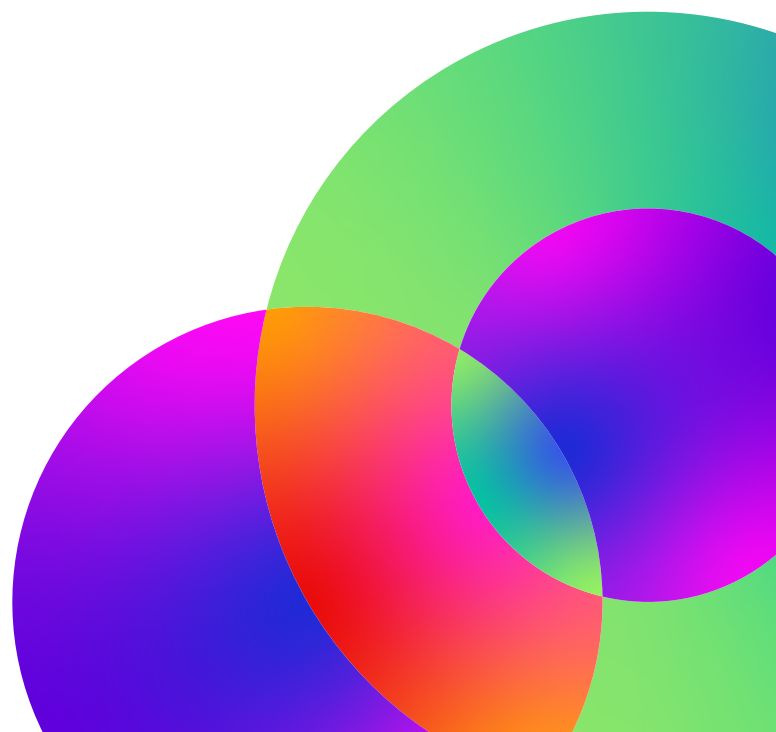# Healthcare Executives Provide Insights for Turning Workforce Data Into Balanced Outcomes

Industry survey and research report

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Expect and Get More from Your Workforce Management Strategy

Over the last decade, workforce management has gone from tactical to strategic to mission critical as health systems face new challenges. Today, a health system's success hinges on having a sustainable, available and qualified workforce.

Yet, healthcare will lose one million RNs from the nursing workforce between now and 2030, causing the job market to become tighter and more competitive1.

There continues to be an increased emphasis on value, from both payers and the patient community. This shift is creating greater interest in both patient-centered staffing and equitable workloads in order to improve both patient and staff satisfaction.

With high quality, affordable care a top priority, health systems cannot afford to have lagging analytics or a lack of actionable data. Without an accurate, enterprise-wide view of staffing needs, the organization will have staffing chaos as patient care needs flex up and down.

There is a need to build balanced schedules based on actual patient needs and the qualified, available staff who will care for them. Also important is a disciplined approach to managing labor productivity daily, where health systems can utilize practical solutions to address gaps in meeting budgeted targets.

Innovations in both technology and workforce management strategy are providing health systems with the ability to use the mountains of transactional data to optimize the workforce in a way that positively impacts patients, staff and the bottom line.

To gain insights about the outcomes health system executives aspire to achieve with their workforce management strategy and the factors that make those initiatives successful, symplr partnered with Becker's Hospital Review to conduct a survey of 127 healthcare executives. We then followed up with in-depth interviews with several survey participants and some symplr customers. Here's what we learned.

As the Vice President of a comprehensive academic health system on the West Coast shares

"The future of healthcare rests in the hands of specialized teams with collective, multidisciplinary knowledge and dynamic skills to solve the complex disease situations."

