

Jill Sawyer:

Good afternoon and welcome to the Acute Care Learning Series the Advantages of Engaging Frontline Staff in Policy Ownership and Management. Sponsored by PolicyStat.

My name is Jill Sawyer product marketing manager at PolicyStat. I would like to introduce today's speaker Cheryl Kirchner.

Cheryl is the owner and senior consultant for Willow Tree Health Care Consulting. She has over 25 years of experience in the health care industry that includes systems level health care leadership with a specialization in quality improvement, directing performance improvement initiatives for acute care hospitals, managing quality projects for Medicare and Medicaid programs, and critical care clinical nursing. Cheryl's clinical experience is in critical care nursing including work at University of Alabama and and Vanderbilt university

She obtained her BSN from Pert University and a Masters Science Degree in Evaluative Clinical Sciences from Dartmouth College. Sheryl also served as the Baldrige National Examiner in 2013. Before we get started, just a couple of housekeeping items throughout the presentation we'll be asking questions using the polling feature.

We will leave polls open for a short period of time and then continue on with the presentation. If you have questions, please use the chat feature and we'll be monitoring throughout.

For those of you just joining, welcome. right now I would like to turn it over to Cheryl.

Cheryl Kirchner:

Thank you, Jill. And, welcome everyone. Thank you for making time in your busy day for this webinar.

The PolicyStat Acute Care Learning Series is designed to connect you with practical application tips for document management.

The leading objectives for this entire learning series center around knowledge, comprehension, and application.

The leading object for the participants who attend the learning series are to recall relevant terms and definitions, describe examples of implementation, and to extrapolate concepts for application in their home organization.

As we go along, we will review two slides one or two on knowledge, one or two on comprehension, and, then, one or two on application.

We'll be presented with thought-provoking questions as we progress throughout this learning activity. I encourage you to take notes and reflect on what you have discovered.

Today's content objectives for this webinar topic on the advantages of engaging frontline staff

in policy ownership and management are that it supports shared governance models, promotes equitable distribution of work, and that it can be used to provide objective performance evaluation data.

Objective one: support shared governance. Shared governance is a decision-making model focused on empowering the people who care for patients. It's a fundamental requirement of hospitals who apply for magnet status. They must demonstrate an effective shared governance structure.

Now, let's test out our polling feature and post our first question

Does your current organization promote shared governance?

Jill Sawyer:

So, we're gonna go ahead and leave this open for just a little bit.

Cheryl Kirchner:

It looks like –

Jill Sawyer:

OK, it looks like.

Cheryl Kirchner:

I'm sorry, go ahead, Jill.

Jill Sawyer:

It looks like most people have voted so I am gonna go ahead and close this poll.

Cheryl Kirchner:

Great, yeah, it does appear that that some of our participants are applying for or have shared governance programs in their hospital.

That's good news. It's great for the people who work there and your organizations.

Magnet recognition from the American Nurses Credentialing Center, is the highest and most prestigious distinction a healthcare organization can receive for nursing excellence and high-quality patient care.

Shared governance promotes joint accountability and responsibility for making decisions that affect nursing practice. When frontline staff members are empowered to make decisions, they are more likely to take ownership of their practice both at and away from the bedside.

So, let's see how many of you are actually pursuing magnet status in your organization and Jill's gonna - will post the next question for us.

Jill Sawyer:

OK, the poll's now open. It looks like most people have voted, so I'm gonna go ahead and close this poll now.

Cheryl Kirchner:

Thank you, Jill. It looks like a handful of you are pursuing magnet status. It's definitely a worth cause and it's great for your organization.

At a magnet hospital, one CNO used a shared governance model to ensure that the nurses at the bedside felt their voices were being heard and that they had some control over the technologies, processes, and decisions that would affect their clinical practice.

To do this, they structured practice counsels that met monthly to discuss policy, practice, and product. A house-wide practice counsel was made up of a single representative from each unit practice counsel.

Shown on the screen is a diagram of how this could look in an organization who's implementing these practices. Consider this, could you envision this envision unit-based counsels managing policies for their scope of practice in your organization?

Another magnet program is a near-peer mentoring program for nursing research and education. This collaborative approach instills confidence in novice researchers, it prepares more experienced nurses for future leadership, and it expands the reach of established experts.

Assigning new nurses a policy to own provides them with an opportunity to learn from experienced nurses, to conduct research, and to establish professional credibility and potentially grow in leadership.

This is so important for new nurses to have these opportunities.

Think about the formal and informal policy mentors are at your organization. It may be nursing preceptors or charge nurses or maybe there's that one experienced nurse that everyone goes to when they have a question.

All of these people can help new nurses and help them grow and learn and be introduced to new concepts.

As we move into the application of these concepts to policy management, a fundamental principle is professional responsibility.

Policies and procedures help nurses to prevent errors and carry-out procedures safely to the patients. As hospitals focus on increasing safety and reliability, patient-centeredness, and efficiency, nurses' knowledge and commitment to their patients and institutions needs to be effectively mobilized.

To do this, there needs to be a structure in place to formalize this engagement. By participating in policy development and management, it's one way for nurses to serve all of the groups shown in the model on your slide.

It is shown here - it's - nurses have a professional responsibility to their patients, to their employers, to the public, and to the nursing profession, as a whole.

I submit that frontline nursing engagement is critical for success because frontline nursing knowledge is important for developing, implementing, and sustaining policy and procedure compliance. These are our subject matter experts.

