



EXECUTIVE WHITE PAPER

On the Road to Excellence, There Will Be Challenges

Evidence-Informed Conceptual Analysis

A scholarly framework for resilient leadership, operational discipline, and continuous improvement



Prepared by
**Kelly Emrick, DHSc, PhD,
MBA, BSRT(ARRT)R**



RECOGNIZE

See the operating reality



ORGANIZE

Translate priorities into roles, resources, and measures



ADAPT

Test, learn, and redesign in response to evidence



DELIVER

Sustain reliable outcomes through accountability

Evidence-Informed Conceptual Analysis

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Core proposition: Challenges are not necessarily evidence that a pursuit of excellence has failed. When rigorously examined, they often signal conditions an organization must redesign, resource, or govern differently to achieve sustained performance.

For healthcare executives, operational leaders, board members, and organizational change practitioners

Report Guide

This white paper is organized as a practical and evidence-informed guide for leadership teams seeking to navigate the inevitable challenges of organizational improvement. It combines scholarly literature with a usable operating framework designed for complex, high-accountability environments.

1. Executive Summary	The argument, implications, and core propositions
2. Purpose, Scope, and Method	How the paper defines its evidence base and intended use
3. Theoretical and Operational Foundation	Why excellence is a capability rather than a single outcome
4. Challenges as Diagnostic Signals	A reframing of resistance, fatigue, and operational friction
5. The ROAD Framework	Recognize, Organize, Adapt, Deliver
6. Governance and Implementation Architecture	How executives convert ambition into an operating system
7. Measurement and Learning System	What to measure, review, and balance
8. Leadership Imperatives	Executive behaviors that protect sustainability
9. Risk Considerations and Mitigation	Common derailers on the road to excellence
10. Conclusion	The leadership case for disciplined resilience
Appendices	Executive diagnostic and 180-day implementation roadmap

USE

This report is a conceptual white paper. It does not present original empirical findings or serve as a substitute for a local readiness assessment, a workforce analysis, a financial impact assessment, or an implementation plan.

1. Executive Summary

The pursuit of excellence is frequently described as a destination. In organizational practice, however, excellence is better understood as a durable capability: the recurring ability to produce safe, reliable, efficient, and meaningful outcomes while learning from deviation, protecting workforce capacity, and adapting to changing conditions. This distinction matters because organizations do not reach excellence by avoiding adversity. They reach it by responding intelligently to adversity when it occurs.

The central premise of this white paper is that challenges on the road to excellence should not be interpreted reflexively as evidence of failure, disengagement, or weak commitment. They may instead reveal unexamined constraints within the operating system: unclear strategic priorities, insufficient time or staffing, competing incentives, inconsistent leadership behavior, fragile workflows, inadequate training, poor technology fit, or a history of initiatives that were launched but never fully integrated. In this respect, challenges are diagnostic data.

This report synthesizes foundational and contemporary literature on organizational readiness, change management, psychological safety, workforce participation, continuous improvement, organizational learning, and change fatigue. The evidence supports a leadership posture that combines purposeful direction with operational humility. Leaders must establish clarity and accountability, but they must also listen for the system-level conditions that make desired behavior difficult. Change management, quality improvement, and implementation science should therefore be treated as interdependent disciplines rather than separate workstreams (Harrison et al., 2021).

THESIS

Excellence is not the absence of difficulty. It is the capacity to make difficulty visible, interpret it accurately, respond without blame, and embed the resulting learning into everyday work.

Executive Implications

- Organizations should define excellence as a balanced performance construct encompassing outcomes, access, reliability, experience, workforce sustainability, financial stewardship, and learning capacity.
- Leaders should differentiate principled resistance, operational friction, and change fatigue before designing interventions. Each has distinct causes and requires a different response.
- Continuous improvement cannot be sustained through project overload. Initiatives must be prioritized, resourced, governed, and intentionally retired when they no longer create value.
- Psychological safety is not a soft cultural aspiration. It is an enabling condition for problem identification, speaking up, team learning, and reliable performance in complex work.
- Sustained improvement requires an explicit learning system: standard measures, visible review routines, frontline participation, executive barrier removal, and adaptation based on evidence.

