



# ODP LIFECYCLE (ACCLIMATION) SOLUTIONS STARTER®

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This Solutions Starter provides strategic and tactical ideas to consider when starting an improvement project. The Starter is organized by the standard survey sections and questions of the On-Demand Pulse (ODP) Lifecycle Acclimation Survey. Section definitions were developed in consultation with Press Ganey research scientists. The suggestions are based on literature reviews of industry best practices, top-performer experience, and practical fieldwork.

Solutions Starters support your ability to build an organizational culture and purpose-driven workforce to achieve exceptional patient-centered care. Improvement requires selecting tactics that are aligned with goals and implementing them consistently across your organization. For assistance, please contact your Press Ganey representative or partner with [Press Ganey Strategic Consulting](#) to design and implement a tailored action plan.

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## CONTENTS

|                                     |           |
|-------------------------------------|-----------|
| <b>Job Requirements</b> .....       | <b>4</b>  |
| Section Definition .....            | 5         |
| Voice of the Workforce .....        | 5         |
| Section Items .....                 | 5         |
| Improvements.....                   | 5         |
| <b>Training/Mentoring</b> .....     | <b>6</b>  |
| Section Definition .....            | 7         |
| Voice of the Workforce .....        | 7         |
| Section Items .....                 | 7         |
| Improvements.....                   | 7         |
| <b>Coworkers</b> .....              | <b>9</b>  |
| Section Definition .....            | 10        |
| Voice of the Workforce .....        | 10        |
| Section Items .....                 | 10        |
| Improvements.....                   | 10        |
| <b>Organizational Culture</b> ..... | <b>12</b> |
| Section Definition .....            | 13        |
| Voice of the Workforce .....        | 13        |
| Section Items .....                 | 13        |
| Improvements.....                   | 13        |
| <b>Orientation</b> .....            | <b>14</b> |
| Section Definition .....            | 15        |
| Voice of the Workforce .....        | 15        |
| Section Items .....                 | 15        |
| Improvements.....                   | 15        |
| <b>Job Expectations</b> .....       | <b>16</b> |
| Section Definition .....            | 17        |
| Voice of the Workforce .....        | 17        |
| Section Items .....                 | 17        |
| Improvements.....                   | 17        |
| <b>Job Fit</b> .....                | <b>18</b> |
| Section Definition .....            | 19        |
| Voice of the Workforce .....        | 19        |

|   |           |
|---|-----------|
| Section Items .....                       | 19        |
| Improvements.....                         | 19        |
| <b>Work-Life Balance .....</b>            | <b>20</b> |
| Section Definition .....                  | 21        |
| Voice of the Workforce .....              | 21        |
| Section Items .....                       | 21        |
| Improvements.....                         | 21        |
| <b>Engagement .....</b>                   | <b>22</b> |
| Section Definition .....                  | 23        |
| Voice of the workforce .....              | 23        |
| Section Items .....                       | 23        |
| Improvements.....                         | 23        |
| <b>Appendix: Supporting Tactics .....</b> | <b>25</b> |
| Data Use and Learning .....               | 26        |
| Comment Analytics .....                   | 26        |
| Learning Collaboratives.....              | 27        |
| Strategic Engagement Assessments .....    | 28        |
| Continuous Listening .....                | 31        |
| Process Improvement .....                 | 33        |
| Continuous Process Improvement .....      | 33        |
| Sustainability .....                      | 35        |
| Change Readiness.....                     | 35        |
| Leader Skill Development .....            | 36        |
| Rewards and Recognition Programs .....    | 38        |
| Standards of Behavior .....               | 39        |
| Talent Strategy.....                      | 41        |

## **JOB REQUIREMENTS**

## JOB REQUIREMENTS

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the organization has prepared them for the requirements of their job. This includes such factors as understanding policies and procedures and knowing what is expected of them.

### VOICE OF THE WORKFORCE

- "I love my job and want to do all I'm allowed to do."
- "Just really want clarification in writing as to what I can do and not do as an LPN."

### SECTION ITEMS

- I understand organizational policies and procedures as they relate to my job.
- I know what is expected to me in my job.

### IMPROVEMENTS

- Have candid conversations with your associates about how they feel about the work they do.
- Ask what you can do as a supervisor to either make the employee's work more enjoyable or to help develop them for a different role.
- Determine if there are environmental or process/procedure concerns that you can address.
- Institute leader rounds on staff and ask the following questions:
  - What are we doing well?
  - What are we not doing well?
  - What can we do to improve staff engagement and patient experience?
  - Do you have all the resources you need to do your job?
- **VIDEO:** [Leader Rounds on Staff](#)

## **TRAINING/MENTORING**

## TRAINING/MENTORING

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of the coaching and mentoring processes and training they have received. This includes such factors as receiving feedback and coaching about their job performance; feeling that they have been given the necessary guidance to be successful at the organization; and having a direct manager who has been supportive and respectful.

### VOICE OF THE WORKFORCE

- “I feel that the time being invested in my training and orientation shows how much this company believes in my future here.”
- “The onboarding for direct work had no organization, no policy and procedure manual to follow, no training as to workflow.”

### SECTION ITEMS

- The person I report to has given me feedback or coaching about my job performance.
- I have been given the necessary guidance to become a successful employee at this organization.
- The person I report to has been supportive during my onboarding.
- The person I report to treats me with respect.

