and designating intellectual property and products would be helpful to not only our baby boomer colleagues but also to other generations of colleagues.
THE NEED FOR GENERATIONAL SHARING

Our professional consulting focus has been on the importance of leadership and in helping others to learn as much as possible about leadership—to embrace new ideas to become the most successful leaders possible. Our belief has always been that everyone is a leader, regardless of whether they have a formal leadership title. Whenever two individuals are together, one person begins the dialogue or movement in the simplest way, and leadership is evident. Each one of us has some special knowledge and expertise that future generations should or might want. Creating a culture as well as validating the science that assists others in handing off and nourishing our colleagues with our wisdom is important to both of us. Cultivating a culture of giving to others with minimal expectations of receiving something in return will allow future generations to grow and move on with what is vital to them. Our focus has shifted from figuring out what to give and how to instruct them to “love our stuff” to identifying interested colleagues and turning our work over to them to sort out and retain what is deemed valuable. It is also time for us to get out of the way of future leaders and shift from driving the boat to creating a safe space for others learning how to manage the boat’s journey!

Soon after our retreat, I was invited to keynote a leadership summit group; my focus was on this topic of generational sharing. Participants at this meeting included successful professionals from three generations, including chief executive officers, nurse executives, consultants, real estate executives, and physicians. As part of the keynote, I presented the plan Tim and I developed to hand off two of our books (see the feature that follows) and the discussion began to flow. Participants were highly interested in learning more and becoming involved in advancing the science of both giving and receiving intellectual property and the wisdom of ages.
Reflecting on these ideas, we created a book proposal with the interested retreat participants. We now had a team of wisdom experts to join us on this journey and, most importantly, the authors represented three generations of interested professionals. We realized quickly that the importance of sharing generational wisdom was significant and that there

**HANDING OFF OUR PUBLICATIONS**

After many years of writing books and revising those books, Tim and I wondered what would happen to our book content when we were really finished writing. So, after some thought, we decided to be proactive and formally pass on the writings.

Over the course of our careers we had had many excellent students and colleagues; we selected two who we thought embraced our philosophy about innovation and leadership and had a track record for getting things done. We asked Dr. Dan Weberg and Dr. Sandra Davidson if they would be interested in taking on the work of combining our evidence-based practice (EBP) books with our *Innovation Leadership* book to make one “Innovation—Evidence Dynamic” book. They were extremely excited and ready to set up and pursue a plan to make this happen. Our next step was to contact the publisher and present our idea.

The publisher developed a contract, and Tim and I reviewed and approved it. Then it went to Dan and Sandra as the new lead authors. For this new book, Dan and Sandra would be the lead authors while Tim and I followed them. In the next edition, only Dan and Sandra will be listed as authors, and Tim and I will be contributors as the new authors deem necessary. Dan and Sandra skilfully took the chapter content from both books, rearranged it, added new chapters, and deleted those they thought were less relevant in today’s healthcare world.

Interestingly, this process seemed complicated when we began; however, with the highly professional new authors, the book has taken on a life of its own and is due to be published in the fall of 2015. We are excited to see the new book and know that Dan and Sandra will have exceeded our expectations.
was much interest from younger generations in learning more about our work and how to keep the useful knowledge alive and contemporary. Rather than seeing ourselves as the fading generation, it is time to see ourselves as a generation who now has much to share with the younger generations! We believe we created a talented team of wisdom managers to assist in this work.

Further dialogue with the contributing authors provided clarification and enhancement of our ideas and solidified the importance of documenting and sharing generational wisdom, successes, and strategies that we would not repeat. We believe formalizing this process and providing guidelines for colleagues will be an important contribution to professional nursing practice. Each one of our authors has included specific discussion on what the handoff is, some practical tips for sharing knowledge, and exemplars to demonstrate personal experiences (and, of course, some irreverent humor; we all need to laugh and enjoy the nuances of our journey!).

This book reflects our commitment to professional coaching, mentoring, and assuring that our young nurses are not chewed up by the system but are supported proactively. Mentoring is a vital professional behavior and an ethical obligation to our profession; we need to nourish our young rather than engage in the proverbial “eating our young.” In the next section, we share our personal and scholarly connections to the art and science of mentoring.