The ROAD Framework at a Glance

THE ROAD FRAMEWORK: FROM CHALLENGE TO SUSTAINED EXCELLENCE

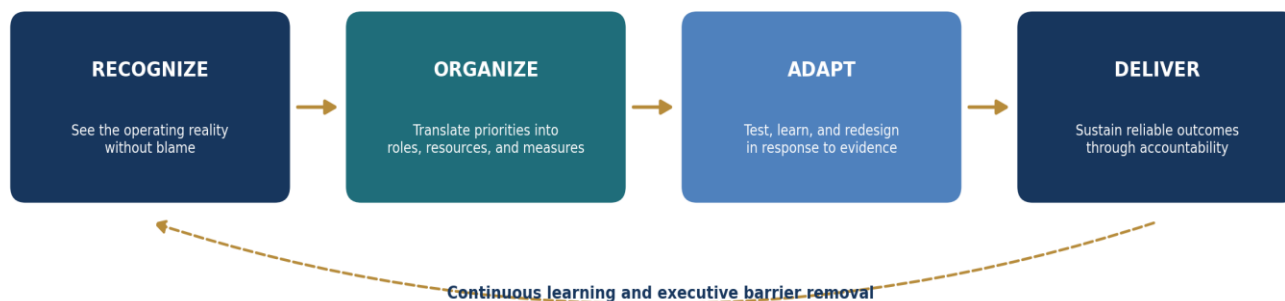


Figure 1. The ROAD Framework: a practical pathway from operational challenge to sustained excellence.

2. Purpose, Scope, and Method

Purpose

The purpose of this white paper is to articulate a conceptual framework for understanding and managing the challenges encountered in pursuing organizational excellence. Although the analysis is broadly applicable across sectors, it is particularly suited to healthcare and other high-reliability environments where operational variation can affect safety, trust, access, financial sustainability, and public accountability.

Scope

The paper examines the leadership and operational conditions required to sustain improvement beyond the launch of an initiative. It focuses on the intersection of strategy execution, work design, workforce engagement, organizational culture, learning, and performance measurement. It does not advocate a single proprietary change model. Instead, it integrates recurring evidence-based themes into a coherent executive operating architecture.

BUILDING RESILIENT, ADAPTIVE, AND ACCOUNTABLE ORGANIZATIONS

Excellence as an Organizational Capability

Reliable outcomes under changing conditions, sustained by learning, capacity, and stewardship.



Method

This report uses an integrative conceptual review approach. The framework was developed through a synthesis of peer-reviewed literature on organizational readiness for change, implementation, and change management models; psychological safety; employee participation; Lean sustainment; organizational learning; leadership; workforce well-being; and health-system performance. The approach is interpretive rather than meta-analytic. Accordingly, the report offers a theory-informed model for executive use, rather than a causal estimate of the intervention effect size.

EVIDENCE BASE

The literature repeatedly identifies leadership commitment, local context, employee participation, communication, workforce capacity, learning mechanisms, and measurement discipline as recurring conditions of successful improvement and change sustainment (Harrison et al., 2021; Kunnen et al., 2023; Lyman et al., 2019).

3. Theoretical and Operational Foundation

3.1 Excellence as an Organizational Capability: A narrow view of excellence treats it as an end-state performance score: a target achieved, an award received, a benchmark reached, or a favorable quarter. That framing is insufficient in complex organizations because performance is dynamic. Staffing changes, demand variation, technology failures, regulatory expectations, market shifts, and leadership turnover continually alter the conditions under which work is performed. A more rigorous definition views excellence as the ability to produce intended outcomes reliably under changing conditions while preserving the capacity to learn and improve. This capability has at least six dimensions:

strategic coherence, operational reliability, workforce capacity, adaptive learning, stakeholder value, and stewardship of resources. An organization may be financially successful yet operationally fragile. It may be technologically sophisticated yet culturally silent. It may have motivated employees, yet it lacks the governance mechanisms to translate motivation into sustainable results. Excellence requires integrating these dimensions, not optimizing one at the expense of the others.