### IMPROVEMENTS

- Identify opportunities to provide feedback, both positive and constructive.
- When providing critical feedback, deliver constructive criticism that is actionable and will lead to improvement, rather than just letting the other person know the result was less than optimal. Suggestions or discussions about how to improve next time will make the feedback more effective.
- After feedback is given, make sure to follow up and note improvements or continued areas of focus.
- Have ongoing performance discussions with your associates. Ask them how everything is going and if they have any concerns. Tell associates what they are doing correctly and what they need to improve upon.
- Schedule a meeting after three months of employment and ask the following questions:
  - How's it going? How do you feel in your new job?
  - What are you enjoying most about your role?
  - Is the job/team/organization what you expected?
  - Has anything surprised you? If so, what?
  - Has training been helpful? What would you add or change?
  - Do you have all the tools and resources that you need?
  - Do you feel like you have gotten to know your coworkers well?

- Do you feel out of the loop about anything?
- What should we provide to new employees that we have missed?
- What is working/what is not working?
- Is anything about your role, the team or organization still unclear?
- How can I be a better manager to you?
- As your manager, what can I do to continue to make your transition easier?
- Meet with your new hire to review the onboarding roadmap that outlines the specific timeline, goals, responsibilities, and support available to them.
  - Spell out the “what” and “when,” in addition to the assistance they can expect.
  - Ask what else you can do to ensure they continue to be successful in their role.
- Read and post positive letters from patients and point out any employees that are named in those letters.
- Reserve time at the end of all staff meetings to recognize the performance of direct reports and to allow employees to recognize their peers for outstanding performance.
- **VIDEO:** [Recognizing Excellence](#)



## **COWORKERS**

## COWORKERS

### SECTION DEFINITION

The survey items in this section measure an employee's opinion of the people they work alongside. This includes such factors as feeling welcomed and being valued, as well as the level of quality care and teamwork demonstrated by their coworkers.

### VOICE OF THE WORKFORCE

- “The immense support from my fellow co-workers has been great.”
- “Other staff have a very negative attitude which makes it difficult to come to work each day and enjoy the job.”

### SECTION ITEMS

- My new coworkers made me feel welcome to the organization.
- I am treated as a valued member of my work unit.
- My coworkers demonstrate high-quality care/service.
- My coworkers and I work well together as a team.

### IMPROVEMENTS

- Assign an appropriate mentor to hold weekly mentoring meetings with the new hire for their first 90 days. The mentor should:
  - Introduce the new hire to colleagues
  - Demonstrate the culture
  - Schedule weekly 1:1 lunch meetings with colleagues and stakeholders to help the new hire to build rapport and relationships
- Face time is critical in the welcome phase. Use several methods to communicate with your new hire beyond just email (e.g., staff meetings, 1:1 meetings, bulletin boards, lunches).
- Ensure your new hire feels that they are an important part of the workgroup.
- Be highly engaged with your new hire by providing regular contact, feedback, coaching, and praise.
- Consider providing a welcome gift to your new hire each week (e.g., coffee mug, t-shirt, pen, planner) throughout the onboarding process.
- Keep the organization's mission and values top-of-mind with your new hire. Share stories about model employees. Talk with them about how they have and/or can make similar contributions.
- Identify and discuss patient experience successes and opportunities. Ask employees for examples during team meetings and pursue suggestions made for achieving high quality care/service.
- Invite a member from various patient-facing departments to your staff meeting to share patient stories and/or data. Focus the conversation on the positive and the negative (e.g.,

successes, complaints, satisfaction and dissatisfaction). Review how your workgroup directly or indirectly contributes to positive patient experiences and develop measurable actions to implement to improve patient experience.

- Follow a communicate-to-celebrate process:
  1. Communicate the performance goals that were set for the entire team.
  2. Identify how they can work together to achieve the goals.
  3. Routinely update them on progress against the goals.
  4. Regularly celebrate success.
- Brainstorm a list of effective teamwork behaviors with your team. Agree upon the behaviors that will have the most positive impact. Monitor and reinforce appropriate behaviors via staff meetings and 1:1 performance discussions.
- **VIDEO:** [Peer Accountability and Culture Change](#)

## **ORGANIZATIONAL CULTURE**

## ORGANIZATIONAL CULTURE

### SECTION DEFINITION

The survey items in this section measure an employee's connection to the organization's mission. This includes such factors as being able to explain the mission to others and understanding how their job contributes to the mission.

### VOICE OF THE WORKFORCE

- “The staff and volunteers and my supervisor have been fantastic, and I love the culture and work environment at the hospital.”
- “The politics of the workplace are much more intense than I would have expected.”

### SECTION ITEMS

- I can explain this organization's mission to others.
- I thoroughly understand how my job contributes to this organization's mission.

### IMPROVEMENTS

- Communicate the mission, vision, and core values, even before individuals are hired and continue to do so after they start.
- Schedule a meeting for senior leaders to deliver the organization's mission and goals to new hires. Encourage a Q&A session. After the meeting, meet one-on-one with your new hire to review the strategic plan and how the department's goals and objectives contribute to the organization's mission and goals.
- Regularly communicate an overview of the role, department, and organization. This will help your new hire understand the purpose of the role; type of work, and initiatives they will be engaged in—as well as the overall goals to accomplish.
- Using their job description as the map, walk your new hire through how their role fits into the overall mission and goals of the organization, and why their contributions are important.
- **VIDEO:** [Share the Why](#)

## **ORIENTATION**

## ORIENTATION

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the organization conducted new hire orientation. This includes such factors as if the employee's job and experiences with the organization are consistent with what was presented during orientation.

### VOICE OF THE WORKFORCE

- “My orientation was excellent, providing me with the tools I need to succeed.”
- “This is quite honestly the worst experience I’ve had in an onboarding process.”

### SECTION ITEMS

- The reality of my job is consistent with what was presented to me during orientation.
- My experiences with the organization are consistent with what was presented to me during orientation.

