2016 American Nurses Association Annual Conference

Connecting **Quality**, **Safety** and **Staffing** to Improve Outcomes

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

MARCH 9–11, 2016 LAKE BUENA VISTA, FL www.nursingworld.org/ANAconference

ANA AMERICAN NURSES ASSOCIATION

- 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

PennState Health
Milton S. Hershey Medical Center

MAGNET RECOGNIZED
AMERICAN NURSES CREDENTIALING CENTER

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

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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

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"Staffing for an Awesome Day"

- https://youtu.be/yNhmI1G_f3g

- ✓ 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**
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Master Schedule Template

Review/Create Master Schedule
Define Weekend Cyclic Rotation

PENNSTATE HERSHEY Nursing

Master Schedule	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
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PLAN
Develop Resource Goals

Position Control 101: Manage your organization's structure

Position Control Template

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

Penn State Hershey Medical Center — **Unit/ CC Name**

Position Control File

PennState Health
Milton S. Hershey Medical Center

Job Title: Leadership Positions:

Unit Position	Unit Position Number	Name	Job Req #	Budget FTE	Filled FTE	SHIFT/HOURS	Weekend Rotation	HMC Hire Date	Position Hire Date	Previous Employee	Transfer/Term Date
	1										
	2										
	3										
				0.0	0.0						

Job Title: RN's

Unit Position	Unit Position Number	Name	Job Req #	Budget	Filled	SHIFT/HOURS	Weekend Rotation	HMC Hire Date	Position Hire Date	Previous Employee	Transfer/Term Date

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?

PLAN

Develop Resource Goals

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?

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15 Minute Refreshment Break

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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

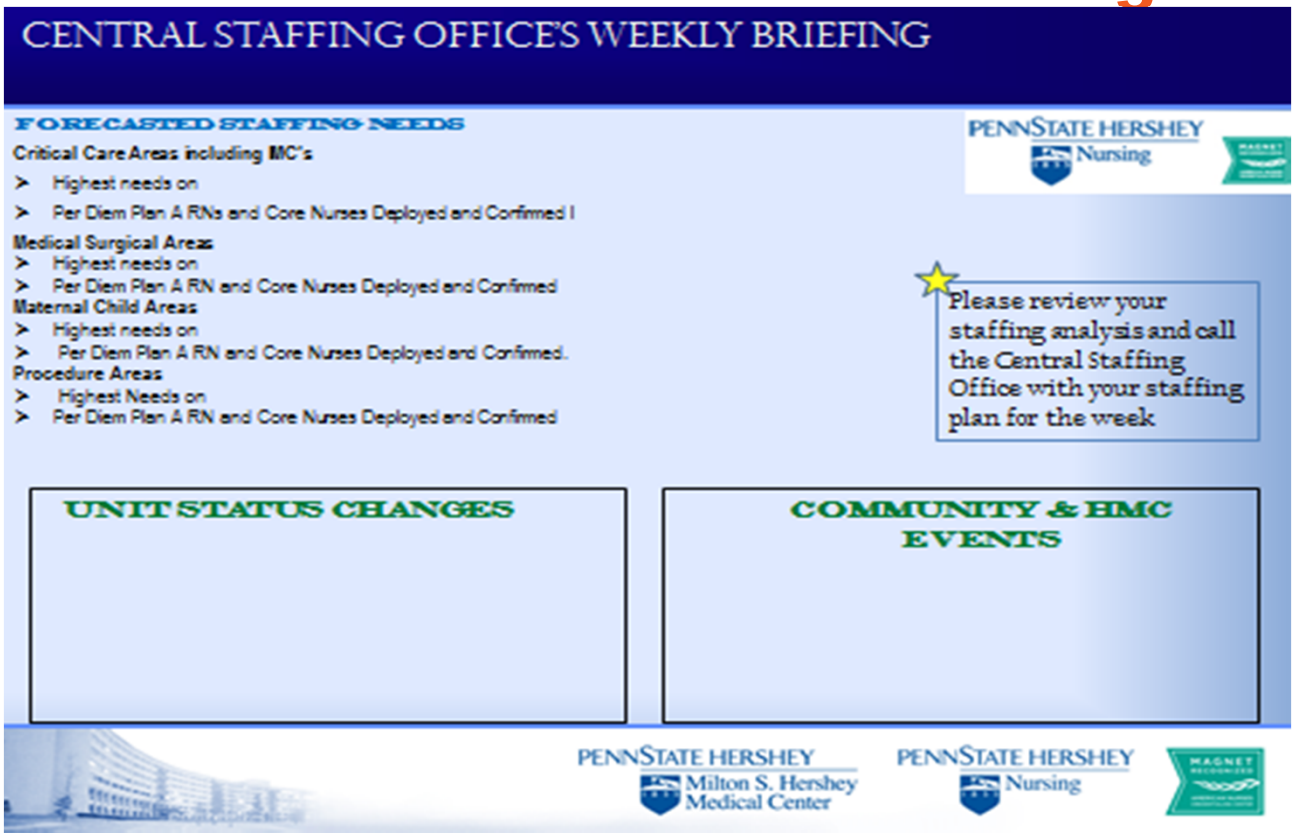

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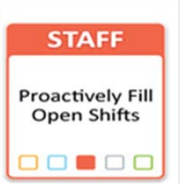
Table Activity- 10 Minutes

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



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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

2016 Ame
Connect

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 (off 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/Case 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

Census	RN	PCA	HPPD		Bud HPPD
					9.36
44	12	5	9.27		
43	12	5	9.49		
42	12	4	9.14		
41	12	4	9.37		
40	11	4	9.00		
39	11	4	9.23		
38	11	3	8.84		
37	11	3	9.08		
36	11	3	9.33		
35	10	3	8.91		
34	10	3	9.18		
33	9	3	8.73		
32	9	3	9.00		
31	9	3	9.29		

HPPD over budget

HPPD within budget

Nursing Staffing Status

Penn State Hershey Medical Center
3 South Addition

	Input Data			Hours per Patient Day	
				Hourly	Cumulative
	Census	RNs	PCAs	Under / Over Budget	Under / Over Budget
3am					
7am					
11am					
3pm					
7pm					
11pm					

Budgeted HPPD
8.84

QUESTIONS RELATED TO DEPLOY?