LIFE JOURNEY: MEMBERSHIP IN THE PROFESSION

Transitions and transformations are a fundamental part of the journey of life. Naturally, as we age and grow, we gather information, skill, insight,
and wisdom that accumulate and aggregate in a way that becomes a part of our characters and personalities. As professionals, one of the most important considerations is the responsibility that membership in the nursing profession brings. Who we are and what we are become a part of our professional identity such that our person and profession become one and the same thing (Malloch & Porter-O’Grady, 2010). As we journey through our careers and our lives and are recognized as professional nurses, we essentially become the “person of the nurse.” As professionals, we integrate our work, our relationships, and our individual persona in a way that creates the frame for who we are and provides the substance of the image we present to the world. Consider a notice you might see in a newspaper about the appointment of a position to an administrative or public role—the writer acknowledges the relationship between the person and profession by identifying the particular individual as a “physician.” However, when a nurse is appointed in a similar fashion to an administrative or public role, he or she will more frequently be identified as a “former nurse.” For the physician the identity is singular; for the nurse the same identity is dual (a nurse is a job different from the administrative or public role and, therefore, cannot be identified in singular terms).

SAGE INSIGHT SHARED ACROSS THE GENERATIONS

We have had many opportunities to work with a number of organizations in helping to increase awareness of the many “sage” resources within those organizations. Often, the usual obligations of work overtake the value of reflection on past experiences, special skills, organizational tenure, insights, and wisdom gained from many years of providing healthcare services. In their haste to embrace contemporary challenges and opportunities for innovation, leaders often forget to access the tremendous acumens and talents of the more mature and long-tenured contributors in their midst. At the same time, those with gifts and...
wisdom to share need also to be available to their colleagues and new members of the professional staff in ways that are open, responsive, and engaging.

A positive and renewing attitude that generates a sense of accomplishment and confidence provides a firm foundation out of which connections between a mentor and mentee can stimulate more positive relationships, meaningful interactions, and learning that can occur only between generations. Handing off knowledge to successive generations implies commitment and communication with those among us who have fresh ideas and different perspectives that need to be included in the dialogue among generations. As consultants with long tenure, we have been able to bring insights from outside the organization that may have already been available inside the organization, but leaders were often tied up with the challenges of the day in ways that didn’t make the same important insights easily visible to them. Taking advantage of these sage resources, leaders can fully access for the organization and for themselves the utility of the wisdom, insight, and history of those in the organization who have much to share.

Often, a part of this scenario is the need to formally access and provide continuity to use of clinical and management leaders who have much of value to share. Sometimes decisions lacking sage information could lead to organizational challenge or failure. As consultants, we often communicate with more mature staff regarding long-term implications of a particular current crisis or challenge in a system. Often, what we have found is that the current critical issue has a direct or implied relationship to a continuum of decisions and actions predicated on a set of assumptions that could have been better informed had the key stakeholders been a part of the decision. Through the consultant’s lens, when leadership uses a succession or leadership handoff system that provides the right information, tools, and insights, many challenges and possible errors in leadership insight and strategy can be easily avoided.
The trajectory of our experiences gives us information with regard to how complex systems work and represents the substance of our development. Along with our learning, our experience provides the platform for translating what we know and what we do in a way that has an impact on our own lives and on other people’s lives and experiences. At the same time, the experience and skills of colleagues and others that are significant in our lives have as much an impact on our development and growth, and those people do their part in influencing the course of our lives and the people we become. In our personal life journeys, there is a sort of developmental dance among our learning, our experiences, insights gained from others, and the relationships we share with people with whom we intersect (Patton, Zalon, & Ludwick, 2015). Each of these influences and the sum of them link within our persona to create a unique and individual life lens and insight related to our world and how we have lived in it.

One of the joys of this life journey is the increased knowledge, insight, and skill we develop as we aggregate experiences and learning relationships. If we have had an open attitude in all these arenas, we have been available to the opportunities to deepen our insights and understandings and broaden our awareness in a way that helps us develop expertise that advances our talent as professionals. One of the urges this dynamic generates is the desire to share and to extend these insights and talents in a way that benefits others who are also eager for learning and personal development. This desire to share knowledge and skill is an outgrowth of our own openness and availability to learning and personal development. Those individuals who understand this dynamic also recognize that embedded in it is the give-and-take reflected in the interaction of all who share a commitment to growing, learning, and deepening their knowledge and understanding.

“I am not a teacher, but an awakener.”
—Robert Frost
For the professional, their community of practice recognizes and affirms both the requisite and desire each member has for both personal development and sharing learning for the benefit of the development of the professional community at large. This developmental relationship over the life of the professional is such an important factor in the health and the success of the professional community that it becomes a requisite of membership and obligation of the professional group to the larger community that the group serves. Embedded deep within the ethos of the profession lies the obligation for relevance and the advancement of practice. For the professional, this obligation means demonstrating a personal commitment to continual self-development as well as a generative obligation to share that development and wisdom with the larger professional community.