3.2 Readiness Is Collective, Not Merely Individual: Organizational readiness is often reduced to whether employees appear willing to accept a particular initiative. This underestimates the construct. Readiness involves collective commitment to a course of action and collective efficacy in executing it. Weiner’s theory of organizational readiness emphasizes that commitment and efficacy are shaped by perceived task demands, resource availability, and situational factors in the implementation environment (Weiner, 2009). This perspective shifts the burden of inquiry. Rather than asking only, “Why are people resisting?” leaders should also ask: “What does the system make difficult?” In healthcare, these questions may reveal unprotected implementation time, staffing or technical support shortages, unclear role boundaries, competing compliance demands, weak data integrity, or a disconnect between executive intent and frontline workflow. The remedy is not always persuasion. It may be redesigned.

3.3 Improvement Requires the Integration of Three Disciplines: Change management, quality improvement, and implementation science are commonly administered as separate activities. In practice, they are mutually dependent. Change management creates shared direction and addresses the social and behavioral dimensions of transition. Quality improvement uses disciplined methods to understand processes, variation, and local testing. Implementation science examines how evidence-based practices become routine in real-world settings. A systematic review by Harrison et al. (2021) found that models from these traditions overlap substantially but are often applied in isolation. Excellence efforts are more likely to endure when leaders intentionally integrate the three.

4. Challenges as Diagnostic Signals

The language leaders use to describe challenges shapes the interventions they choose. When a missed milestone is characterized as poor accountability, the response may be to monitor or escalate. When the same event is interpreted as a symptom of competing priorities or insufficient capacity, the response may be reprioritization, work redesign, or resourcing. Neither interpretation should be assumed. Each requires evidence. The practical discipline is to treat challenges as signals that deserve diagnostic inquiry before judgment.

4.1 Distinguishing Resistance, Friction, and Change Fatigue: Resistance is not inherently dysfunctional. It can reflect legitimate concern about patient safety, resource allocation, professional identity, ethical implications, implementation feasibility, or loss of local autonomy. Friction refers to the operational effort, delay, rework, ambiguity, or coordination burden created by a new process. Change fatigue is different again: it describes the stress, exhaustion, and burnout that can accompany rapid, continuous, or poorly integrated organizational change (Beaulieu et al., 2023). Conflating these phenomena produces weak managerial responses.

Challenge Topology: From Surface Symptom to Leadership Response

Observed pattern	Most likely underlying condition	Diagnostic question	Executive response
Questions or pushback	Principled concern, local expertise, or insufficient clarity	What risk or operational constraint is being identified?	Invite a structured challenge; document and resolve the concern.
Slow adoption	Workflow burden, poor fit, insufficient training, or competing demand	What makes the desired behavior difficult in the workplace?	Simplify process; test locally; remove barriers.
Cynicism or withdrawal	Unclosed initiatives, low trust, weak feedback loops	What prior experience has shaped confidence in this effort?	Demonstrate follow-through and visible leadership action.
Overload or burnout	Change fatigue, staffing insufficiency, and resource depletion	What is the cumulative change burden on the team?	Sequence initiatives, protect capacity, and retire low-value work.

Employee involvement is not simply a morale tactic. A systematic review of human resource management practices and performance found that employee participation in the design and implementation of changes affecting their work was supported by available evidence, and that quality-improvement team participation in health settings was associated with improved patient outcomes (Patterson et al., 2010). The implication is direct: the people closest to the work should be engaged not merely as recipients of change, but as co-designers of viable solutions.

4.2 Psychological Safety as an Operating Requirement: In complex environments, the ability to speak up about risk, uncertainty, and failure is a prerequisite for learning. Psychological safety refers to a shared belief that it is safe to take interpersonal risks within a team, including asking questions, admitting uncertainty, or raising concerns. A systematic review of healthcare teams identified leadership, communication, familiarity, support, and inclusion as important enablers of psychological safety (O'Donovan et al., 2020). For executives, the practical question is whether the management system makes difficult information easier or harder to surface. A culture that punishes surprise may suppress early warning signals until they become major operational events. A culture that values escalation and inquiry is more likely to identify risks while correction is still feasible. Excellence, therefore, requires a disciplined, no-blame approach to system learning while maintaining clear accountability for professional conduct and agreed standards.

5. The ROAD Framework

The ROAD framework translates the preceding analysis into a usable executive model. Its four stages are recursive rather than linear. Organizations will repeatedly recognize new conditions, organize their response, adapt in light of evidence, and deliver revised performance. The framework is intentionally simple because its purpose is not to create another layer of methodology. It is designed to structure leadership attention around the work that must occur for improvement to endure.