1. "HOW SHOULD WE PREPARE FOR THE WAVE OF RETIRING BABY BOOMER NURSES?," HEALTH AFFAIRS BLOG, MAY 3, 2017. HTTPS://WWW.HEALTHAFFAIRS.ORG/DO/10.1377/HBLOG20170503.059894/FULL/

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Workforce Management Strategies Impact Multiple Key Outcomes

Historically, many organizations viewed workforce management initiatives mainly as cost-cutting strategies. As the industry continues to move from a volume to value model, healthcare organizations are expecting much more from their workforce management strategy. While cost containment is still vital, how the organization manages its workforce impacts far more than financial metrics. A survey of 127 healthcare executives conducted by Becker's Hospital Review found that they're relying on their workforce management strategy to deliver outcomes in the following areas:

- Patient safety
- Clinical outcomes
- Staff engagement
- Compliance (regulatory and union agreements)
- Patient engagement
- Labor cost containment
- Throughput and capacity management

The director of productivity and performance improvement at a 3400-employee regional medical center in the West explains,

"We're approaching our workforce management strategy through a balanced outcomes approach. As we make all of the incremental changes across the continuum, we keep in mind the key performance indicators across five areas: clinical, financial, patient satisfaction, staff engagement and compliance. This is not just a cost-cutting initiative. Of course it has an impact on labor costs as we improve efficiencies, but as we define the clinical, patient experience and staff engagement aspects of our workforce management initiative, we realize that they are all interconnected. What we do will impact the financial piece, but it also has downstream effects."

Workforce Management Initiative Outcomes

We asked survey respondents about the outcomes they desired from their workforce management strategy and their organization's ability to achieve those outcomes.
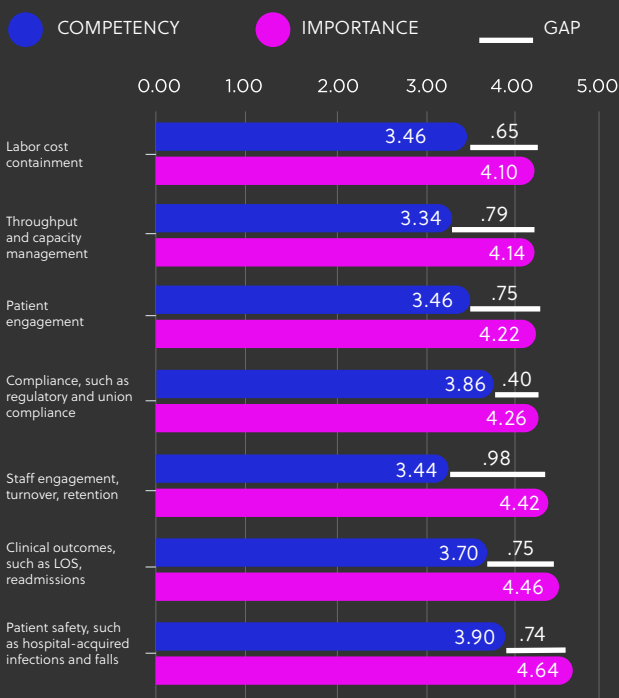
Question 1: IMPORTANCE
How important is it for a health system's workforce management (WFM) strategy to deliver measurable outcomes in the following areas? Answers were on a scale of 1 (Not Important) to 5 (Mission Critical)

Question 2: COMPETENCY
How successful is your organization's WFM strategy delivering measurable outcomes in these areas?
Answers were on a scale of 1 (Little or No Measurable Outcomes) to 5 (All the Measurable Outcomes We Want)

Closing the Gap with a Balanced Outcomes Approach

The Becker's Hospital Review survey also showed that there are still some wide gaps between the outcomes desired and the outcomes being realized. The biggest gap is in the area of staff engagement, followed by throughput and capacity management, patient engagement, clinical outcomes and patient safety. The smallest gaps were in the areas of regulatory and union compliance and labor cost containment.

Often, those gaps between desired and actual outcomes can be attributed to an unbalanced approach to workforce management, where too much emphasis is placed on labor cost-cutting measures, without enough focus on other key areas. A narrow focus on financial outcomes can lead to missed opportunities to achieve outcomes in other areas. Even worse, an overemphasis on financial results can inadvertently cause negative outcomes in other areas.

The negative impact of an imbalanced approach to workforce outcomes is being felt at health systems nationwide. As the Executive Director of Productivity and Benchmarking at a large non-profit health system in the West shares,

"Many hospital executives default to across the board reductions foregoing the learning process of improving the quadruple aim [improving the health of populations, enhancing the experience of care for individuals, reducing the per capita cost of health care, attaining joy in work]."