LIFE JOURNEY: MENTORSHIP AND SUCCESSION

Over the life of a professional, a continuing and dynamic obligation for personal growth and development and for sharing with peers becomes an obligation that effectively translates into mentorship and succession. Traditionally, as a professional grows, matures, and moves into the senior ranks of his or her professional work group, the professional’s learning and experience transforms from personal growth and development toward a general expectation for imparting wisdom, sharing experiences, and generating insights toward influencing, informing, and developing the younger professional (Swanwick & McKimm, 2011). This expectation for sharing wisdom, of course, operates in concert with the wise individual’s own desire to communicate and share what has been learned, experienced, and developed into exceptional skill or talent.
Frequently at this stage of maturation we hear these professionals addressed as individuals who are informed, politically astute, knowledgeable, wise, or “at the top of their game.” We expect that because of this acknowledgment, these individuals have important things to impart or demonstrate to those at earlier stages of their developmental journeys. Whether formal or informal, this form of mentorship is an expectation of the relationship of the sage or wise person with the younger or less developed in the learning community. Throughout the history of mankind, in a variety of cultures, this mentorship and succession role is described as having a great place in the life of a culture, and both are imbued with the greatest respect and value (Burton-Jones & Spender, 2011).

MENTORSHIP AND SUCCESSION

Although there is certainly an implied and an expected understanding that the experienced and skilled individuals in our profession are leaders and mentors in their practice, it is often not formalized into a design for action or a considered approach to utilizing and developing the products of wisdom, knowledge, and skill in a way that positively informs and benefits the individual, health agency, and the community of practice. More often than not, this important role of mentorship and succession is left to the individual sages to determine how much they are willing to communicate and share of what they have gained over the life of their careers. Rather than making mentorship and succession a normative expectation and part of the sage’s practice, it remains more option and opportunity than obligation and requisite.

“The mind is not a vessel to be filled, but a fire to be kindled.”
—Plutarch
There is increasing—but controversial—discussion as to whether a formal construct of work should include the opportunity for the wise and experienced to play a formal mentorship role that helps to deepen insight and develop practice wisdom in peers and novice practitioners. Much of the controversy centers on the premise that the organization has provided opportunities and a vehicle for the expert to develop experience, skill, and wisdom. It is assumed by these thinkers that a part of the return on the system’s investment is this individual’s obligation to provide a quid pro quo to the organization by giving back to others through insights gained in the opportunities for growth and success provided by the organization (Raes, Decuyper, & Lismont, 2013). A number of mechanisms has been suggested by these authors for this transfer of wisdom to become a more formalized part of the work of the organization and the profession:

• Design and implement a formal mentorship/succession program where mentors are identified and developed into the mentorship role in a way that enhances their skills related to articulating insight, communicating experience, generating value, and developing mentoring and communication skills.

• Create opportunities for narration and storytelling through regular professional community programs or events. At these formal gatherings, sages and mentors with particular knowledge and skill sets would share learning, experiences, and insights related to their area of leadership and practice in a highly interactive format designed to help facilitate translation and application.

• Provide opportunities for sages or mentors to document through journal writing or personal articles those elements or components of their learning journey, experiences, insights, and wisdom garnered from their leadership/practice experiences. While these journals or articles are meant to provide a personal record for the
individual mentor, they can be shared in mentorship sessions, as
organizational memoirs (in libraries or historical references), or
written as published documents available to the public at large.

• Support opportunities for the sage or mentor to videotape insights 
  through the use of interviews, panels, demonstrations, or presenta-
  tions from which an archive can be created for users to access and 
  use at their convenience.

• Hold live, online, national or international, moderated sessions for 
  the sage or mentor to share and interact with the larger profes-
  sional or service community. Construct the sessions in a way that 
  audience members can access wisdom and insight and engage 
  with the sage or mentor in a live question-and-answer portion 
  that emphasizes the relevance and viability to contemporary and 
  future leadership or practice.

These examples are a small sample of the opportunities for general men-
torship and sage sharing. They demonstrate mechanisms for formalizing 
and structuring both the value of mentoring and sharing and the utility 
of that information in informing and advancing the skills and practices 
of the larger practice community. Doing so creates both an opportunity and an 
expectation that such mentoring and succession planning is an ongoing and 
operating part of the life of the profession in generating knowledge, advanc-
ing practice, valuing expertise, and generating new insights.