DEPLOY

Strategically Allocate Resources Across System

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10 Minute Refreshment Break

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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

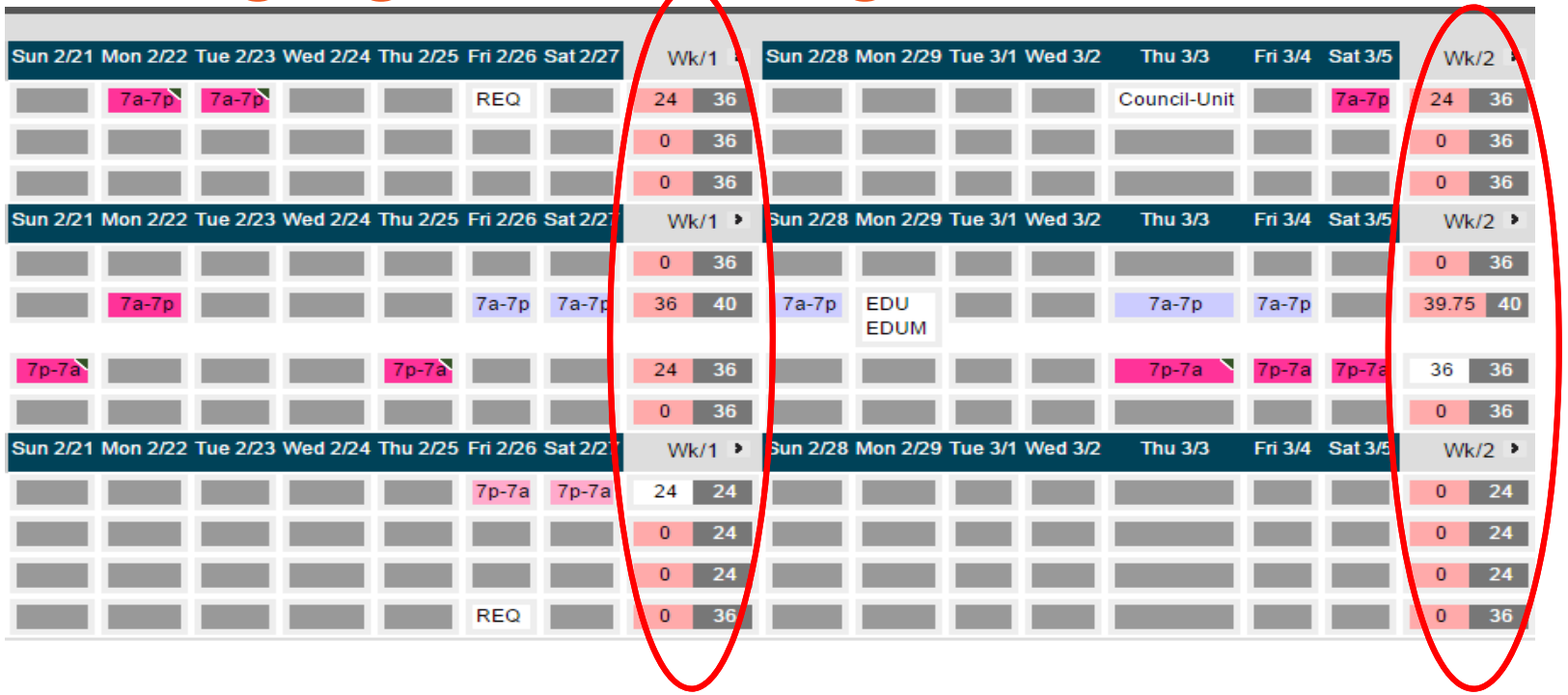
- Reduce overtime
- Decrease incidental worked time
- Cut FTE leakage
- Right size core to contingency staffing

"Inspect what you expect"

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

Managing FTE Leakage



Sun 2/21	Mon 2/22	Tue 2/23	Wed 2/24	Thu 2/25	Fri 2/26	Sat 2/27	Wk/1		Sun 2/28	Mon 2/29	Tue 3/1	Wed 3/2	Thu 3/3	Fri 3/4	Sat 3/5	Wk/2	
	7a-7p	7a-7p			REQ		24	36					Council-Unit		7a-7p	24	36
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Sun 2/21	Mon 2/22	Tue 2/23	Wed 2/24	Thu 2/25	Fri 2/26	Sat 2/27	Wk/1		Sun 2/28	Mon 2/29	Tue 3/1	Wed 3/2	Thu 3/3	Fri 3/4	Sat 3/5	Wk/2	
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IMPROVE

Use Real-Time Business Intelligence

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)

QUESTIONS?

References

Optimal Nurse Staffing to Improve Quality of Care and Patient Outcomes

Contact Information

Rita Barry
Nurse Manager Scheduling & Staff Deployment

Penn State Hershey Medical Center
Penn State College of Medicine
500 University Drive
MC H101
Hershey, PA 17033-0855

rbarry@psu.edu
717.531.2928

James Fenush
Director of Nursing, Clinical Support Services

Penn State Hershey Medical Center
Penn State College of Medicine
500 University Drive
MC H101
Hershey, PA 17033-0855

jfenush@psu.edu
717.531.3965

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Vendor Sponsored Lunch 12:00P-2:00P

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