### IMPROVEMENTS

- Have a check-in with your new hire around the 90-day employment date.
  1. Review what you both agreed success looked like in the role, including key performance indicators.
  2. Ask if the job is what they expected and what additional challenges they would like to engage in moving forward.
  3. Provide specific feedback on their performance on the objective (key performance indicators) and subjective (communication, interaction, emotional intelligence) performance measures you and the organization provide.
- Discuss with your direct report their performance on the goals and objectives that were outlined during their first week on the job. Provide specific, actionable feedback that will allow them to continue to maximize their strengths and take action on their development needs.
- In the spirit of continuous improvement, ask employees what they thought of the onboarding process and whether they have recommendations for improvement—not only immediately after the training, but also once they’ve been in the role.

## **JOB EXPECTATIONS**



## JOB EXPECTATIONS

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of how their job met the expectations that were set during the hiring process. This includes such factors as how well the job was explained, the accuracy of the job description, and whether the workload is consistent with expectations.

### VOICE OF THE WORKFORCE

- “I think my job has been pretty consistent with my expectations.”
- “The expectations change consistently with little to no communication as to what the new protocols or expectations are.”

### SECTION ITEMS

- My experience in this job is consistent with how the job was explained to me during the hiring process.
- During the hiring process, I was provided with an accurate description of the work I would be doing in this role.
- The amount of work I have been given is consistent with my expectations per the job description.

### IMPROVEMENTS

- Clearly define the skills, knowledge, and behaviors (competencies) of successful performance for the role and include this in the job description shared with the candidate. Share again when they start.
- On a regular basis, communicate an overview of the role, department, and organization to ensure understanding of the role's purpose; type of work and initiatives they will be engaged in; and overall goals to accomplish.
- Ensure new hires are assigned tasks and held accountable while they acclimate to the culture of the organization and their new role.
- Around the 90-day employment mark, ask your new hire if their workload is consistent with their expectations and what new challenges they would like to explore in their role.
- At the 90-day employment mark, review your new hire's job description and workload in detail. Allow your new hire to play back how they view it. Discuss how their success has been measured to date and what you can do to contribute to this moving forward.

## **JOB FIT**

## JOB FIT

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of job fit. This includes such factors as how well the job suits their skills and abilities and how well the employee likes the work they are doing.

### VOICE OF THE WORKFORCE

- "I love taking care of patients. I love that I am a part of a person's healing process!"
- "Things that were promised when hired have not been consistent with the training and ratios that have been given."

### SECTION ITEMS

- I like the work I do.
- My job makes good use of my skills and abilities.

### IMPROVEMENTS

- Meet with your direct report and ask them what they like about their role and what engages them in the workplace. Obtain specific details.
- Ask your new hire one thing they would change about their work and partner with them to determine how to continue to improve their work experience.
- Be a champion for your team's career development. Provide input on their career development plans. For example:
  - Ensure plans include specific action steps
  - Align individual development with the needs of the organization
  - Help them gain new experiences (e.g., project management) that align with their goals
- Ensure team members understand that their development is their responsibility. They own the process.
- Meet with your new hire around their 90-day employment anniversary and review the skills and abilities they shared with you at the 30-day anniversary. Ask them if their work continues to incorporate their skills and abilities into their duties and what additional work they would like to take on to leverage their skills.
- Hold 1:1 meetings with your new hire on a regular basis. Provide quality feedback regarding their contributions to the team and organization. Discuss career goals and ensure they are aware of resources for development such as projects, workshops, e-learning classes, and tuition reimbursement benefits.

## **WORK-LIFE BALANCE**

## WORK-LIFE BALANCE

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of their work-life balance. This includes such factors as their schedule and workload.

### VOICE OF THE WORKFORCE

- “I love the flex schedule so I can balance work and life.”
- “Needing something with more of a set schedule due to childcare times.”

### SECTION ITEMS

- My work schedule meets my needs.
- My workload is comparable to my expectations when I took this job.
- My workload allows me to have an appropriate work-life balance.

### IMPROVEMENTS

- Meet with your new hire around their 90-day employment and review the work schedule that was established in month one. Discuss the need for any changes to the schedule and agree on an updated work schedule moving forward.
- Discuss any workload concerns your new hire may have. Devise a plan with the team to develop efficient work procedures and solutions. Create a list of key actions with metrics and then keep employees up to date on the progress that is made.
- Discuss work-life balance and encourage your new hire to talk to you about these issues. Communicate the organization's policies (e.g., time off, flextime) regarding work-life balance issues and reiterate your support of these policies.
- Do everything you can to support work-family balance. Reassess the flexibility for time off and the amount of work required of employees.
- Ask your team, including your new hire, for their ideas on improving productivity and workflow. Engage them in a problem-solving process that focuses on creating solutions.
- Understand what motivates employees of different roles, shifts, generations, tenure, etc. This will help managers and leaders develop programs that address the variety of what employees need to feel activated in their roles, and also to be able to decompress when needed.
- Ensure employees understand how they are making a meaningful contribution to patients, to their colleagues, and to the organization. Doing so helps cultivate resilience and the ability to persevere in a challenging health care environment.
- **VIDEO:** [Building Nurse Resilience](#)

## ENGAGEMENT

## ENGAGEMENT

### SECTION DEFINITION

The survey items in this section serve as an indicator of the respondent's self-reported level of Engagement using key outcome questions. This includes such factors as feeling a sense of pride to work for the organization, being willing to recommend the organization as a good place to work and receive care, feeling a sense of belonging, and expecting to remain as an employee with the organization for a long time.

### VOICE OF THE WORKFORCE

- “I like the environment. It has been a great working experience and a good insight to things about health care I never knew.”
- “I really expected to work in an office and become part of a family so to speak and was met with a cold atmosphere full of stress. Not very conducive for working environment.”

