

A COOs Guide to Leveraging Predictability for Strategic Advantage

Outdated scheduling practices in complex health systems are leading to critical mistakes when it comes to scheduling and deploying our workforce. Scheduling related tasks can **absorb tremendous amounts of time** from frontline leaders. A lack of strategy can lead to random over and under staffing, and/or frequent re-deployment.

When hospital staff schedules are short term you risk **sacrificing quality, continuity, and stability** for staff. For the employer you lose the ability to plan and best utilize your teams. In many instances there are enough staff. Short term approaches are **making the impact of human resource shortages worse**.

The four main issues disrupting your operations:

1. **Reactive scheduling** - A root cause of the problem lies in a reactive approach to scheduling and ***ignoring average PTO levels and sick time backfill needs***, and other underlying inefficiencies that exacerbate unfilled shifts.
2. **The pitfalls of inherited schedules** - inherited schedules can favor senior full-time staff, leaving part-time and per diem workers ***with less desirable patterns***. This doesn't just affect morale; it hinders staff retention.

3. Weak links between **budgeting practices, staff ratios, patient data, and position mix** - outdated budgeting practices, which focus on total FTE requirements. This does not guide units to optimizing FT/PT/Permanent Relief/Per Diem. This approach often results in low-quality PT offers, inefficient staffing and/or misalignment of skill.

4. **Flexibility vs. Predictability** - the tradition of re-creating 4-week, 6-week, 8-week schedules to give **employers** more “flexibility” to place PT and per diems where they appear to be needed, is not working to stabilize staffing. It is one of the ***biggest barriers to advanced planning and predictability.*** This diminished continuity in assignment as well.

Operations can unknowingly sacrifice the benefits of schedule predictability. This occurs partially because of reactive short term shift filling, but also as we **buy into the legend** that “we” as the operator - need to hold onto - ultimate scheduling flexibility until the bitter end.

In these circumstances, **trust diminishes** *between employee and employer*. We fall back on mandatory overtime, cancellations, re-deployment, and increased dependency on agency staff. The so-called flexibility that the scheduling function is built around, ends up **strangling advance shift filling into short windows**, while all hands-on deck are consumed calling out for staff calling in.

What Can We Do?

Master Long Range Schedules: Everyone Wins

Introducing predictable, repeating, master schedules can be transformative. They **offer staff a sense of control and stability, allowing them to plan their lives** around known shifts. This predictability can reduce absenteeism, ad-hoc PTO usage, and foster greater loyalty to your organization.

	WEEK 1							WEEK 2							WEEK 3							WEEK 4							Wkend		Shift type %'s	
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	off %	D	N	
1		DX	DX	DX				DX	DX					~		NX	NX				NX	NX						~	50%	50.0%	50.0%	
2	DX						~			NX			NX	NX	DX											DX	DX	~	50%	50.0%	50.0%	
3		NX	NX				NX	NX						~	DX	DX					DX	DX	DX			DX	DX	~	50%	50.0%	50.0%	
4	NX				DX	DX				DX	DX			DX	DX							DX	DX				NX	NX	50%	50.0%	50.0%	
5							DX	NX					DX	DX									NX	NX	NX		~	50%	50.0%	50.0%		

**A master schedule provides a repeating schedule of shifts for a group of employees over a set number of weeks. It repeats throughout the operational year. Each line on the master represents one position and one employee which helps with workforce planning and recruitment.*

Master rotations are significantly **easier to maintain** than manager-created schedules or self-scheduling, because there's **no need to re-create an entire schedule** each period.



Where Should You Start?

Evaluate your schedule using these five tips. They are designed to guide you in creating dependable and predictable schedules for your team.

Tip # 1 Establishing a Consistent Staffing Baseline

To ensure high-quality, predictable scheduling, it's essential to **perfectly align the master schedule with operational needs and the model of care**. This involves setting a baseline for each staff type required for each shift each day. The baseline might differ on certain days to accommodate specific valid operational needs, like occupational therapy or RN availability on weekends. A well-planned rotation meets these baseline needs efficiently, **avoiding** random overstaffing or understaffing.

Tip #2 Balancing Full-Time & Part-Time roles

The proportion of full-time to part-time staff affects both resident care and staff retention. Full-time roles offer job stability and improve care continuity, as residents become **more comfortable with familiar staff**. Part-time positions, particularly those with fewer hours, offer an ability to fill gaps for PTO and sick leave, and cater to employees seeking less than full-time hours.

Tip #3 Adhering to Labor Laws & Agreements

Scheduling must comply with labor laws and collective agreements. These **“rules” may dictate** maximum consecutive shifts, minimum weekends off, meal breaks or required rest periods between shifts. Details will vary given area, staff type, and shift length. Transparent **guidelines can be leveraged** to provide special quality parameters for your organization. Master schedules can lock down your adherence to union agreements and labor law.

Tip #4 Minimizing Employee Fatigue

Have a view to minimize fatigue in shift work, consider reducing consecutive workdays, avoiding single days on or off, **allowing ample time for shift changes** (especially from night to day), and preventing frequent, rapid switches between night and day shifts.



Tip #5 Ensuring Equity, and Equality in Scheduling

Fairness in scheduling is critical. Unless special circumstances apply, all employees should equally share shift and weekend responsibilities. **A fair schedule provides each staff member** with a similar number of weekends off and day shifts, preventing unequal distribution where junior staff get more night and weekend shifts, while **popular or senior staff get plum schedules** full of preferable weekday day shifts.

Need help assessing your current schedules and implementing change? The experts at Workforce Edge have over two decades of experience in supporting clinical and non-clinical operational leaders with workforce optimization.

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