Pre-Conference Staffing Workshop
Morning Session

James Fenush Jr. MS, RN
Director of Nursing, Clinical Support Services

Rita Barry BSN, RN
Nurse Manager of Scheduling and Staff Deployment
• 551-bed Academic/Quaternary Care Medical Center in central Pennsylvania
• The Medical Center campus also includes:
  - Penn State College of Medicine
  - Penn State Hershey Cancer Institute
  - Penn State Hershey Children’s Hospital
Penn State Hershey Vital Statistics

- 1,700 students, residents and fellows
- $98 million in funded research
- 423 adult beds
- 128 pediatric beds
- 96 psychiatric beds
- 98 rehabilitation beds
- 28,654 hospital admissions
- 1,034,663 outpatient clinic visits
- 72,493 emergency room visits
- 10,000+ employees (2200 Nurses)
- 1,100-provider Medical Group
- 63 specialty practices at 24 clinic locations
- 173 doctors “Best Doctors in America”
Welcome

• Overview of morning session
• Review Leaning Objectives

➤ **Session Objective One:** Describe the advantages of implementing a strategic labor plan for a Department of Nursing

➤ **Session Objective Two:** Identify strategies for implementing standardized workflows associated with staffing adequacy

• Housekeeping Items
Table Activity- 10 Minutes

Brainstorming:

1. What are your greatest staffing and scheduling challenges?
2. What process(es) is working well related to staffing and scheduling?
3. Highlight one innovation related to staffing or scheduling from your organization

Text your tables best solution to 22333
Report Out Activity- 10 Minutes
“Staffing for an Awesome Day”

- [https://youtu.be/yNhmI1G_f3g](https://youtu.be/yNhmI1G_f3g)
PLAN
Develop Resource Goals

SCHEDULE
Maximize Core Staff Resources

STAFF
Proactively Fill Open Shifts

DEPLOY
Strategically Allocate Resources Across System

IMPROVE
Use Real-Time Business Intelligence

✓ Labor Standards & Workload Indicators
✓ Build Optimal Cyclic Patterns
✓ Identify, Develop and Maintain Consistent Policies & Strategies
✓ Schedule Staff to FTE
✓ Produce Balanced Schedules
✓ Manage PTO and Trades Effectively
✓ Maintain Recommended Core to Contingency Ratio
✓ Communicate Any Last-Minute Changes or Needs
✓ Provide latest Census and Acuity Information
✓ Finalize Resource Plan
✓ Improve Resource Plans Based on Outcome Data
THE STAFFING & SCHEDULING PLAN

• Develop resource goals
  ➢ Develop HPPD or Hours per primary unit based on internal and external benchmarks
  ➢ Budget (Staffing Grids/Workload Metrics)
    ❖ Assess FTE in’s and out’s
• Review/Create Master Schedule
  ➢ Define Weekend Cyclic Rotation
• Leverage a Position Control
  ➢ Update ongoing and tie to Master Schedule
• Create a formalized vacation request process
• Evaluate requests for PTO, Education time, Council time
  • Process these requests in advance of operational schedule
THE STAFFING & SCHEDULING PLAN

• Develop Resource Goals
  ➢ Develop HPPD or Hours per primary unit based on internal and external benchmarks
  ➢ Budget (Staffing Grids/Workload Metrics)
    • Assess FTE in’s and out’s
Master Schedule Template

Review/Create Master Schedule
Define Weekend Cyclic Rotation

| Master Schedule | SUN | MON | TUE | WED | THU | FRI | SAT | SUN | MON | TUE | WED | THU | FRI | SAT | SUN | MON | TUE | WED | THU | FRI | SAT |
|-----------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
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Position Control 101: Manage your organization’s structure
Position Control Template

- Leverage a Position Control
  - Update ongoing and tie to Master Schedule

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**PLAN**

Develop Resource Goals
THE STAFFING & SCHEDULING PLAN

• Create a formalized vacation request process

• Evaluate requests for PTO, Education time, Council time
  • Process these requests in advance of operational schedule
QUESTIONS RELATED TO PLAN?
Schedule – Maximize Core Staff Resources