### SECTION ITEMS

An effective engagement strategy targets the drivers of engagement, rather than engagement as a global metric. To achieve positive employee engagement, it is important to work on drivers such as job fit, communication, career development, etc. Focusing improvement efforts on the drivers of engagement will lead to increased overall engagement.

The recommendations in the “Improvements” section to follow can inform action plans on the aspects of new hire engagement listed below:

- Overall, I am satisfied working here so far.
- I am proud to tell people that I work for this organization.
- I would recommend this organization to family and friends who need care.
- Based on my experiences so far, I would recommend this organization as a good place to work.
- I expect to remain an employee at this organization for a long time.
- I would stay with this organization if offered a similar job elsewhere.
- I feel like I belong in this organization.

### IMPROVEMENTS

- Schedule a Q&A session where senior leaders talk about the organization and why it is a great place to work. Encourage questions by asking your direct report to generate three questions prior to the meeting.
- Share the organization's strategy, five-year plan, and vision for your location on a regular basis.
- Empower your employees by increasing their involvement in decision-making—individually or as a group—during staff meetings.

- Meet with your new hire to identify their core strengths, career aspirations, and where they see their career each year for the next three years.
- To increase long-term engagement, implement job rotations and/or cross-training opportunities for employees to learn new skills and explore new potential roles within the organization.
- Share the vision, mission, and goals of the organization with enthusiasm. Include specific success/impact stories and detail the organization's uniqueness. Identify how the culture supports employees.
- **VIDEO:** [Using Comments to Tell a Story](#)



## **APPENDIX: SUPPORTING TACTICS**

## DATA USE AND LEARNING

### Comment Analytics

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Comment analytics leverages Natural Language Processing to assess and review open-ended survey items. The technology will group similar themes and concepts together to provide leaders with an overall frequency report to better assess workforce engagement and important elements of culture.

**Use comment analytics to gain a deeper understanding of employee perceptions and observations of culture, teamwork, and care delivery.**

- Comment analytics:
  - Quantifies and analyzes qualitative data for action.
  - Enables identification of emerging trends and root causes.
  - Uses sentiment analysis to represent the emotional tone in the comment text.
- Thematic and visual organization of comment responses and sentiments enable deep dives into certain themes and concepts.
- For example, a leader can isolate and display comments related to decompression or activation and then discern positive from negative sentiments to uncover inconsistencies in perspectives and opinion.
- Quantitative analysis of qualitative data provides information on:
  - **Topics:** What is being said?
  - **Volume:** Topic frequency
  - **Sentiment Volume:** Is the comment positive or negative?
  - **Sentiment Strength:** How positive or negative is the comment?

## Learning Collaboratives

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Learning Collaboratives expand on the concept of cross-functional improvement teams. The educational process engages health care professionals to learn about successful practices from each other within the same organization or in broad collaboration with other organizations and services within the community.

Learning Collaboratives engage the people doing the work in process and quality improvement. Adult learners can be energized by learning from those like them and contributing to institutional knowledge.

Identifying and promoting internal best practices is the most efficient approach to system-wide improvement. Sustainable employee engagement success is dependent on local continuous improvement organized around the specific needs of employees. Learning Collaboratives provide an opportunity for managers and leaders throughout a health care system to learn from each other, and to spread employee engagement best practices system wide.

### **Create a forum for sharing lessons learned from successful and unsuccessful efforts.**

- Schedule time for formal, routine collaboration across departments and locations.
- Engage cross-functional improvement teams from across the enterprise. To be truly cross-functional, there must be representation from managers and leaders across the organization.

### **Use a system improvement model to standardize language and accelerate adoption.**

- Obtain executive leadership buy-in.
- Identify management champions.
- Define the purpose, goals, roles, and responsibilities.
- Routinely discuss the collaborative's efforts at standing meetings.
- Embrace high-reliability principles and commit to continuous process improvement.

### **Include participation in Learning Collaboratives in job descriptions.**

- Provide incentives for participation.
- Recognize managers for contributing knowledge gains – both through success and failure.

### **Codify innovation into a replicable improvement approach.**

- Document improvement efforts and processes from the identification of an improvement need through follow-up and monitoring.
- Draft procedures to capture and reapply successful process improvement efforts.
- Recognize and reward innovation and the adoption of evidence-based strategies.

## Strategic Engagement Assessments

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Routine assessment of employee engagement, nursing excellence, physician engagement and alignment, resilience, diversity, well-being, and safety culture provide a straightforward and consistent process for interpreting data, identifying strengths and concerns, setting priorities for improvement, and measuring progress.

**Note:** Many of these engagement survey initiatives (i.e., nursing excellence, resilience, and safety culture) can be streamlined into one single survey administration to avoid survey fatigue and increase response rates.

### **Assess employee engagement.**

- An engaged workforce drives sustainable excellence. Individuals who feel connected to the mission and vision of the organization, supported by their managers, and appreciated by their colleagues tend to be more engaged than those who lack such attachments.
- Because every element of the care experience is delivered to the patient through the workforce, investing in building an engaged, high-performing workforce is crucial to the delivery of high-caliber care and facilitates optimizing other key performance metrics across experience, quality, and finance.
- Engagement data identifies targets for investment and improvement that resonate across patient experience, workforce, safety, operational, and clinical outcomes.
- Ensuring employees' needs are met is foundational to establishing a culture of engagement.
- It is important to have a clear understanding of key drivers that impact employees' work environment (e.g., relationships with managers, access to tools and resources, and opportunities for personal development).
- Use a comprehensive, continuous approach to collecting and acting upon employee culture and engagement data. The measurement tool should have a firm theoretical and empirical basis.
- Results of any employee engagement analysis should capture:
  - An outcome-based engagement metric
  - A work-unit segmentation metric identifying which units need the most intervention
  - A management metric that identifies which managers need assistance or coaching in order to effectively drive improvement for their teams

### **Assess nursing excellence.**

- Nurse retention is top of mind as organizations seek to maintain institutional knowledge, ensure consistency in care delivery, and promote patient experience and loyalty.
- Nurse disengagement can be costly for an organization because of its impact on nursing turnover, patient safety, and patient experience.