5.1 Recognize: See the Operating Reality Without Blame: Recognition requires leaders to move beyond report-outs and view work as it is actually performed. This involves triangulating quantitative performance data, direct observation, staff testimony, customer or patient experience, process mapping, and review of variation across units or sites. The central requirement is candor. A reliable organization does not confuse favorable narratives with operational truth.

Leadership practice: Create a routine in which leaders ask frontline teams what prevents reliable execution, what rework they tolerate, which handoffs fail, and what workaround is silently compensating for a broken process.

5.2 Organize: Convert Ambition Into an Execution System: Organization is the discipline of translating strategic intent into operating clarity. Every material improvement effort should specify the problem, desired outcome, accountable executive, operational owner, affected stakeholders, resources, measures, review cadence, and escalation route. Without these elements, change is experienced as an additional request rather than an integrated part of the work system. Organizing also means making choices. Not all worthy projects should proceed at the same time. Initiative overload is a predictable cause of implementation failure, especially in organizations with workforce constraints. Executives must have the discipline to defer, sequence, combine, or retire work that exceeds the organization's absorptive capacity.

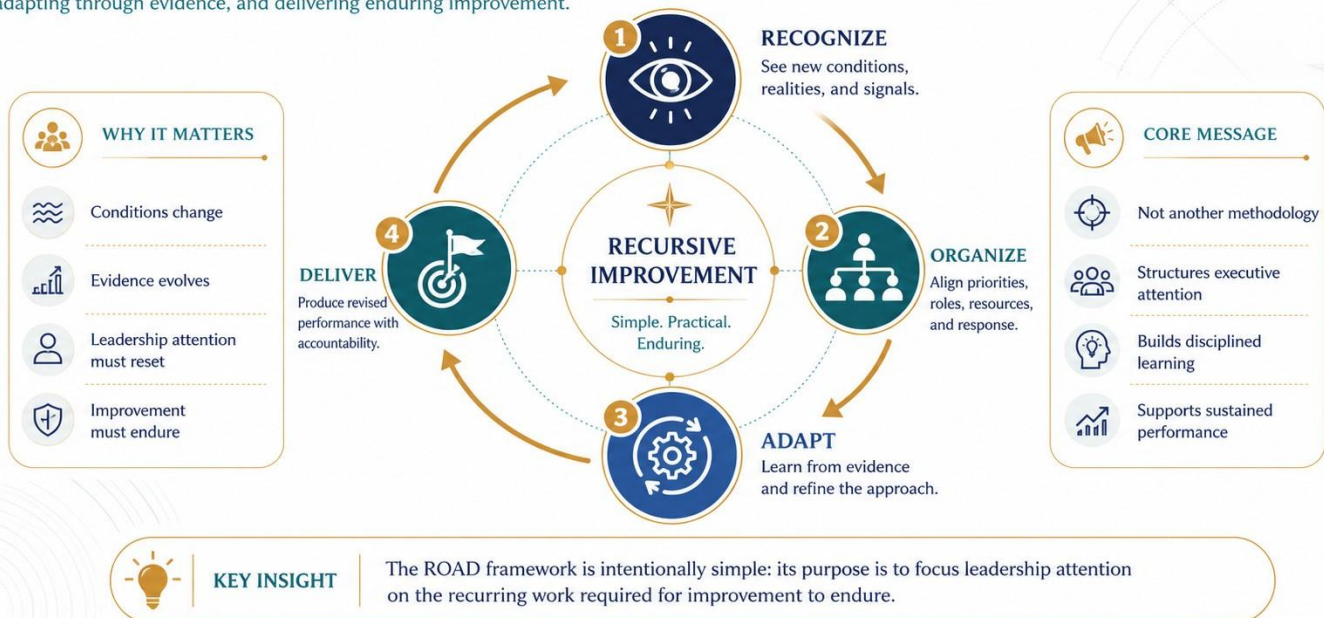
5.3 Adapt: Test, Learn, and Redesign: Adaptation is the point at which leaders treat implementation as a learning process. Local context matters: a process that works in one department, hospital, clinic, or business unit may require modification elsewhere because of staffing, physical layout, technology, service mix, governance, or population needs. Local adaptation should not be confused with uncontrolled variation. The governing principle is standardization of purpose and outcomes, with thoughtful adaptation of methods when conditions differ. Organizational learning occurs when experience is translated into changes in collective knowledge, cognition, and action (Lyman et al., 2019). This requires defined mechanisms: huddles, visual management, after-action reviews, rapid-cycle tests, operating reviews, transparent dashboards, and cross-unit knowledge transfer. These mechanisms create a feedback loop between strategy and the work itself.