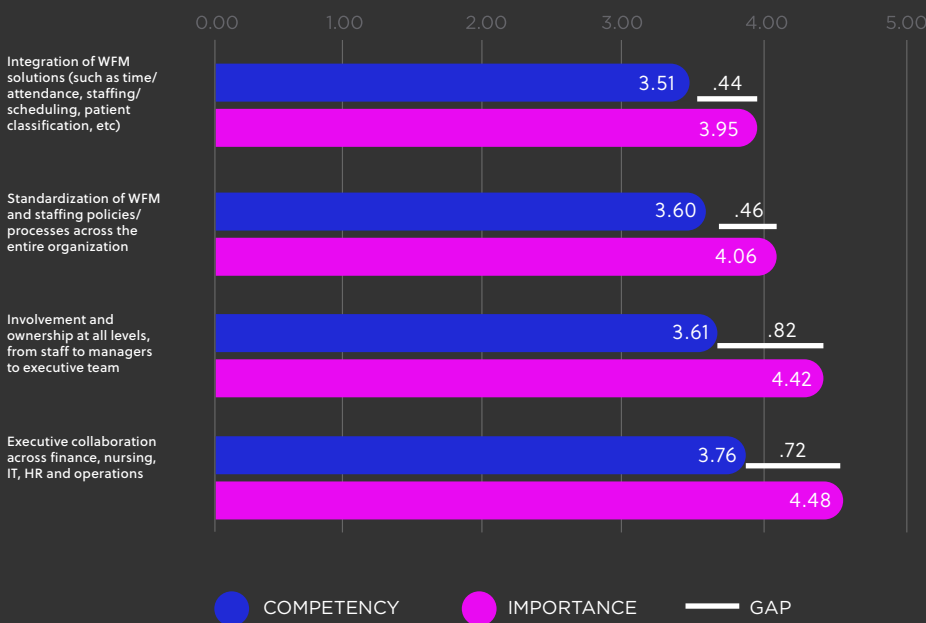The Vice President and CNO at a medical center in the South explains,

"Our organization has not identified all outcome opportunities available through workforce management. Perhaps as patient satisfaction scores and a safer working environment take on equal importance to financial outcomes, the organization will be more open to being more proactive."

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Workforce Management Initiative Success Factors

A successful workforce management strategy is built on the ability to turn workforce data into balanced outcomes. This requires putting the right technology, policies, processes and people in the right places. Factors ranging from staff involvement to executive support, and from integrated solutions to standardized policies, all play a critical role in achieving balanced outcomes.

Workforce Management Initiative Success Factors

Factor		
0.00	1.00 2.00 3.00	4.00 5.00

Integration of WFM solutions (such as time/attendance, staffing/scheduling, patient classification, etc)
- Competency: 3.51 | Gap: .44
- Importance: 3.95

Standardization of WFM and staffing policies/processes across the entire organization
- Competency: 3.60 | Gap: .46
- Importance: 4.06

Involvement and ownership at all levels, from staff to managers to executive team
- Competency: 3.61 | Gap: .82
- Importance: 4.42

Executive collaboration across finance, nursing, IT, HR and operations
- Competency: 3.76 | Gap: .72
- Importance: 4.48

● COMPETENCY ● IMPORTANCE ▬ GAP

As part of the survey, we asked respondents two questions about factors needed for a successful workforce management initiative.

Question 1: importance
How important are the following factors to a successful workforce management strategy? Answers were on a scale of 1 (Not Important) to 5 (Mission Critical)

Question 2: Competency
How well is your organization performing in these areas regarding your WFM strategy? Answers were on a scale of 1 (We Don't Have This) to 5 (This is a Strength for Our Entire Organization)

Finding the Competency Gaps

When we did further analysis of the survey participants' responses to the questions about workforce management initiative success factors, we saw that there were gaps between how important they felt each factor was and how well their organization was performing in those areas. The largest gaps were related to people, including involvement at all levels across the organization and executive collaboration.