“True education does not consist merely in the acquiring of a 
few facts of science, history, literature, or art, but in the 
development of character.”

–David O. McKay
MENTORING AND PROFESSIONAL DEVELOPMENT

Although there is clearly an obligation and opportunity for the sharing of experiences, knowledge, and wisdom gained over a lifetime of career experiences, there’s also a personal obligation for all leaders for mentorship and succession (Brockbank & McGill, 2012). In a variety of arenas, the contemporary need for leadership in practice development of individuals is widely apparent. The need, indeed requisite, for creating formal mechanisms of mentorship in light of succession generates from a variety of particular and important demands:

- **Demand to engage younger nurses in leadership**

  There is a paucity of willing and able emergent leaders seeking to engage in the accelerating and complicating demands of contemporary leadership roles in highly complex and transforming healthcare systems. This challenge has reached a critical condition in healthcare. Whether due to the overwhelmingly negative image generated by the apparent stressors and burdens of current leadership, or the accelerating complexity, time demands, and challenges of current leadership roles, there is decreasing interest in assuming these roles among younger members of the professional community. As a result, there is a rapidly increasing need for experienced and talented contemporary leaders to generate an image and capacity for both modeling and engaging professionals with the potential for leadership. The need to translate the role in a way that creates perceptions of excitement, possibility, contribution, and unlimited potential for impact is overwhelming in the current work environment.
• *Demand for leaders to adapt and exemplify the emerging model of healthcare delivery*

Contemporary healthcare system transformation opportunities and challenges create a demand for new kinds of practice leaders who are able to value past practices but are equally capable of engaging new roles and practices that are as yet undefined. The emerging model for healthcare delivery that emphasizes value over volume, mobility over fixed services, digital facility beyond process orientation, and relational integration over vertical hierarchy calls for a new kind of clinical and practice leadership. Understanding the architecture, structures, and dynamics of the emerging value-based and accountability-driven health system with the capacity to translate these realities into contemporary practice requires unique leadership gifts and talents. Redefining these and role modeling the capacity to adapt is a major obligation of the contemporary leadership mentor.

• *Demand to fulfill the role and contribution expectations of younger nurses*

Well-prepared novice nurses and other health professionals are now entering the profession with a higher level of expectation regarding role and impact. Due to the past decade of faculty shortages, the opportunity to select the very best and brightest women and men into the profession has accelerated dramatically. However, along with the opportunity for exceptional intellectual talent has come an associated expectation that these gifts will be embraced, exercise the full extent of one's capacity, and be positively expressed by professional colleagues in practice. This expectation has been generally poorly addressed, leaving new graduates in a frustrated state of flux and
causing a good percentage of them to leave the institutional practice environment within 2 years of graduation. Those new practitioners who persevere frequently go on to graduate schools for advanced degrees, believing they will achieve a higher level of satisfaction in more independent practice roles. Others leave the profession completely. There is obviously an increasing need to alter these experiences and perceptions to keep these gifted new professionals in the practice setting and provide them ample opportunity for rich experiences, meaningful relationships, and opportunities to grow and develop into the clinical leaders that have the potential to grow into successful leadership roles.

• **Demand to assess and identify potential practice leaders as early as possible**

Assessment and identification of potential new practice leaders needs to occur at the earliest point of access in their professional careers. Existing experienced leaders need to have the talent for assessing for potential and identifying individuals who demonstrate aptitude for leadership. Meaningful and important relationships between novice and mentor have been demonstrated as a critical and useful tool in early engagement of leadership capacity. Through the establishment of these relationships and interactions, a trajectory of leadership skill development is established. The potential for engaging and embracing future leadership roles is accelerated through this mentorship process and the formal components of the longer-term program, and new leaders can develop in an environment of encouragement and develop their mentorship relationship in a safe space for leadership risk-taking. For the existing contemporary leader, this model provides an opportunity for
succession leadership development and offers an arena where his or her learned gifts have an opportunity to affect the development of others.