LEADERSHIP FOR SUSTAINED EXCELLENCE

The ROAD Framework

A recursive executive model for recognizing conditions, organizing response, adapting through evidence, and delivering enduring improvement.



5.4 Deliver: Sustain Reliable Outcomes: Delivery is not the completion of a project plan. It is the sustained achievement of outcomes under ordinary operating pressure. It requires reinforcement through management routines, competency development, standard work, process ownership, and measurement. Lean sustainment literature highlights the importance of employee mobilization, leadership commitment, local context, improvement culture, and learning culture. It also identifies predictable threats: insufficient resources, lack of leadership follow-through, overburdened staff, and omission of workforce involvement (Kunnen et al., 2023).

RULE OF THUMB

Do not declare an improvement complete because it was launched. Declare it complete only when the intended behavior is embedded, the outcome is sustained, and the work can withstand predictable operational disturbance.

6. Governance and Implementation Architecture

The ROAD framework requires an operating architecture that makes improvement visible, governable, and sustainable. This architecture should be proportionate to the organization's size and complexity, but the underlying disciplines are widely applicable.

6.1 Executive Governance Structure: A durable excellence program needs unambiguous executive sponsorship, a defined decision authority, operational ownership, and a regular performance-review cadence. Governance should not become a substitute for action. Its purpose is to remove barriers that frontline and middle-management teams cannot resolve independently, to prevent competing priorities from proliferating, and to ensure that strategic aims remain linked to outcomes.

Recommended Governance Elements

Element	Primary responsibility	Evidence of discipline
Executive sponsor	Clarifies strategic priority; resolves cross-functional barriers	Visible decisions; resource alignment; removal of conflicting directives
Operational owner	Designs and manages the work system	Clear workflow, roles, standard work, and adoption plan
Frontline co-design group	Validates feasibility; identifies risks and workarounds	Documented feedback, local tests, and improvement suggestions were acted upon
Performance-review forum	Interprets measures; decides escalation and adaptation	Balanced dashboard; action log; rapid response to variation
Learning mechanism	Spreads valid learning and rejects ineffective approaches	After-action reviews, updated standards, and cross-unit transfer

6.2 Implementation Sequence

1. Establish the baseline. Define the operating problem, the affected stakeholders, the current-state performance, the source of variation, and the material consequences of inaction.
2. Assess readiness and capacity. Evaluate workload, staffing, technology, training needs, leadership alignment, prior initiative history, and the degree to which the proposed solution fits local conditions.
3. Co-design the intervention. Engage the individuals who perform, receive, or depend upon the work. Use their expertise to identify failure modes, exceptions, and necessary local adaptations.
4. Pilot and learn. Begin with controlled testing, explicit measures, and short feedback cycles. Avoid large-scale rollout before the organization understands the operational consequences.
5. Scale with standardization. Define non-negotiable standards, local adaptation boundaries, competency expectations, ownership, and a communication plan.
6. Sustain and renew. Embed measures in standard management routines, conduct periodic review, refresh competencies, and retire requirements that no longer add value.

