Facilitating Compassionate Workforce Transition

St. Joseph Health
June 3, 2013

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supported by
Deborah Proctor, President and CEO St. Joseph Health
Jeff Thies, VP Leadership Institute
Objectives

After attending this session, participants will be able to:

• Describe the vision for and components of the Talent Planning and Resource Center (TP & RC)
• Describe the evolving support and development provided to employees
• Identify collaborative opportunities to extend the process and approach within the shared community of Catholic Health Care
We dedicate ourselves in all our works to creative collaboration in ministry with others. Sharing our spirituality is an important dimension of that collaboration.

Article 15
Inspiration

In all things, we seek to be faithful to our understanding of mission and ministry, with special attention to the Quality of Worklife, which we understand to be one of the Essential Elements of Healthcare

“Work is an expression of the dignity of the worker. We provide a worklife characterized by justice, dignity and collaboration. Equitable salary scales and benefits, a safe environment, and opportunities for growth and development are expressions of this commitment” (St. Joseph Health Directional Statement)
Commitment to Our Mission, Vision and Values

Honoring our mission, vision and values, SJH built a capability to develop people. The objective of this function is to preserve dignity by providing innovative and comprehensive support for employees who have been or will be impacted by organizational changes.

VALUES

EXCELLENCE
We foster personal and professional development, accountability, innovation, teamwork, and commitment to quality.

DIGNITY
We respect each person as an intrinsically valuable member of the human community and as a unique expression of life.

SERVICE
We bring together people who recognize that every interaction is a unique opportunity to serve one another, the community and society.

JUSTICE
We advocate for systems and structures that are attuned to the needs of the vulnerable and disadvantaged and that promote a sense of community among all persons.
A Healthcare Environment in the Midst of Change and Innovation

As healthcare continues to evolve, St. Joseph Health is faced with an ever-changing environment. This requires us to provide affordable care while remaining true to our mission, vision, and values, and to use innovative methods to develop our employees.

Anticipated Changes in the Workforce:

- New jobs, scope of roles changing, and some being eliminated
- Increased need for broaden skills or cross-training
- Greater use of higher education to address talent shortages
- Increased focus on population management
- Need to improve technology related skills
- Greater demand for professional and leadership capabilities
- Need for employees to better understand the future of health care delivery and demonstrate “business acumen”
Shared Concern of HR and Mission Integration

In the tradition of the Sisters of St. Joseph of Orange, Human Resources and Mission Integration partnered together in the development and support of our employees and ministries to meet the needs created by the rapidly changing healthcare environment.

Support for Employees
- Enhanced skills, experience and acumen
- Increased understanding of industry changes and career path options
- Improved engagement, morale, and loyalty

Support for Ministries & Communities
- Retained organizational knowledge and values
- Proactive understanding of future skill needs
- Demonstrated collaboration within the communities we serve
Discussion

What are the greatest challenges that you face in repositioning your workforce?

What challenges or obstacles do you face in this effort?
Recognition of the Opportunity

As an extension of our mission, the Talent Planning and Resource Center was created and launched to foster discernment, proactively prepare the workforce for future roles and support the organization in transitioning to the future healthcare delivery model.
TP&RC Model: Current and Future Capability

TP&RC provides workforce planning, transitional support and people development that aligns organizational skills and capabilities with SJH’s strategic vision.

**Phase 1: FY12-13**
Operational Performance and Organizational Alignment

- Tactical, relevant job placement services to address near term productivity, organizational alignment and operational performance impacts

**Phase 2: FY 13-14**
Specialized Talent Development

- Services that support the development individual and team skills to best position and support the future Healthcare operating model.
- Support of patient centered medical home model, population management, and other future models.

**Phase 3: FY14-18**
Strategic Workforce Planning and Talent Development

- Proactive workforce planning to align talent capabilities to continuum of care operating model needs
Phase 1: Transition Support

Initially, the Talent Planning and Resource Center focused on providing seamless support for employees whose role, position or skill requirements had been affected by operational improvement initiatives.