Much has been gained by the individual leader over the long course of her or his leadership journey. These leaders have developed significant and important insights, experiences, and capacity, which results in a large armamentarium of insights and skills that have real utility and value. Imagine how disappointing it is when such important insights and skills are developed but remain essentially locked inside the experienced leader. Here, within the life of the mature leader, is a full range of unique and important attributes, characteristics, and practices that have significance and value when perceived through the lens of the emergent leader (see the following feature). This new leader, perhaps experienced and well educated in the practice arena, may be pregnant with leadership possibility yet is an empty vessel with regard to experience, knowledge, and skill. Through the intersection of the relationship between these two professionals, the value-based partnership should be formally constructed and not left either to neglect or chance, as often occurs in many organizations. Such elements and characteristics of leadership succession are essential to the future viability of the health system and of those who will lead it.

THE DIFFERENCE PERSONAL MENTORING MAKES

Very early in my career, I was given the opportunity to be a protégé and mentee of Irma E. Goertzen, MN, RN, who was assistant administrator of patient services at Providence Medical Center in Seattle, Washington. She recognized early signs of my potential leadership abilities and encouraged me to construct a plan that would develop those skills. At that time I was an associate degree nurse who had no clear plans of continuing my education. Irma promoted me to a shift manager.
role and established regular meeting times with me to talk about my under-addressed career development plan.

With her wisdom, insight, and care, I was able to develop an education and leadership development trajectory that would help prepare me for the possibility of growing and expanding my leadership potential. Irma helped me develop flexibility in my schedule to accommodate learning in my BSN program, served as my advocate and provided recommendations for entry into the master's program, and provided me experiential opportunity through a leadership growth trajectory at the medical center while I was still learning. All through this time, she continued regular and formal mentoring sessions that helped me with both personal and role leadership development through the use of job opportunities and challenges in the workplace. She drew from her own experience, wisdom, and political insight to help me deal with interprofessional and disciplinary processes that helped me mature in my growing and transitioning leadership role. To her credit, and her personal commitment to growing me in the profession, she even suggested when she thought it was time I leave the organization and move into a more significant leadership role, which I did.

I continued to depend on Irma's sage and wise counsel throughout the course of my leadership career. I cannot count the times I drew on her advice and wisdom in moments of challenge and crises. In addition, her enthusiasm for the profession, the significance of the role of the nurse, and her commitment to me and to the person of the nurse in me generated a continuing personal joy and zest for our profession and the opportunities it provided to make a difference in the world.

Irma demonstrated her own leadership in succession planning by nurturing me where I was planted and handing off to me the skills and insights learned in her lifetime of leadership. She mentored me through my developmental transitions and maturation as I struggled to meet the challenges of my leadership trajectory. To this day, when I envision the image of my leadership ideal, it is Irma's face I see.
Following are the five key things that I learned from Irma Goertzen that have informed my leadership and my rules of mentorship over the course of my career:

1. Begin early with leadership development. Discern and capture the potential for leadership in others as soon you observe it and help them begin their leadership trajectory while they are still new and fresh in the role.

2. Mentorship is primarily about relationships and caring. There must be a genuine sense of fondness and connection between mentor and mentee that facilitates the development of real personal communion at a level of communication that engages both the spirit and the potential of the leader within.

3. Regular interaction, communication, and meeting times are important to establishing the discipline of mentorship and leadership development. It takes time to develop and mature the leader within and involves not only conversation in the passage of essential information and learning, but also identification, role modeling, and demonstration of the lessons learned on the leader’s journey.

4. Experiment and conduct small tests of application. Leadership is a learned skill. Most of that learning comes from application and practice. Repeated efforts followed by evaluation and recalibration are critical to developing and refining leadership capacity and skill. My mentor provided fresh insight with regard to testing out application, but I still had to do the work and take the risks.

5. Leadership development is a journey rather than an event. There is no sprinting to the front of the leadership line. There is only perseverance and hard slogging through each day of challenge, some frustration, and small measures of success. Leadership excellence grows over time and its excellence in expression is a discovery. I learned to take time to celebrate small successes and to share my successes with others. Thus, I developed my own mentorship skills and began to have meaningful learning to give to others.

–Tim Porter-O’Grady, DM, EdD, ScD(h), APRN, FAAN, FACCWS
HANDOFF AND SUCCESSION

Succession should not be an incidental or accidental event in any organization. The ability to prepare for the future and to assure that future generations have what they need to thrive and succeed in a highly transforming environment should never be optional if the organization is to thrive. Nursing experts and leaders have much to offer new nurses growing into roles with increasing responsibility. They can be both informed and comforted from the insights gained from practice and leadership sages that have been through it all before. Even if the context and the environment continue to shift away from traditional landscapes of practice, the skills of learning, adaptation, and accommodation and the personal struggles related to handling challenges can be exceptionally useful to new nurses.