Closing the Competency Gaps

Across the country, healthcare executives are expecting more from their workforce management strategy, recognizing that the changing dynamics of the industry require an ongoing focus on how to manage the workforce to achieve and sustain key outcomes.

As the Chief Operating Officer at the 3400-employee regional medical center in the West explains,

"From the very beginning we were concerned about sustainability, and we recognized this was not going to be a finite endeavor; instead, it was really a commitment to our future."

After partnering with customers across the country to complete thousands of workforce management system implementations and successful workforce management initiatives, our team at API Healthcare developed a proven methodology for turning workforce data into balanced outcomes.

The Becker's survey and follow-up interviews reinforced that ongoing success is built on a workforce management strategy that optimizes the following components:

- Data
- Technology
- Policy and Process
- People
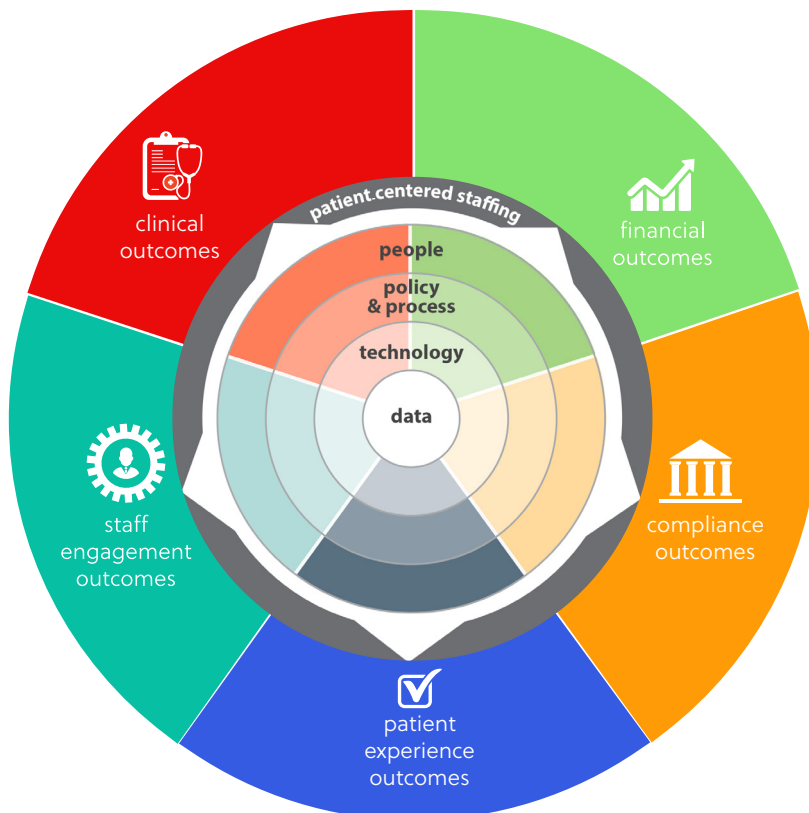
The process starts with data:

- Staff – skill, credentials, patient mix, equitable assignments, continuity of care
- Patient – acuity, complexity, pain, communication, medication, family
- Operational – ADT, unit layout, unit flow, labor budget and costs

As the Regional Executive, Clinical Resources at a large non-profit health system in the Northwest observes,

"The data and analytics that we have available to us now to do the right work were not available 8-10 years ago. These analytics and available data also assist us in identifying outcome opportunities."

The SVP Chief Experience Officer at a 575+ bed integrated health system in the Midwest also makes data a priority,

"We do have key metrics we measure regularly to tell the story on our workforce. We are also implementing a new system this year which will bring even more data and succession planning metrics to our organization. Linking these data sets will be necessary for us over the coming year."

The large non-profit health system in the Northwest also has a strategy for leveraging their data. The Regional Executive, Clinical Resources shares,

"We have implemented the use of analytics and regularly use data to consistently drive decisions and help us understand where gaps exist in advance, as well as the root cause for the gaps. In the past we could get to the day of staffing and be surprised, 'wringing our hands' trying to figure out how to manage staffing at the last minute. When gaps go unfilled until the last minute, the solutions are one of the following: 1) divert, 2) agency, or 3) overtime. With the use of analytics, we monitor schedules shortly prior to posting to make sure all staff are working their full FTE (no FTE leakage). We have built our schedules based on ADT and census history rather than on tribal knowledge, and our schedules are balanced."