**EMPLOYEE 90-DAY SERVICES**

- A transition specialist provides proactive job search coaching
- Assessments and alignment of interests and capabilities
- Goal setting
- Search strategy methods and support
- Interview preparation and practice
- Job concierge services i.e., handpicked job leads
- Transition Concierge e.g., “On-the-Go mobile application
- Custom professional resume/cover letter
- Expert-led live webinar series
- Career content including: industry trends, market research, and professional development information

**Whole Person Support:**
Mind, Body, Spirit

**Talent Capabilities:**
Skills, Job, Career Goals

**Career Paths:**
Employee Skills and Interest

**Training:**
Job Preparation and Search Skills

**Position Identification:**
Internal/External alignment of skills and customized job matching

**Change Management:**
Managing emotions, Approaching Change and Transitioning to a New Role
“Carrie was very supportive and consistent. She provided excellent information related to my job search and helping me make decisions in which direction would be best in a difficult and changing labor market.”

“Consistently hands on, enthusiastic and supportive. We had conference calls weekly for status report and informational updates. Extremely professional, personable, and proactive.”

“Thank you so much. I was able to review both the resume and cover letter. I think they look great. Thank you again for all your help.”

“I have been communicating with Dawn, she has helped me out and has given me ideas on where to look for employment. She's lifted my spirits when I was feeling discouraged. Thank you Dawn.

Patty is amazing and always seems to know what I need before I even ask. She tailors our visits to meet my needs at the time. She did an amazing job preparing me for a very important interview which went very well.
Early Successes

- Re-employment of ~50% of impacted employees
  - *Internal placement: 27%*
  - *External placement: 21%*
- Re-assignment of 5% of impacted employees for short-term and long term project management needs
- Highly rated transition and job placement services
- Emphasis on in-placement and personal growth
- Increased sense of accountability of ministry executives for individual employee success across all ministries

Satisfaction (On a scale of 1 to 10)
- Transition Specialist: 9.3
- Resume: 9
- Portal Access and Job Leads: 8.1
- Overall Satisfaction: 9

64.2% Response Rate

Employee Placement

<table>
<thead>
<tr>
<th>TO DATE:</th>
<th>TOTAL FOUND JOB TO</th>
<th>% TOTAL to Date</th>
<th>Average Time to Job-TOTAL</th>
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<tbody>
<tr>
<td>Covenant Health System</td>
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<tr>
<td>Home Health</td>
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<tr>
<td>Mission Hospital</td>
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<td>42.1%</td>
<td>86.4</td>
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<td>77.8%</td>
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<td>78.2</td>
</tr>
<tr>
<td>Grand Total (Based on Completed Service)</td>
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<td>48.2%</td>
<td>69.3 Days</td>
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TOTAL PLACED OVERALL

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TOTAL FOUND JOB TO DATE
Key Lessons Learned

- Early involvement and onboarding of Human Resources and Mission Integration has been key to a successful launch of the Center.

- To maximize the ability to match impacted employees to open St. Joseph Health positions, it is imperative that:
  - The TP&RC team understands the SJH roles, functions, departments, and hierarchies within the ministries.
  - The appropriate ministry personnel have visibility to the skills and capabilities of TP&RC participants.

- Advance identification of impacted employees and communication to system office is critical to enable a clear and timely introduction to the TP&RC for impacted employees.

Example or Mitigating Action

- HR has shared information with impacted employees about the TP&RC and connected them to resources. MI has provided impactful one-on-one and group spiritual care to support employees.

- Additional processes have been created and meetings conducted with HR to gather and disseminate critical data. A portal of open positions was created for cross-ministry job openings.

- Establish partnerships with other healthcare organizations.

- Profiles of TP&RC participants will be shared with key SJH personnel (and potentially other hospitals) to facilitate matching.

- Ministry and HR leadership need to proactively plan employee impacts and encourage coordination between the ministries and system office.
## Budget

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<td>• Third party vendor support $1,200 per employee</td>
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<td>• Loaded salary costs for continued employment of 60 days beyond 30 day transition</td>
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<td></td>
<td>• Team of three (program manager and two analysts) to support management and development $500,000</td>
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<td>• One-time cost of workforce planning tool and process estimated at $250,000</td>
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Phase 2: Specialized Talent Development

In an effort to build on transition services, the TP&RC expanded its focus to work with specific departments and programs to build customized and specialized talent development.

Recognized needs Due to Workforce Changes and Progression Towards the Continuum of Care:

- **Broaden skill sets/cross-train** to create a more versatile/flexible workforce and reduce costs
- Greater use of **mid-level/lower skilled practitioners**
- **Higher education/enhanced skills** to provide better patient outcomes and address talent shortages
- Larger focus on **population management/wellness** in ambulatory/home settings
- Necessity for workforce to improve **technology related capabilities/skills**
- Growing demand for **professional and leadership capabilities** to enable transition to a continuum of care
TP&RC and Patient Centered Medical Care Model – “CARE Connect”

TP&RC is providing development support for this new patient centered medical care model including recruiting internal employees, providing team dynamics, and developing new skills for the CARE team.