The need for a connection between experienced and competent leaders in an organization and emergent members of that same organization is not really optional in any successful system. However, not leaving such matters to chance means the organization takes a serious and formal approach to the issue of succession, and it’s the organization leaders who see succession as a personal obligation of their leadership roles and as a fundamental expression of the leadership capacity (Piper, 2012). If leaders are competent and impactful and it makes a difference in the lives of people and organizations, the leaders have much to contribute in sharing those experiences with others who are just beginning their leadership careers.

Failure to share these contributions does not serve the organization, the sage leader, or the emergent leader (whether clinical or managerial), who will hold many of those leadership roles in the future. In order to understand why, you need only to ask the question, “How many experiences of marginal clinical or management leadership value could have been
bypassed or completely avoided had good leadership mentorship and insight been shared in succession with emerging leaders before they assumed roles where those same issues were confronted? Issues related to staffing and scheduling, conflict management, vagaries of wide-ranging personality characteristics, personal uncertainties related to new clinical practices, and interactional and relational challenges with colleagues, patients, and families could all be better handled with tools gained from those sages and experienced nurses who now handle such issues with comfort and skill.

Real and effective professional handoffs in succession require concerted attention to the following specific realities:

- **Our recognition of the value and significance of our experience and insight**

  There must be a sense of self-value and of legitimacy with regard to the substance of what individuals have to hand off. If we don’t have a firm belief that we have something of inherent value that rises to the significance of transferability, it is equally difficult to see any reason to share it. This personal sense of value informs both the understanding of the importance of our experience or wisdom and how the vision of the capacity translates into a value worth sharing. Self-worth and the importance of our learning and experience are an important first step in recognizing the meaning and transferability of personal wisdom and experience. How much valuable insight and skill are lost to the ages because the individual whose life was committed to honing and refining expertise never felt the worth of it enough to recognize the need to share and transfer it? This failure to see the value of personal wisdom and experience is especially true for nurses who, through a torturous history
of oppression and second-class status, received scant public acknowledgment of their impact and value. Most nurses in the discipline never develop the first-line professional identity where the work of what is gained over a lifetime of learning is expected to be on public display as it is in other disciplines (medicine, law, architecture, engineering, and so on).

- **Organizational commitment to the continuity of knowledge and competency handoffs**

Organizations must recognize that knowledge and competency handoffs are essential to the continuity and sustainability of their trajectory toward continuing success. Long-thriving organizations have a reputation for honoring contribution and building links between generations such that contributions continue over the long term. Organizations that demonstrate strong leadership and an ability to succeed repeatedly over generations exemplify a well-developed continuum of leadership growth, mentorship, internal opportunities for progression, and succession. Each of these frames of reference demonstrates the organization’s capability to inculcate the dynamic of handing off wisdom, expertise, and leadership along an unbroken continuum that assures consistency and continuity over the life of the organization. Hospitals and health systems have not done as well with these definitive organs of continuity, often leaving a significant amount of personal insight and experience on the doorsteps of resignation, retirement, or other turnover. Indeed, the often inexorable ease of onboarding and offboarding nurses and other knowledge resources has served to diminish both the value and exercise of knowledge management, handoffs, and the continuity of professional growth and advancement in many health systems. As a result we continue to struggle
with issues of competence, quality, sustainable impact, and risk. The simple inclusion of a systematic approach to development, advancement, succession, and handoffs in the health system would go far to remedy these challenges.

- The significance and strength of the mentor–mentee bond

Establishment of a sound professional relationship is a cornerstone of the mentorship characterized by the handoff of wisdom and good succession strategies. Societies in which wisdom and age are valued and the expectation is that wisdom is generously shared have a meaningful and generative interaction between generations. In the United States, where social relationships and interaction are more fast-paced and that which is new, different, and emergent has superordinate value, it is much more difficult to establish sound communication linkages between generations. As a result, in many organizations, leaders are sentenced to repetitiveness, and waste is a constant element in strategy, decision-making, and action. How many strategies, decisions, or undertakings that failed could have been avoided if experience with those same conditions and circumstances in the past had been drawn upon to influence the kind and quality of subsequent decisions?