- Including nursing-specific measures on the employee engagement survey can help organizations drive nurse engagement, improve performance, and facilitate the Magnet Recognition Program® application process.
- Insights gathered from the segmentation of RN scores can have implications not just for nurse engagement and retention, but also for interventions to drive safety, patient experience, and reputation.

### **Assess physician engagement and alignment.**

- Strong physician engagement and alignment can lead to better patient experiences and quality of patient care. Conversely, when physicians leave, become disengaged, or are not aligned with the organization's mission, vision, and values, the impact can be felt throughout the care delivery process.
  - Engagement measures physicians' appraisal of their work environment, emotional experiences, and attachment to the workplace.
    - A highly engaged physician may be content with day-to-day, patient-facing activities, but resisting organizational change and preventing his department from attaining key goals. This describes an engaged physician who is not aligned with his organization.
  - Alignment measures the extent to which a physician feels a strong partnership or connection with the organization's leadership.
- By measuring both engagement and alignment, organizations gain insight into if your physicians are likely to stay, as well as if they will support your strategic initiatives. Organizations that meaningfully engage and collaborate with physicians and physician leadership are on the most direct path to deliver exceptional patient experiences and outcomes.

### **Assess resilience.**

- Resilience metrics can act as an early warning sign for teams that are at risk of burnout.
- Resilience scores assist organizations in determining which groups may need support both at and away from work.
- Resilience is comprised of two major components: activation and decompression.
  - Activation is centered on the ability to connect one's work with meaning and a sense of purpose, and the ability to treat patients as individuals.
  - Decompression is centered on the ability to disconnect—to free one's mind from work stresses and enjoy personal time.
- To minimize burnout and build caregiver resilience, identify sources of avoidable stress and distress by ensuring the workforce has the resources and support needed to deliver the safest, highest quality care.

### **Assess diversity.**

- As health care leaders strive to improve employee engagement, many organizations are expanding their efforts to foster diverse and inclusive work environments.

- Each organization is different; there are variations regarding which employees may face marginalization in the workforce and how this would manifest.
- Conducting an overall assessment of diversity-based issues gives a general understanding of how much of an impact an employee's background has on their daily work lives.
- It is important to understand diversity-related organization, manager, and employee dynamics such as:
  - This organization values employees from different backgrounds
  - This organization demonstrates a commitment to workplace diversity
  - All employees have an equal opportunity for promotion regardless of their background
  - My coworkers value individuals with different backgrounds
  - The person I report to treats all employees equally regardless of their background
  - Administration of diversity-based measures over time can identify emerging patterns of marginalization that may warrant action.

**Assess well-being.**

- Many organizations have started to focus on assessing employee and provider health and wellness from the more holistic standpoint of overall well-being.
- At a high level, this overarching concept of well-being includes multiple facets of an individual's life: emotional and physical health, social support and personal connections, financial security, and occupational fulfillment.
- Individuals who rate high on well-being are thought to be more engaged in their work, demonstrate more commitment to organizations that support them, are more resistant to burnout, and have the personal tools necessary to cope with being involved in medical errors, adverse events, or other traumatic experiences that personally impact members of the healthcare industry.
- Individual-level well-being measures can be used to gauge the impact of other workplace dynamics, such as organizational culture, leadership changes, external events, etc., on high-level measures of the overall quality of life of employees. Taken together, these components reflect a state of being that is beyond both engagement and traditional approaches of employee wellness.

**Assess safety culture.**

- Organizations are best positioned to develop a high-performing workforce when they build a culture of safety and adopt safe processes.
- To align the organization around a mission to achieve Zero Harm, one of the first steps is to assess care provider feedback, attitudes, and perceptions related to patient safety.
- Direct feedback from those responsible for delivering care informs the level of organizational focus needed to make safety a top priority across the organization.
- Assessing safety culture at the organization and work unit levels supports awareness around patient safety issues, identifies strengths and concerns, and evaluates the impact of patient safety interventions and performance over time.

## Continuous Listening

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In this challenging environment, the risk of caregiver burnout and turnover continues to threaten morale, retention, and profitability. Giving a voice to caregivers through purposeful and continuous listening empowers people leaders to mitigate these risks in real time, demonstrates respect for the workforce, and creates an environment of trust. Monitor workforce trends using culture and engagement surveys, stay and exit interviews, lifecycle and pulse surveys. Use the information to identify areas to target improvement efforts.

### **Conduct annual safety culture and engagement surveys.**

- Have senior leaders promote participation and explain why the surveys are conducted and how the results will be used.
- Use the results to inform engagement and culture improvement strategies based on workforce readiness for change, leadership development opportunities, and coaching and readiness planning for leaders and teams with low engagement.
- Include measures of burnout and address resilience if results indicate high risk.
- Be transparent about results. Share the findings with all providers and employees.