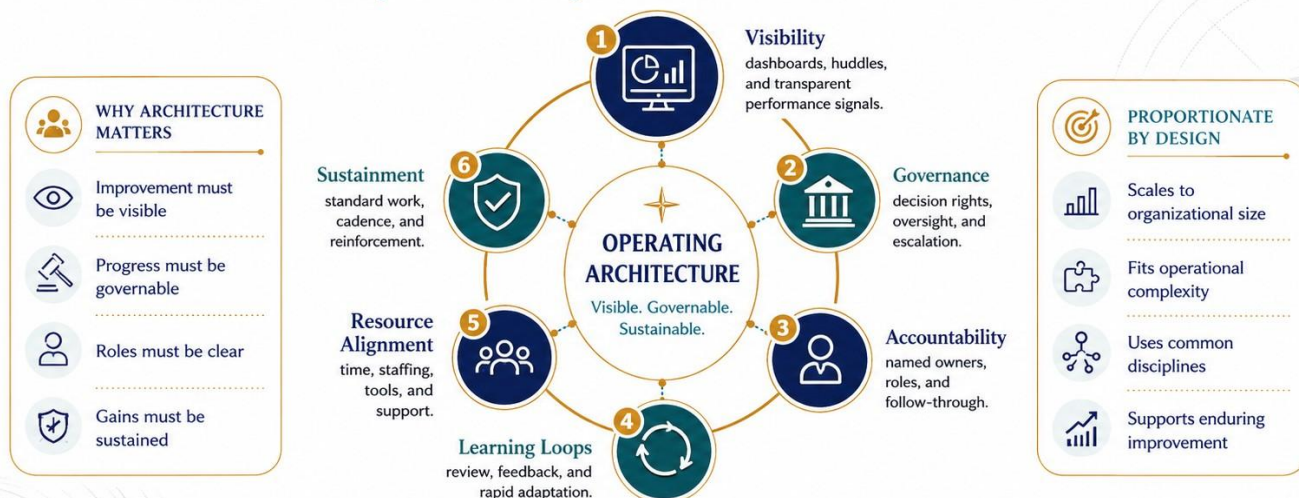
7. Measurement and Learning System

Measurement is essential to excellence, but measurement without interpretation can create a false sense of control. Dashboards should be designed as decision-support tools, not data repositories. Every material measure should answer a leadership question: What is changing? Why is it changing? What action is indicated? Who has the authority to act? What support is required?



Operating Architecture for Enduring Improvement

An executive structure that makes improvement visible, governable, and sustainable.



KEY INSIGHT

Effective improvement depends not only on ideas, but on an operating architecture that turns intentions into visible, governable, and sustainable performance.

7.1 Balanced Measurement Architecture: A credible measurement system includes outcome, process, balancing, and learning measures. Outcome measures show whether the organization is producing value. Process measures show whether the critical work is being performed as designed. Balancing measures reveal unintended consequences, such as increased workload, cost shifting, access problems, or staff dissatisfaction. Learning measures show whether the organization is becoming more capable of detecting, sharing, and resolving problems.

Measure family	Purpose	Illustrative measures	Leadership question
Outcome	Assesses value created	Safety, quality, access, experience, cost, reliability	Are we achieving the intended result?
Process	Assesses execution fidelity	Cycle time, completion rate, adoption, and handoff reliability	Is the work occurring as designed?
Balancing	Detects trade-offs	Workload, overtime, staff turnover, rework, complaints	What is improving at another domain's expense?
Learning	Assesses organizational capability	Escalations resolved, ideas tested, time to response, lessons adopted	Are we becoming better at solving problems?

In healthcare, workforce capacity cannot be treated as a secondary balance measure. Longitudinal evidence supports an association between higher registered-nurse staffing and lower mortality, underscoring that staffing conditions may influence not only employee experience but also clinical outcomes (Dall'Ora et al., 2022). Although the specific operational indicators will vary by setting, leaders should be cautious about declaring efficiency gains when those gains are purchased through unsustainable workload transfer.

7.2 Review Cadence

- Daily or shift-based huddles for immediate operational barriers, safety risks, demand variation, and escalation needs.
- Weekly operational reviews for process performance, adoption, exception patterns, and rapid-cycle decisions.
- Monthly executive reviews for cross-functional barrier removal, resource reallocation, strategic alignment, and risk management.

- Quarterly learning reviews for sustainment, initiative portfolio management, competency refresh, and dissemination of validated lessons.

8. Leadership Imperatives

The road to excellence is ultimately a leadership test because leaders shape the conditions in which teams interpret priorities, surface risks, allocate attention, and make decisions. Leadership is not limited to communication at the beginning of change. It is visible in the routine behaviors that determine whether the organization listens, learns, and follows through.