Just because contemporary circumstances may be altered by a transforming environment does not mean that every new occurrence is devoid of historical content. Human experience, reflection, and discernment from previous transactions, iterations, or transformations can serve to inform meaning, reflection, and insight in a way that provides context for current contemporary circumstances. When we value the “discipline of the wisdom of time,” we are provided with a more cautious
and wise methodology for translating environmental impact, contextual influences, and circumstances that guide response and action to the demand for meaningful change and growth. In leadership, this is especially important. The mentor–mentee interaction provides more than an opportunity for wisdom that assures a continuity of growth; it also builds on previously gained insights that serve as the information foundation for the emerging leader. Furthermore, it saves this person from having to begin his or her leadership from “ground-zero” and being doomed to repeat errors of the past. Significance or “tightness” of the relationship between mentor and mentee can guarantee the upward trajectory of leadership growth, assuring that it endures to expand and build on previously gained discernment and wisdom.

Succession structures and processes inside a system and associated with leadership create the potential to sift through history, experience, and insight to select the best each of these has to offer and apply it to the organization and its leaders. The development of a strong and formalized mentorship, handoff, and succession approach creates a dynamic inside the system that sees growth and excellence as a template from which the organization measures success. By using and applying the wisdom, learning, knowledge, and insights gained from mature and experienced members in the organization, the organization can lay a new foundation or “floor” for leadership and work practices. Further improvements and enhancements in practices and behaviors can build from that new floor of wisdom and learning, continually accelerating the trajectory of growth, improvement, and enhancement in a way that assures the organization is able to continually raise the bar. When the gems that are gained from the contribution of mature members of the organization are used, the system is better positioned to compete and to thrive in an
ever-shifting marketplace. This systematic and continuous approach to organizational lifelong learning creates a net aggregated benefit for the organization.

In addition, this formalized infrastructure of valuing knowledge, insight, and experience and incorporating it into the data set for strategy, decision-making, and initiatives gives the organization a leg up on its competition with an internal operating structure that makes mentoring and handing off knowledge a part of its way of doing business. In such a system, expectations abound at every level of the structure: Mature, experienced, wise sages have a medium for communicating the value of their history in an organization that is receptive to it; emerging clinical and management leaders are identified and accessed in a way that associates them with mentors and advisors who can refine and develop their talents to a higher degree of sophistication and value; the system is a methodology and a framework for including the insight and wisdom of its sages in its environmental scanning, strategic processes, and tactical decisions. Within the context of such a system, several values set it apart from the ordinary:

- A real valuing of the wisdom and insight of its sages
- A belief in the need to access the insights and wisdom of the sage in a way that affects the organization and its people
- A dynamic and continuous mentor–mentee relationship that is structured as a centerpiece of the organization's leadership growth and development function
- A systematic and organized structure and process within the organization assuring the valuing of the sages, the utility of their contributions, the transition of their skills, and the effectiveness of their handoffs are inculcated within the organization's way of doing business
In this way, both person and system demonstrate how intensely the contribution of the mature and wise leaders is valued. Here an organized system of communication provides mechanisms for assuring that wisdom is not lost. This communication support system assures that those who are emerging into the roles of clinical and management leadership have access to that learning and can themselves do their part in developing and expanding the wisdom that others will one day draw upon to the benefit of those who will continue to create our future (Brown, 2014).

PERSONAL REFLECTIONS

Tim and I have worked hard to reflect these principles and beliefs in our partnership over the past 20 years. Early in our partnership we realized that we had admiration and respect for each other’s areas of expertise and passion for excellence. Tim is the broader, deeper thinker and futurist, whereas I am the translator of complex topics and the operational expert. In light of our different but complementary strengths, our respect for each other’s work has been without question or exception.

The nature of our writing deserves special mention. We have written books and articles together over the course of our partnership that reflect our regard for each other’s content. As previously noted, during our retreat we try to determine what we will write in the coming year. We have never edited each other’s work and have provided feedback only on the overall content and value of the content to our readers. We have left the grammatical editing to our editors. As we were writing the first edition of Quantum Leadership, I experienced a horrible moment of panic. The editor had edited my chapters, and there were more red marks on the pages than black ink! I was horrified at my lack of writing expertise and called Tim to advise him that, because of the significant amount of editing, I probably was not the best person to write with him. He was
calm and asked me whether the editors had changed any of the meaning of my content. The answer was no—they actually improved the presentation of the information. He laughed and advised me to let the editors keep their jobs. After all, if they had not put some red on the pages, then they had not been doing their jobs. I continue to stick to the content edits and no longer worry about the red ink. This experience in my writing journey can encourage other novice authors to remain engaged in sharing the content of their expertise and, when necessary, rely on expert editors to do their work as well.