### **Conduct Stay Interviews.**

- Stay Interviews are structured, one-on-one discussions led by a manager or other leader to learn ways to strengthen an employee's engagement and retention and to build trust.
- These should be held separately from annual reviews with a sole focus on what leadership can do for the employee or provider.
- There are several key questions for conducting a Stay Interview. Each question has additional probing questions to get the most out of the employee's feedback.
  1. What do you look forward to about your work?
    - Give me an example.
    - Tell me more about...
    - Who do you look forward to working with the most?
  2. What are you learning here, and what do you want to learn?
    - Which other jobs here look attractive to you?
    - What skills do you think are required for those jobs?
    - What skills would you have to build to attain your goals?
  3. Why do you stay here?
    - Tell me more about why that is so important to you.
    - Is that the only reason you stay, or are there others?
    - If you narrowed your reasons to stay to just one, what would it be?
  4. When was the last time you thought about leaving us, and what prompted it?
    - Tell me more about how that happened. Who said what?
    - What's the single best thing I can do to make that better for you?
    - How important is that to you now on a 1-10 scale?

5. What can I do to make your job better for you?
  - Do I tell you when you do something well?
  - Do I say and do things to help you do your job better?
  - What are three ways I can be a better manager for you?

**Conduct Exit Interviews.**

- Although Exit Interviews do not improve the retention of that employee, they inform opportunities to improve, including improvements in how engaged and valued employees feel.
- Explain that the purpose of the interview is to help the organization improve its processes and retain its valuable employees.
- Encourage employees to share the reasons why they are leaving. There are controllable reasons employers can address with improvement initiatives: insufficient training, no opportunity for advancement, feeling underappreciated, unfair treatment, or inappropriate distribution of tasks.
- Ask how the organization could be a better place to work.

**Conduct Lifecycle Surveys.**

- **Entrance surveys** provide a review of the job selection and hiring processes. Ideally, these surveys are administered within the first seven days of employment.
- **Onboarding surveys** provide data about how the experience of new employees changes over time. Research shows proper onboarding leads to more motivated and effective employees.
- **Exit surveys** focus on obtaining specific information about why individuals are leaving the organization. Ideally, data are used in tandem with qualitative information gathered via live and dynamic exit interviews.

**Conduct Pulse Surveys.**

- Complement in-depth culture assessments with real-time continuous measurement to understand the unique stressors that impact nurses, physicians, and employees. Doing so provides insights for building an engaged, resilient workforce.
- Ideal for gauging progress to goal on a defined action area.
- Target a smaller subset of units or a specific demographic group rather than surveying the entire organization.
- Create shorter surveys focused on a specific topic of interest.
- Gain a deeper understanding of key factors emerging from an annual culture assessment.



## PROCESS IMPROVEMENT

### Continuous Process Improvement

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Continuous Process Improvement (CPI) is the ongoing effort to improve services by increasing the quality of those services or by reducing unnecessary or redundant steps. It supports both patient-centricity and employee engagement.

- It reflects a high level of interest in meeting patient needs and for providing a work environment that improves the delivery of compassionate, patient-centric care.
- Employees who experience the inherent rewards of directly or indirectly reducing patient suffering can take pride that their work is meaningful.

CPI is the core principle behind every structured improvement model, such as the commonly recognized Lean, Six Sigma, Kaizen, and Robust Process Improvement models. It involves the adoption of a structured process for ongoing assessment and improvement.

Care delivery is incredibly dynamic. Science, technology, equipment, personnel, and patient needs are constantly changing. Even organizations with high levels of performance across all metrics can only be sure of performance excellence through ongoing monitoring—a key component for continuous improvement. In fact, to become a high-reliability organization, you must develop a preoccupation with failure and conduct routine and ongoing self-assessment.

Everyone has room for improvement. Engaging in CPI indicates there is a formal program for routine self-assessment, and there are dedicated resources to identify areas of under-performance and to implement improvement plans. CPI processes allow an organization to identify low quality or care problems before safety events or harm can occur.

#### **Adopt a formal, proven method for continuous improvement, such as (in alphabetical order):**

- Kaizen
- Lean
- Robust Process Improvement
- Six Sigma

#### **Implement continuous improvement across all locations in a system.**

- This supports the Learning Collaborative approach for standardizing best practices.

#### **Include all stages of a continuous improvement approach.**

- Collect data to assess the quality of the patient experience and workforce experience.
- **VIDEO:** [Elements of a Data Strategy](#)
- **VIDEO:** [Selecting a Key Performance Indicator](#)
- **VIDEO:** [Identify Barriers to Success](#)

**Include metrics reflecting the mission and values statements in a balanced scorecard for routine executive review.**

- **VIDEO:** [Set the Right Goals](#)
- An improvement strategy is part of a broader data strategy and must align with organizational goals.
- Select a key performance indicator (KPI) that reflects organizational goals for the workforce experience.
- Set goals that directly improve the KPI.
- Set goals based on their unique performance.
- Identify key drivers and leading indicators reflecting the process or behavioral changes being targeted, and track performance on those indicators with routine board-level reviews.
- Routinely review data trends with executive leaders and board members.

**Identify areas of low or poor performance.**

- Conduct root cause analyses to identify the underlying process or human factors.
- Focus your efforts on two or three priority initiatives.
- **VIDEO:** [Focus Your Efforts](#)

**Adopt a High Reliability operating system.**

- Focus on the process failures and aim to build processes that overcome the tendency for human error.
- Employ cross-functional improvement teams with representation from physicians, other practitioners, nurses, reception, billing, technicians, human resources, and other staff.
- Define action plans with roles, responsibilities, and deadlines.
- Identify outcome measures for continuous tracking to assess the success and sustainability of the improvement plan.

**Address obstacles and standardize best practices across the enterprise.**

- Take a closer look at the obstacles impeding improvement and identify ways to eradicate or get around them.
- CPI is part of an overall data strategy. In addition to identifying and improving on areas of underperformance, it informs the identification of existing best practices.
- Standardize the adoption of best practices within a facility and system wide.