Eight Leadership Imperatives

- 1. Define the destination precisely.** Explain what excellence means in operational terms and identify the balanced outcomes that will determine success.
- 2. Make trade-offs explicit.** Protect the organization from initiative overload by deferring or stopping work that is not strategically essential.
- 3. Bring leaders to the work.** Use direct observation and structured listening to understand the lived reality of execution.
- 4. Reward truth-telling.** Treat early escalation, dissent, and evidence of risk as essential information, not as disloyalty.
- 5. Remove barriers visibly.** Demonstrate that leadership action follows frontline feedback; otherwise, participation deteriorates into performative consultation.
- 6. Protect capacity.** Recognize that transformation is labor. Allocate time, training, staffing, and technical support commensurate with the demands of change.
- 7. Learn in public.** Share what was attempted, what worked, what did not, and what will change next. This builds organizational memory and trust.
- 8. Sustain the system after launch.** Ensure that measurement, standards, ownership, and review routines outlive the initial project and the individuals who initiated it.

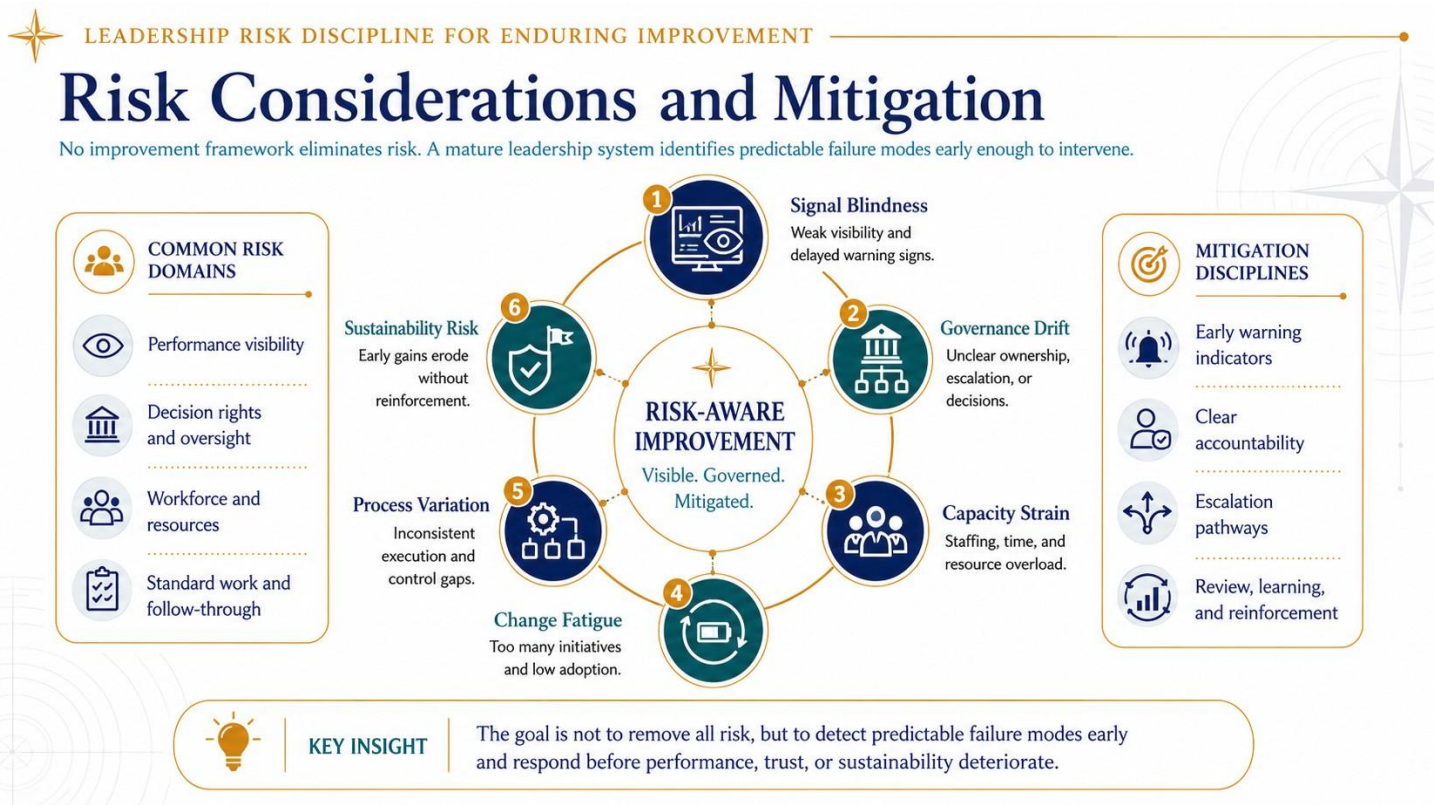
9. Risk Considerations and Mitigation

No improvement framework eliminates risk. The purpose of a mature leadership system is to identify predictable failure modes early enough to intervene. The following risks commonly undermine the pursuit of excellence across complex organizations.