Worth sharing is that we have also learned that our trust in each other and ability to predict what each of us is thinking have increased dramatically. From the mentorship perspective, we have recognized the importance of patience, consistency, and openness with each other. With each passing year, we take time at retreats to validate our uniqueness, to affirm that we are not speaking for each other, and to always validate the accuracy of what we are presenting. The openness and transparency of our relationship cannot be underestimated as the foundation of our success. This very special dance between colleagues suggests a continuing effort at developing the fluidity that results in being available for opportunities that might emerge, discussing the implications, and never being afraid of the future.
PERSONAL APPLICATION

The following questions are designed to help you reflect on the knowledge and wisdom you have gained over your career and to facilitate the successful transfer of this knowledge and wisdom to those nurse leaders who, like you, have devoted their life’s work to their patients and to the nursing profession.

1. Handing off between generations is a fundamental obligation of professional relations and mentorship. It assures the continuity of learning, honors the past, and grounds the future.
   • As you review your own experience, describe either an opportunity or an occurrence where the transfer of nursing knowledge occurred from a mentor or an expert directly to you.
   • What example from your own life experience demonstrates your role in handing off knowledge or experience to a new nurse?
   • As you view your own life experiences, what predominant two or three skills, insights, or pieces of knowledge do you now feel have the most value to transfer to others?

2. Keeping knowledge and experiences alive from one generation to the next is an important part of establishing continuity of learning that reflects both evidence and standards of practice.
   • Describe ways where you and your peers use the insight and experience practitioners use in assessing and making judgments about foundations and standards of practice.
   • What is the role that professional experience plays in establishing evidence-based foundations for practice?
   • Select an example from your own history where your practice experience and advice were used to evaluate a standard or best practice.
• How often have you seen yourself as an expert and from that perspec-
tive have been willing to share and contribute insights related to your
experience and standards of practice?

3. This chapter discusses your profession as a part of your life’s journey. For a
professional, the profession becomes a part of one’s person.

• In what ways have you and do you demonstrate to others how integral
your connection to the profession is to your life’s journey?
• What challenges have you confronted with others in the profession that
have tested your commitment to the profession?
• What are some ways you can help new professionals embrace their
professional journey and develop tools to remain faithful to this com-
mitment?
• What is your strategy for dealing with others who have negative things
to say about nursing and discourage others, and how can you pass that
on to new nurses who will confront the same issues?

4. Attitude toward continuous and dynamic change in nursing and healthcare
is critical to how that change will take form and move persons and organi-
zations to improve health services in each generation.

• What is your own attitude to the constancy of change and how has that
been represented in your own behavior and response to the demands of
change?
• What sage advice would you give new nurses with regard to healthcare
change and the insights they may need to embrace and engage in their
practice?
• When a change needs to be refined or scrapped because it is not work-
ing, how have you participated in making that adjustment and posi-
tively modeled that engagement for others?
INTENTIONAL SHARING OF KNOWLEDGE & WISDOM

5. A formal mentorship and handoff program in the nursing organization is necessary to validate the value of practice and leadership succession between generations of nurses.

- Do you have a role to play in developing a formal approach to mentorship and transition that values the opportunity to hand off wisdom and skills between the generations?
- Are you open to the new learning and insights you can gain from younger generations and incorporating their new insights into your own practice life?
- Is it safe in your organization for new nurses to speak out and to be heard when their insights run counter to the prevailing view?
- How do you advocate for next-generation nurses in a way that creates a sense of belonging, involvement, and ownership for them in the life of your practice community?

LOOKING FORWARD

There is no doubt that the collective wisdom of those people who are dedicated to making a difference can truly move mountains and achieve lofty goals. But this doesn’t occur without a considerable level of intention. In this chapter we attempted to communicate as specifically and clearly as possible that the role of the sage and the wisdom he or she represents is critical to successful transition, handing off, and succession. The experienced and wise administrative or practice leader has two obligations: provide a systematic and organized mechanism for the compilation, transfer, and utility of wisdom and experience in a way that has meaning and value for new and emerging nurses; and demonstrate both willingness and capacity to act as wise sage and mentor to others in a dynamic, interactive, and engaging relationship that provides a bridge...
between wisdom and the emergent and energetic learning capacity of new nurses. Through this partnership between a structure for mentorship and succession and the practices and action of mentorship and handing off, the continuum of growing, learning, becoming, experiencing, and gaining wisdom becomes a seamless dynamic between generations of nurses committed to continuing to act in the best interest of those they serve.