## SUSTAINABILITY

### Change Readiness

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Improvement planning is often the first step in the process of driving change. It includes reviewing engagement data, selecting specific metrics of focus, setting achievement goals, and implementing strategies for reaching those goals and improving performance on the chosen metrics. Assessing change readiness improves understanding of the organizational context driving readiness for change.

#### **Address change readiness issues.**

- Ask questions such as:
  - Are senior leaders prepared to invest their time and energy in this effort on an ongoing basis?
  - Is the broader management team capable of understanding the value of improving culture, and do they have the associated skill set to execute and sustain cultural initiatives?
  - Are dedicated resources available to manage change, either within the organization or through external consultants?
  - What is the past experience of the organization with implementing large-scale change, and how may those previous experiences impact this initiative?
  - Is there a communications group charged with a communication strategy around change?
  - What listening methods does the organization have (e.g., leadership rounds, town halls)? How is feedback obtained from the front lines?
  - How is change assessed at the organization? What does success look like, and how is it measured?
  - Who is responsible for sustaining change?

## Leader Skill Development

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Managers are the organizational leaders responsible for empowering their employees, coaching for success, setting clear goals, recognizing achievements, communicating with transparency, listening carefully, providing constructive feedback, and helping employees to feel valued. They are essential to the health of the culture and the success of the organization.

It is important to properly enable these leaders to understand their team's culture/current functioning and their role in creating/reinforcing that culture. It is also essential to provide them with the necessary education and coaching to improve their skills and shape a culture that supports their goals.

### **Support managers in developing effective management skills.**

- Many new managers are promoted based upon technical expertise, but this alone will not enable their success in this new and different role.
- Is the broader management team capable of understanding the value of improving culture, and do they have the associated skill set to execute and sustain cultural initiatives?
- It is critical that new managers are educated and supported with new manager training on basic skills (e.g., delegation, communication, teamwork, coaching, meeting management).
- In addition to targeted 1:1 coaching, cohorts of managers may be identified for training on specific management skills or leadership competencies. These groups can be monitored for progress that can be attributed, at least in part, to the training investment.

### **Prepare managers for success with a defined set of competencies.**

- Consider the following questions:
  - How do you prepare your future leaders (and new leaders) for success?
  - Do you have a defined set of essential leader skills and competencies that leaders are trained on and coached to?
  - Are you proactive in supporting new leaders, or do they only get support when they start failing?
  - Do you see signs of burnout among new leaders (high activation/low decompression)?
  - Is your leadership team consistent in their level of competency in key leader skills that are essential to the business?

### **Establish Leadership Development Institutes.**

- Best practice organizations regularly bring their leaders together for group learning and networking in sessions, commonly known as Leader Development Institutes (LDIs).
- LDI sessions provide leaders with the opportunity to:
  - Hear a unified message from their executive leadership.
  - Receive ongoing leadership skill refinement in areas like leading change, coaching skills, and emotional intelligence, etc.

- Learn from one another's challenges and successes. This strengthens the collective knowledge base and increases the cohesiveness of the leadership team.

## Rewards and Recognition Programs

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Rewards and recognition programs are structured systems that provide incentives to employees to meet or exceed behavioral standards. Rewards are typically monetary in nature, whereas recognition generally provides a psychological or emotional lift. They are often combined into one program, but the two components meet different needs and are addressed in different ways.

Caregivers experience a steady stream of stressors and rewards. When stress compounds unmitigated, it takes a toll on wellness, leaving them emotionally exhausted and struggling to find a sense of meaning and accomplishment. This leads to burnout, which is highly prevalent among caregivers and poses a significant threat to safe, high-quality patient care. Rewards and recognition programs help ensure the stressors are balanced with a sense of value and purpose.

Rewards and recognition programs are crucial for strong safety cultures and a highly engaged workforce. Amplifying the rewards of the work and creating opportunities for interaction through celebration can improve collegiality and enhance resilience.

Rewards and recognition programs should be developed and managed by a cross-functional team comprised of nurses, physicians, nonclinical operational leaders, human resources, organizational development personnel, and marketing and communications professionals.

### **Align rewards and recognition with the facility's mission, vision, and values.**

- Connect recognition and incentives to expected behaviors.
- Leverage patient comments for individual and team success stories.
- Write notes to employees identified in the survey comments.
- Share positive feedback during daily huddles, department meetings, and leader rounds.
- Publish positive comments in newsletters, intranet communications, and on bulletin boards dedicated to a recognition process.
- Make recognition personal, specific, meaningful, and timely.
- Publicly acknowledge accomplishments, including innovation.
- Engage the team in peer recognition, such as a nomination process for awards or daily huddle kudos.
- Include notes in staff members' personnel files so they may be formally recognized during the performance review process.
- Celebrate with food and fun.
- **VIDEO:** [Recognizing Excellence](#)

## Standards of Behavior

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Culture is shaped by how the providers and staff behave toward patients and colleagues across the organization. The resulting environment influences patient, workforce, and operational outcomes—including safety, quality, and patient experience. Formally drafted behavior and service standards set the tone for culture and are essential to upholding accountability.

For example, without standards of behavior, it is possible for unhealthy interpersonal dynamics to develop within teams (e.g., competitiveness, large authority gradients, bullying). When these concerns are not addressed, both employee engagement and patient experience will suffer. We will see a lack of focus (i.e., if we are in “survival or “self-protection” mode we are not focused on the patient, nor are we likely to be fully situationally aware), less stability (i.e., more absenteeism and turnover), and more disruption (i.e., employee relations issues and manager time focused on problem solving rather than being future-focused).