• Employees must all have schedules to ensure their time is being recorded properly.
• Staff should be scheduled to their FTE commitment
   identify and manage any FTE leakage.
• Evaluate the mix of FT, PT and PRN staff and maximize the use of PT and PRN staff.
• Evaluate requests for PTO, Education and Council time in advance of operational schedule.
• Consider seasonal demand fluctuations.
Layers of Contingency Resources

- **Enterprise Float Pool**: If you have two or more facilities within 30 minutes normal driving time, an enterprise float pool is a wise strategy.

- **Site-based Scheduled Float Pool**: A small segment of nursing generalists ready for rapid deployment and redeployment based upon your organization’s emerging needs.

- **Site-based PRN Pool**: In many situations, the largest segment of your contingency resources will come from those who work a fluctuating schedule based upon the match between your organization’s needs and the individual’s availability.

- **Unit-based PRN Pool**: Consider this the right strategy only in heavily specialized units. Examples are burn or neonatal intensive care departments.
Layers of Contingency Resources

• **Core staff in extra shifts and overtime**: Regrettably this is far too often the primary source of healthcare contingency staff. To prevent burnout and erosion to morale, this should be your rarely used, never over-used, go-to strategy during times of extraordinary need.

• **The RIGHT Agency Partnership**: Previously considered the absolute WRONG strategy,
  – Carefully choosing and nurturing relationships with one or two high-quality local agencies.

• **Travelers**: In the past, some organizations over used this strategy giving it a well-deserved bad reputation.
Schedule – Creation of a schedule

• Leverage self-scheduling to build core schedule.
• Use repeatable patterns (cyclic schedules) when possible, for example weekend rotations.
• Monitor the regularity of scheduled OT shifts and review how you are scheduling employees.
• Define a process to fill open shifts prior to finalization.
• Produce a balanced schedule.
QUESTIONS RELATED TO SCHEDULE?
15 Minute Refreshment Break
Staff - Proactive Strategies

• Manage PTO and shift trades
• Review your staffing and schedule needs every day and have a plan to address staffing concerns
  ❖ 24/48 hour rule (Charge Nurse/Nurse Manager)
• Identify areas of concern within the next day, week and month including high staffing needs for specific skills
• Maintain recommended core to contingency ratio
Staff – Proactive Strategies

- Develop a communication strategy for “critical staffing” alerts
  - Staff huddles and/or weekly briefings
- Use proactive recruitment techniques
  - Open Shifts
  - Incentive Shifts
  - Short Term Assignment Contracts
- Create a standard process for staff absence calls
- Utilize tools for communicating these situations to managers
  - Automated email and text page capability
Staff – Proactive Strategies
Table Activity- 10 Minutes

Table Discussion: 5 mins

How do you determine how much PTO and nonproductive time to grant?

Report Out: 5 mins

Text your tables best solution to 22333
QUESTIONS RELATED TO STAFF?
Deploy – Strategically Allocate Resources

Process of Central Staffing Office - Intelligence

• Record Volume Exceptions
• Develop Preliminary Staffing Plan
  ➢ Align census and workload to staffing
• Deploy Available Contingency Resources to Meet Actual Demand
• Recruitment Call List
Deploy – Strategically Allocate Resources

Process of Clinical Decision Makers

• Communicate Changes and Real-Time Volume Exceptions
  ➢ Review Unit Stressors & Workload
  ➢ Review Staffing Plan (HPPD)

• Approve Finalized Resource Plan
Evaluation of Unit Based Workflow:
Enter Unit Name
Medical ICU

Evaluation of Patient Flow

- Number of projected Admission, Transfers, & Discharges (ins and outs)
- Number of tests, procedures, where RN must accompany (of the unit)

Triage Questions
Enter specific population within the defined unit

- What is patient logistics planning?
- Are there any downgrades that you anticipate based on discussions with the primary team/Care Management?
- Have you received report on any of your transfers in?
- Is there a less acute patient to move off service?
- How many outside transfers are waiting?

