



VISION FOR INCREASING HEALTH WORKFORCE CAPACITY

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Workforce Optimization Solutions with Proven Benefits

Most healthcare organizations are facing an urgent need to increase their healthcare workforce capacity in cost-effective ways, through better utilization and planning, in order to meet the strategic imperative of providing high-quality patient care. The quality impacts of poor staffing can affect the patient experience through adverse events, lack of continuity of care, or the inability to open beds. Employee engagement and wellness also suffers when turnover in a high-stress environment leads to pressure to work extra hours in order to meet the care needs of their patients.

Effective utilization of your workforce is realized by a strong, stable foundation. Foundational elements such as master rotations secured to budget and baseline and aligned relief workforce strategies provide predictability for employees and are sustained by defined business practices providing flexibility. With the right controls in place, units can schedule according to their budgets and operational needs, and open shifts can be filled far in advance with the right skill and at the lowest cost. Increasing predictability of scheduling encourages employees to remain loyal to their workplace, and internal churn, upskilling and redeployment in emergency situations can be more proactively managed with a higher degree of predictability for leaders and employees on the frontline.

Our expert team works with your scheduling team in the field, providing the tools, training, business practices, and change management support to transform your scheduling world using the *Workforce Edge Optimization Model*®. With joint planning, design, implementation and sustainment, we deliver high-engagement solutions. This ensures that your team is able to identify and harness the predictability in your environment and provide a high-quality, proactive, and responsive service to meet the needs of employees, managers and operations. Our work provides the ability to deliver higher predictability to frontline staff, the ability to safely generate additional positions to cover known relief requirements in advance, and an alignment to financial budgets, worked hours, models of care, and staff scheduling electronic system internal controls.

Phase 1: Assessing the Current State & Opportunities to Improve

An Opportunity Assessment from Workforce Edge will analyze the current state of scheduling services and workforce planning, including the related impacts in terms of costs, data quality, management workload, staff satisfaction, collective agreement compliance, scheduling and relief processes, governance, rotations, and software and/or scheduling tools. Leveraging real data from your payroll systems, targeted workforce surveying, and analysis of schedules and staffing levels, a workforce utilization model will be developed to quantify the benefits that you can expect from overhauling your approach to workforce planning and scheduling. Interviews and focus groups help understand the current state of scheduling – including strengths, challenges and obstacles across the organization. Our *Workforce Deployment Maturity Model®* is used to evaluate the current state and opportunities for improvement across six elements: Governance, Staffing Models, Strategic Services, Transactional Services, Business Processes and Enabling Technologies.

Phase 2: Designing the Future

Once the current state is clearly defined, we work with our clients to plan the future state which is dedicated to addressing current priorities and designing staff scheduling solutions that will meet the needs of the client organization. This phase may include organization design or validation of roles, responsibilities, and/or resourcing levels to ensure the service is appropriately sized and organized to provide both transactional and strategic services required by the organization.

Business processes are designed to meet operational needs, informed by leading practices for healthcare staffing and scheduling. Draft business processes outlining tasks and responsibilities are customized according to the unique needs of the organization including local Collective Agreements, and brought to a collaborative Design Team and/or specialized Working Groups. The Design Team is inter-disciplinary in nature to ensure that scheduling business processes will meet the needs of everyone in the organization, and Working Groups are assembled for specialized processes that impact only certain areas. Broad awareness and strong ownership of the future state is built during this phase, using professionally facilitated workshops to create the new way of working. Once approved, processes are translated into standard operating procedures and training materials for schedulers, employees, and managers. A standard interpretation guide is also prepared as a tool to ensure Collective Agreements are consistently and correctly interpreted across the organization.

Phase 3: Harnessing Predictability

Effective use of both the unit-based and relief workforce cannot be achieved without ensuring balanced master rotations are in place for all full and part time employees, with appropriate sizing, planning and management of the relief workforce. Therefore, in parallel with process design work, rotation and relief optimization is typically piloted in a few selected areas. Optimization ensures the ability to deploy the right resource with the right skill in the right place when needed, with consideration of the patient, employee, and organizational impacts. Preparatory activities include relief workforce analytics, confirmation of unit/site baseline staffing needs, and surveying of employees to collect preferences for their schedule. With this information, an optimized future state plan is created and employees are mapped to the plan to identify transition impacts and/or changes required. Once a plan is confirmed, the new master rotation is designed and reviewed for quality and compliance. We then support the manager and HR through an implementation preparation workshop and by providing key messages for communications with unions and employees to support the change.

Phase 4: Developing Internal Capacity

Our certification and training programs and executive / scheduling leadership coaching services are designed to increase the capability of your scheduling service to meet the needs of your organization:

- Our Certification in Master Rotation Design (CMRD) teaches schedulers how to build a balanced, compliant, and equitable master rotation.
- Our Certification in Relief Workforce Analytics (CWFA) teaches analysts how to predict relief workforce needs and advise managers on required staffing levels.
- Our Executive Coaching for Scheduling Leaders provides weekly or monthly support for scheduling office managers and scheduling directors to steer a smooth course, address emergent issues, and sustain the change.



Making healthcare *work* better.

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