Get the right technology tools to support the initiative(s)

Success requires more than data. To avoid being data rich and information poor, many health systems rely on technology to make the data easily accessible and actionable. Key technology considerations include integration, mobile strategy and analytics tools.

The Director at a Productivity and Performance Improvement regional medical center in the West provides an explanation of their integrated technology strategy:

"As we created our workforce management strategy roadmap, we knew we needed to fully leverage the technology so we can empower our staff to take care of their patients and the community we serve. We partnered with our workforce management vendor so that the functions of time and attendance, staffing and scheduling, outcomes analytics and patient classification could all tie together. We want to put analytics and data into the hands of managers as real time as we can get it.

We can then use those analytics to project overtime and make adjustments. We also want to leverage mobile technology, especially for open shift notifications so that it's easier for the central staffing office to fill open shifts. Then, we will use integrated patient classification to look at acuity and orders and documentation [from the EHR] to give a clearer picture of patient needs, which allows the central staffing office to make better assignments. Ideally, that enables us to impact those global metrics we're looking at in terms of patient quality, staff and patient satisfaction and HCAHPS scores."

The Chief Operating Officer adds, "It really is an answer to what our leaders have been asking for. Our leaders want to be able to lead and manage in real time, and this will enable us to do that."

At a large teaching hospital in the Southwest, the Executive Vice President and Chief Nursing Officer explains how they plan to use workforce management technology to identify and achieve more outcomes: "We have not identified all outcome opportunities available through workforce management optimization. There are many opportunities, especially in the financial arena and clinical (patient flow) areas. We are looking at a new software to assist with some of the measures."

With the enormous investment health systems have made in their EHR technology, many organizations are focused on getting more from those efforts. As the COO and Vice President System Operations at a medical center on the East Coast shares, "We are putting a lot of effort and attention into optimizing our current EHR for ease of use for our staff and to improve documentation accuracy for safety and regulatory compliance and improved revenue capture. We are also looking at other opportunities to use technology in order to improve access and decrease labor and other expenses."

The Chief Financial Officer at a 320+ bed health system in the Midwest explains how using acuity data linked to nursing documentation from their EMR is part of their integrated workforce management technology strategy: "We wanted a single source, integrated system that allowed for real time capture of acuity but also allowed for nursing judgment. Our solution integrates time and attendance, staffing and scheduling, and acuity-based patient classification solutions, with an analytics solution that is the glue that connects everything. Now, we use these integrated solutions to determine workload on a shift basis and project staffing based on volume and patient needs on the upcoming shifts. The acuity is based on nurse documentation from the EMR and allows us to see where the patient demand does not match the staffing and skill sets. And, our nurse managers can be proactive in balancing resources and keeping our productivity on budget."

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Standardize policies and processes

Maximizing outcomes is dependent on having an enterprise-wide approach to staffing and workforce management, with standardized process and policies. With consistent labor management approaches implemented across the system, clinical decision teams can compare internally, find best practices and repeat their successes.

As the Director of Productivity and Performance Improvement at a regional medical center in the West explains,

"We knew we needed to define and standardize as much as humanly possible. We had those conversations with all of the stakeholders in the room, looking at best practices and making decisions as a team."

The CNO at a 4500-employee health system in the South shares their approach:

"We recognized that we had flaws in our staffing processes and systems. We lacked a central staffing office and did not have a systematic approach to scheduling and reducing overtime. That was the impetus for starting a high priority Six Sigma project."

The Director of Continuous Improvement at that health system explains further,

"We had lot of data and could see performance gaps. What we needed was a standard, consistent process-driven approach to change the way we do business day after day. We needed to standardize across the organization so that we could reduce variation and close the performance gap. A single approach could create consistent benefits, remove waste and free up capacity for our staff to work on things of more value."