Define Special Populations (that may require additional resources based on workload)
Enter specific population within the defined unit
Examples:

> 1:1 patients for CRRT
> 1:1 patients Hypothermia/post code/re-warming hypothermia
> Gift of Life
> 1:1 patients Critical GI Bleed /Liver failure/Pulmonary Hemorrhage
### HPPD Staffing Grid

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**Legend:**
- **HPPD over budget**
- **HPPD within budget**
Nursing Staffing Status

Penn State Hershey Medical Center
3 South Addition

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Budgeted HPPD: 8.84
QUESTIONS RELATED TO DEPLOY?
10 Minute Refreshment Break
Improve Staffing & Scheduling

• Review data real-time
  ➢ Create a data repository
    ▪ Open access to create transparency
• Evaluate hours and costs of resources against financial targets
• Analyze hours and costs of time worked above scheduled shifts
• Analyze FTEs against budget and volume trends
Improve – Using Business Intelligence

Evaluate your scheduling practices

• Assess high contingency usage
  ➢ May indicate a shortage of core resources

• Evaluate volume fluctuations and the impact on staffing demands

• Evaluate fill rate trends
  ➢ May indicate over or under staffing
Improve – Using Business Intelligence

Maintain schedule history integrity and accurate payroll

• Identify cost center variances to determine if you have been charged for resources you never received.

• Review variances between scheduled shifts and time and attendance punches.

• Use tardy and over (incidental work time) variances to recognize trends and identify opportunities for process improvement.
Improve – Using Business Intelligence

Analyze productivity and cost associated with actual staffing resources

• Review productivity which is derived from your staffing demand hours divided by your actual worked hours.
• Review worked hours and costs, recognizing whether they are over or under budgeted targets.
• Review the breakdown of staffing costs by skill to recognize the financial impact of contingency resources, overtime and shift differential.
Monitoring of Outcomes

Financial
• Reduce overtime
• Decrease incidental worked time
• Cut FTE leakage
• Right size core to contingency staffing

Operational
• Increase RN shift fill rate
• Manage time spent on scheduling and staffing
• Review data relative to clinical nurse hours in charge versus patient assignment time

“Inspect what you expect”
Managing FTE Leakage

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QUESTIONS RELATED TO IMPROVE?
Summary/Key Points

A Comprehensive nursing workforce analysis and workflow assessment consist of the following:

- A **plan** to optimize labor standards and workload indicators
- The ability to create a balanced **schedule**
- Proactively fill needs in line with the units core vs. contingency **staffing**
- Communicate the workflow of a nursing unit to be able to strategically **deploy** resources throughout
- Consistent staffing and scheduling **improves** outcomes
Action Items

Development of strategic labor plan and standardized workflows can be done through implementation of a state-of-the-art technology solution &/or through simply making key changes such as:

- Standardize policies and procedures for timekeeping
- 1st rule in setting up a schedule – Weekend Cyclic Pattern
- Review employees work flow who consistently clock in early and late
- Plan for lunches
- Look for FTE leakage prior to completing schedule
- Listen to workflow issues to deploy resources and manage to define staffing plans
- Develop a flexible contingency pool (layered)
References
# Contact Information

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<thead>
<tr>
<th><strong>Rita Barry</strong></th>
<th><strong>James Fenush</strong></th>
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<tbody>
<tr>
<td>Nurse Manager Scheduling &amp; Staff Deployment</td>
<td>Director of Nursing, Clinical Support Services</td>
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<tr>
<td><a href="mailto:rbarry@psu.edu">rbarry@psu.edu</a></td>
<td><a href="mailto:jfenush@psu.edu">jfenush@psu.edu</a></td>
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<tr>
<td>717.531.2928</td>
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- Rita Barry's contact information: rbarry@psu.edu, 717.531.2928
- James Fenush's contact information: jfenush@psu.edu, 717.531.3965
Vendor Sponsored Lunch
12:00P-2:00P