The CARE Connect Team Provides:
- Primary care-based care management for predicted high risk patients
- Trained care managers manage medically complex patients, working closely with patients and the PCP
- Patient-centered and patient directed care
- Strong and trusting relationships
CARE Connect - Development and Support Plan

The TP&RC development and support plan framework is a combination of program support and skill development in an effort to fill the gap and recognized skill needs to support the successful implementation of the future patient centered care model e.g., CARE Connect program.

**April**
- **Training**
  - Training to educate clinicians on tools and collaboration
  - Training for nurses to transition into the role of care coordinator in both the acute care and community settings.

**May**
- **Recruitment**
  - This role must have BSN and interpersonal effectiveness and relational skills and ability to work in a multi-faceted, fast changing environment

**June**
- **Leadership Coaching**
  - Assess leadership styles and develop
  - Clarify expectations of leadership within the team
  - Discuss Situational Leadership model and clarify use

- **Interpersonal Effectiveness**
  - Understand and increase self awareness
  - Practice and customize approach based on understanding of others
  - Practice empathy relative to working with team and patients

**July**
- **Team Effectiveness**
  - Discuss basic understanding of what makes a “team”
  - Discuss 4 stages of team formation
  - Build list of agreed-upon norms

**August**
- **Effective Communication**
  - Discuss methods and impact of communication: verbal and non-verbal
  - Discuss and practice active listening
  - Discuss channels of communication between team members, with team and clients; methods of problem solving

**Stakeholders:**
- Leadership
- Physicians
- Nurses

**Content/Focus**
- **PBGH:** Care Coordinator Academy
- **Western University:** Transition Care Coordinator Program
- **TP&RC:** Nurses in the current talent pool that have interest in care management.
Phase 3: Future TP&RC Opportunities

- Proactive workforce planning and employee skilling to align talent capabilities with the direction of new models in healthcare.

- Provide services that support the development of job relevant skills to best transition employees to future state roles.

- Use of regional and centers of excellence resources to develop employees for future needs.

- Partnerships with community and educational establishments to insure curriculum mirrors future employment needs.

**Increased Use of Technology**
- Basic computer programs
- Customized online training
- Smartphone applications, e.g., on-the-go training

**Developing Multi-Skilled Roles**
(i.e. Monitor Tech, Phlebotomy Tech, Nursing Assistant)
- Implementation of cross-training program
- Role shadowing
- Organizational internship partnerships
- Mentoring program

**Educating for Specialty Tech Roles**
(i.e. Pharmacy, Radiology, Surgical)
- University partnerships
- Internal training programs
- Increased education reimbursement
TP&RC Future State Operating Model Overview

Steering Committee

Workforce Planning

T&OE COE (Center of Excellence)

Awareness & Career Alignment
- Industry/SJH Awareness
- Workforce Analytics
- Career Paths/Planning

Skill Building
- Best Practice Sharing
- External Education
- OTJ Training
- Internal Programs

Transition Support
- Transition Coaching
- Job Search Preparation
- Opportunity Identification

Placement & Effectiveness
- Internal
- External
- Reporting & Measurement

Spiritual Care

TP&RC
Ministries
Other Partnerships
To be a community that serves, that speaks, that celebrates, and prays in such a way that others - regardless of their religious belief - encountering this community experience a revelation of life’s deepest truths - about human dignity, community, success, power, growth, sacrifice, love, suffering, debility and death.

Experiencing a harmony between their heart’s deepest resonances and this community’s character, persons go from this encounter more healed, more whole, more able to live, to love, to hope, to die.

*Jack Glaser*
Group Discussion/Report-Out

In groups, brainstorm other opportunities for this type of program:

- What resonates and is applicable to the challenges your organization is currently facing?
- Which development tracks or institutional partnerships are most critical to reposition employees?
- What opportunities are there for collectively working on extensions of this effort?
Final Thoughts

Talent Planning and Resource Center is committed to investing in SJH employees to enhance engagement and morale. By establishing cross-ministry and Catholic Healthcare partnerships, we seek to provide skill development, and internal and external job placement through a holistic approach. We focus on maintaining the dignity of the person in support of our employees continuing meaningful work.

Next Steps:
- Aggregate group discussion information
- Distribute/post for group reference
- Support follow-up discussions regarding TP&RC