Involve all of the right people

A workforce management strategy impacts every employee within the health system, and there are a lot of stakeholders. It's clear that the people part of the workforce management strategy cannot be overlooked.

Several healthcare executives share their success strategies for achieving shared governance and enterprise-wide engagement:

Collaboration

"We often fail to see the whole picture of this multifaceted process with its many moving parts that intersect with the complexity of nurse staffing. Dialogue, partnership, and strategic planning with a multitude of people and departments, including the CFO, support services, pharmacy and physicians to name just a few, to address the issues of staffing together—that collaboration is what will result in excellent outcomes."

Chief Nursing Officer for large health system in the Midwest

Creating effective care teams

"While the course of healthcare legislation is uncertain, the concept of team is a working model to enhance care delivery. Some things will transition to the outpatient setting while other care routines will remain in the inpatient setting. No matter where the care is delivered, timely intervention by the appropriate care team will make the difference in outcomes."

Vice President at a comprehensive academic health system on the West Coast

Shared governance that includes input from staff nurses

"The nursing division at our health system has a strong shared governance structure for decision making. This is true both house-wide and at service line levels. We have a nursing staffing committee where our staffing, productivity and acuity work is housed. This committee has 85% staff nurses and 15% nursing leadership. The majority of the decisions are made by the staff with input from the leaders. The leaders are able to provide explanations and oftentimes financial data that staff aren't routinely accessing."

Chief Nursing Officer at a 320+ bed health system in the Midwest

Support from the executive team

"It is well known that there is a direct correlation between available workforce and finances, clinical and patient satisfaction, as well as staff engagement. At our health system, we have a leadership commitment to work to continue to identify outcome opportunities as we are responding to changes in reimbursement models. These changes are in turn driving the need to be more thoughtful and creative around workforce optimization, maximizing our own staff, managing overtime, strategically filling in with contract labor, as well as being proactive in addressing staffing concerns."

Regional Executive, Clinical Resources at large non-profit health system in the Northwest

Pulling it all together with patient-centered staffing

Patient-centered staffing is as simple and as complex as having the right nurse with the right patient at the right time. With patient-centered staffing, staffing decisions are based on the unique care needs of each patient. That requires timely, accurate patient, staff and operational data. As the Chief Nursing Officer at a 320+ bed health system in the Midwest explains, "Patient-centered staffing ensures the patient is paired with the nurse best suited to meet his or her treatment needs. With clinical integration, documentation or orders are current and factored into resource matching."

When staffing is aligned with patient needs, balanced outcomes can be achieved. As the System Vice President for Clinical Operations at a 70,000-employee health system in the Midwest shares, "Effective nurse staffing matters to patients, families, and nurses, and it's undeniably linked to improved patient safety, patient and workforce satisfaction, and operational outcomes in healthcare organizations. Innovation in staffing and redesign in structures, people, process, and technology will be crucial to meet future patient and nursing workforce needs. Timely concurrent information and analytics will be vital to move from reactive staffing plans and decision-making to proactive, predictive planning with improved, consistent results."

Conclusion

Everything that happens in a health system happens through the workforce. A health system's workforce management strategy has an enormous impact on enterprise-wide success and sustainability. It can be the difference between simply surviving amidst the chaos of constant change or thriving in spite of ongoing change.

As health systems face increasing demands and new challenges, they must expect more from their workforce management strategies, solutions and vendor partners. A comprehensive, ongoing workforce management strategy should be built on a foundation of timely, accessible data; integrated technology; standardized policies and processes; and shared governance that inspires engagement and collaboration at all levels of the organization.

About symplr

symplr's comprehensive healthcare operations solutions, anchored in governance, risk management, and compliance, enables our enterprise customers to efficiently navigate the unique complexities of integrating critical business operations in healthcare.

For over 30 years, our customers trust our expertise and depend on our provider data management, workforce and talent management, contract management, spend management, access management, and compliance, quality, safety solutions to help drive better operations for better outcomes.

As your trusted guide, we follow a proven approach to help you achieve your organization's priority outcomes by breaking down silos, optimizing processes, and improving operational systems.

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