Risk	How it derails excellence	Mitigation discipline
Initiative overload	Competing work fragments attention and creates change fatigue	Maintain a transparent portfolio; sequence work against capacity.
Leadership inconsistency	Staff experience mixed messages and weak follow-through	Align executive communication, decisions, and resource allocation.
Metric fixation	Teams optimize a number while losing sight of value or balance	Use outcome, process, balancing, and learning measures together.
Top-down implementation	Local feasibility and tacit expertise are ignored	Require frontline co-design and controlled pilot testing.

Risk	How it derails excellence	Mitigation discipline
Premature scale-up	Unresolved failure modes are replicated across the organization	Pilot, validate, standardize, then scale.
Failure to institutionalize learning	Gains disappear after leadership attention shifts	Embed review routines, ownership, and updated standard work.

The evidence on Lean sustainment is instructive: improvement work is jeopardized when staff are overburdened, employee involvement is omitted, resources are insufficient, leadership follow-through is weak, or local context is not respected (Kunnen et al., 2023). These are not peripheral execution details. They are often the conditions that determine whether a promising intervention becomes a durable operating practice.



10. Conclusion

On the road to excellence, there will be challenges because meaningful improvement disrupts routines, exposes hidden variation, tests leadership consistency, and asks organizations to learn faster than their environment changes. The presence of such challenges should not be romanticized; some reflect genuine risk, capacity deficits, or design failure. Nevertheless, neither should challenges be treated as a reason to retreat from transformation. They are often the most useful evidence an organization receives about the current limitations of its operating system. The mature response is neither denial nor blame. It is a disciplined inquiry. Leaders must recognize reality, organize a coherent response, adapt based on learning, and deliver results through sustained accountability. This ROAD framework offers a practical way to do so. Its purpose is not to make improvement easy. Its purpose is to make the organization better able to meet challenges with clarity, humility, and operational discipline.

FINAL THOUGHT

The most credible measure of excellence is not whether an organization encounters obstacles. It is whether the organization can convert obstacles into better design, better decisions, stronger capability, and more reliable value for those it serves.

Appendix A. Executive Diagnostic: Are We Ready to Travel the Road?

Use the following diagnostic questions during executive planning, initiative review, or organizational-performance assessment. A “no” or “uncertain” response should be treated as a condition requiring action, not as a reason to assign blame.

1	Can we state the strategic problem in a way that frontline employees, leaders, and stakeholders consistently understand?
2	Have we defined a balanced set of outcomes and identified the trade-offs we will monitor?
3	Do we understand the current workflow, its variations, and the workarounds that staff use to keep the system functioning?
4	Have we assessed staffing, workload, technology, training, and leadership capacity before adding a new expectation?
5	Were employees who perform the work involved in designing the intervention and identifying failure modes?
6	Are the implementation roles, decision authority, resource commitments, and escalation paths explicitly defined?
7	Does our measurement system include outcome, process, balancing, and learning measures?
8	Do leadership routines make it safe to surface bad news early?
9	Have we protected time to test, learn, adapt, and reinforce the new way of working?
10	Do we have a deliberate sustainment plan that extends beyond launch and beyond individual leaders?

Appendix B. Illustrative 180-Day Implementation Roadmap

Time horizon	Primary aim	Core actions	Evidence of progress
Days 0-30	Recognize	Define the problem; map current work; establish baseline; assess readiness and capacity; identify stakeholders.	Baseline approved; risks documented; governance established.
Days 31-60	Organize	Set goals and measures; appoint owners; form a frontline co-design group; align resources; sequence portfolio.	Implementation charter, dashboard, communication, and training plan.
Days 61-120	Adapt	Conduct pilot; hold weekly reviews; analyze variation; resolve barriers; modify workflow and standard work.	Documented tests; reduced friction; improved process reliability.
Days 121-180	Deliver	Scale validated design; embed review routines; refresh competencies; monitor balancing measures; share learning.	Sustained outcome improvement; formal ownership; sustainment plan.

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