### **Establish clear behavior expectations.**

- Align all standards of behavior with the organization’s mission, vision, and values statements.
- All standards must be accessible and understandable by all staff.
- Behavior standards should be universal across the enterprise.
- Include service expectations for phone, email, text, and in-person communication.
- Include behavioral expectations for attending daily huddles, speaking up for safety, and reporting safety events (including near misses).
- Include behavioral expectations for professional courtesy and staff interactions.
- A clear set of manager expectations must exist to ensure consistent training, monitoring, and accountability for standards—especially relative to staff management and discipline, and communication.
- **VIDEO:** [Set Specific Behavior Standards](#)

### **Train employees and providers.**

- Set the tone for the importance of service in new employee orientation. Help new employees understand the importance service holds in your organization.
- Conduct Service Behavior Training on a regular basis. Refer staff who are not upholding service standards for additional training.
- Develop a formal training program:
  - Apply a project management process to communicate action items, responsibilities, and deadlines, and to track progress.
  - Define trainer criteria and identify trainers.
  - Train the trainers.
  - Design interdisciplinary learning sessions.
    - Include attendees from various departments and disciplines at each training, such as physicians, care providers, nurses, medical assistants, registrars, schedulers, and billing.

- Set a schedule of training offerings to ensure everyone can attend both modules. Create a calendar.
- Track attendance.
- Embed training in orientations for new employees and in leadership training.
- Have senior leaders initiate trainings with a 15-minute presentation about the purpose, including why service behaviors matter for our patients and colleagues.
- Develop a communication plan to distribute the message about the training and its purpose (who, what, when, where, and why) enterprise wide using all mediums for communication at your disposal.
- Involve marketing to develop materials that will build enthusiasm for the effort.
- Provide mandatory annual courses.
- Assess the effectiveness of the training. Can front-line employees describe the organization's behavior standards and why they are important?
- Promote the standards on an ongoing basis.
- Mention behavioral expectations during daily huddles.
- Use multiple modes of communication to share reminders and prompts (e.g., intranet posts and newsletters).
- **VIDEO:** [Communicate the Why](#)
- **VIDEO:** [Model Expected Behaviors](#)

**Hold everyone accountable for behavior and service standards.**

- Build expectations into job descriptions and annual reviews
- Recognize and reward service excellence.
- Discuss service behaviors during leader rounds on staff.
- Conduct observations and discuss findings. Create an observation checklist.
- Provide service behavior reminders in follow-up communications (e.g., in newsletters and intranet posts).
- Measure provider and employee compliance.
- Include an evaluation of behavior and service standards in provider and employee annual performance reviews.
- Use an Appreciative Inquiry approach—empower staff to identify successful solutions to known issues.
- Present service standards as guidelines to achieve desired outcomes for each patient. This makes the connection between standards and the mission of health care.
- Immediately address any concerns about bullying, rudeness, or unprofessional behavior that may undermine how well employees work together.



## Talent Strategy

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The following key touchpoints for intervention in the talent lifecycle are most relevant to the work of driving toward and sustaining a culture of safety, quality, patient-centricity, and employee engagement. The elements below are interrelated and should be addressed concurrently as part of the overall talent management strategic plan.

### **Attract talent.**

- Ask questions such as:
  - What is the current view of the organization in the labor market? How do we compare to our competitors in the eyes of potential candidates? How are we monitoring this?
  - What efforts are we making to define and create our narrative as an employer that is aligned with our mission, identity, and patient promise?
  - What is the recruiting experience like for potential candidates? How do they find us, or how do we find them? What does that first touchpoint feel like and what does it say about us?

### **Select talent.**

- Ask questions such as:
  - Beyond “fit,” or an ability to fill the minimum requirements of the role, what are the non-negotiables that will ensure we select those that align with our vision for safe, high-quality, patient-centered care?
  - Have we defined the “candidate experience” and what we want that to be/feel like?
  - How are we building engagement during the selection process? Are we using messaging, mentors, and making connections to our senior leadership, coworkers, and culture?

### **Orient talent.**

- Ask questions such as:
  - What is the content of the orientation? Is it focused on true cultural onboarding, or policy and form submission?
  - How would a newly oriented employee describe the “vibe” of the day (e.g., interactive and engaging, long and tedious, confusing)? How would you want them to describe it?
  - Is there a formal orientation for work-units that includes essential engagement elements of welcoming, valuing the person, and building connections and identity? How are leaders supported in making this happen in their departments? How do we evaluate the quality of the unit-level orientation experience?

### **Engage talent.**

- Ask questions such as:
  - What touchpoints exist with new hires after the orientation?

- How is the safety, quality, patient experience narrative woven into the touchpoints?
- How do we address early warning signs of disengagement or role mismatch?

**Grow talent.**

- Ask questions such as:
  - Do scores on your employee culture and engagement survey consistently score low (either organization-wide or for specific groups) for career development items? Do these scores correspond with areas with high turnover rates?
  - If you conduct exit interviews, do you hear people talk about development opportunities as a contributing factor to their resignation?
  - Do you think the average employee has a clear idea of what their possible career paths could look like?

**Retain talent.**

- Ask questions such as:
  - Does the organization engage in workforce planning activities to predict future needs and make proactive adjustments to the talent strategy?
  - Does the organization conduct “stay interviews” with employees in key roles or in departments that are expected to grow/be of high future value? How do you act on that feedback?
  - Are leaders conducting regular 1:1 meetings with their direct reports? Do these meetings focus (at least in part) on how the employee is feeling overall about their employment situation, their goals, challenges, and current level of engagement? Are leaders empowered to “raise a red flag” when a strong performer shows signs of intent to leave and supported in proactively retaining that person?