A policy is only words on paper if it is not owned and implemented by the users. And who best to know what those policies and procedures are or who to research that than the very nurses and frontline caregivers who are taking care of patients every day? And after all it is their professional responsibility.

I've summarized this section in the following proposal statement.

It is possible to use a shared governance model and nursing council structure to effectively capture nurse knowledge, engage both experienced and novice users, and promote policy and procedure awareness to uphold safety and quality of care.

What do you think? How can a document management system, like PolicyStat, provide a platform to support nursing shared governance?

You can use PolicyStat to document the approval process, to show staff engagement, and, this could work for polices, annual plans, certifications - such as magnet.

Object number two.

But, before we go on, are there any questions?

Jill Sawyer:

Looks like, Cheryl, we had a question that came in.

It says, sounds like you are suggesting bedside nurses own policies and procedures. How does this work when their primary responsibility is caring for patients?

Cheryl Kirchner:

Yes. In one organization where I worked, bedside nurses did own policies. Only or two. But, it was a great opportunity to leverage what we had, a career ladder. But, there could be a similar structure in your organization, if you have one of those.

As we discussed, nurses are often the subject matter expert because they are caring for patients and, so, they are a great resource when developing content for policies.

Any others?

Jill Sawyer:

That looks like that's all the questions we have for right now.

Cheryl Kirchner:

Thank you so much.

So, objective number two: promote equitable distribution of work.

What is equitable distribution of work? One legal definition is that it's the fair but not necessarily equal division of assets and liabilities.

According to, Julie Morgenstern, who is a productivity expert and author, there are real risks involved in not distributing the workload in an equitable way.

Morgenstern says, if you overwork your high performers, you will lose them because they start to resent the fact that they're not doing - or that they are doing more. And, if you're taking away work from people who are slower, then they will lose interest.

These principles apply to policy work in acute care settings. Do the same handful of people tend to do all of the tough work around policy and procedure development and maintenance in your organization?

If so, your organization may run the risk of high-performer burn-out or slow-performer disengagement. So, what can be done to avoid all of these pitfalls? The answer is sharing the work.

A practical and general approach to sharing the work is to have a plan, clarify roles, and set expectations. Having a plan will help you prepare and will help ride your success. It's one of the most important steps in engaging frontline staff. You have to choose to do it.

Once you choose to include the frontline staff and you have a plan to engage them, the next step is to clarify the roles around how will they be engaged.

This important in knowing who your participants are and what their areas of specialty are.

And, then, finally, setting expectations. It's important that you have goals for measuring success. Does your organization have a plan, role assignment, and clear expectations for document management?

Consider that as we move along to the application of this concept.

So, let's consider how this will apply to your document management program.

In the planning phase, you may ask several general questions. How many policies does your organization manage? How are they grouped? Is this a single or multi-campus entity?

Other specific questions may center around the development of your program; finding a process to improve. Do we need to reevaluate our entire policy management program? What's the current state of our policy management program? What's a future state look like?

As you're planning, these are some very important initial questions.

As you begin and move through your planning phase, organizing a team. Who are the stakeholders? Are some of those people employees or non-employees, like physicians?

Clarify knowledge about the process. What are the current steps in our process for policy development? Who are internal and external customers of each step and how can frontline nursing staff fit into this knowledge base?

And then, finally, selecting a strategy. What is the best approach for our organization?

All these questions will help you to develop a strong plan.

As you think about roles, who will be the document owners? Will our organization engage frontline staff to equitably distribute policy ownership? Who will be the administrators and the people who have the knowledge to set up the policy logistics in the software system? Who will be the approvers? How will nursing policy approval be delegated by your chief nursing officer?

All of these questions are important as you formulate a plan around the roles for your program.

Finally, for expectations. What will be the expected turn-around time for document creation through approval? Will there be consequences for late documents and not getting things approved on time? Now think about how you promote equitable distribution of work buy-in from your frontline, middle-managers, and leadership in your organization.

Perhaps the concepts presented in this learning series topic will be of use.

If you've - if your organization is coming to PolicyStat, then you are definitely on the right track.

I've summarized this section in the following proposal statement. Equitable distribution of document management work will improve collaboration and reduce overtaxing of high-performers in our organization.

What do you think? How can the PolicyStat document management system provide the platform to support equitable distribution of work?

I'll tell you that the PolicyStat system can be used to group documents for distribution assign policies to frontline staff for ownership, to assign policies to directors and executives and leadership for approval, and to produce reports to hold assigned users accountable for turnaround times and due dates

I love this quote by Lou Hotlz. It's not the load that breaks you down; it's how you carry it. It's not the load that breaks you down; it's how you carry it.

Document management is manageable, and it can be rewarding.

The PolicyStat software provides an excellent method to control the distribution of work and to spread the load.

What questions do you have before we move on to the next section?

Jill Sawyer:

Looks like the question that came in says: how would you start recruiting bedside nurses to own policies?

Cheryl Kirchner:

What a great question.

The first step is to meet with your nursing leadership. Their support is essential.

Then, together you can discuss options which may include a reward and recognition activity.

But, I would definitely say, start with engaging your nursing leadership and gaining support and getting their ideas about how you might go about that process.

Jill Sawyer:

Looks like all the questions we have for right now.

Cheryl Kirchner:

Okay, thanks, Jill.

Objective three. Provide objective performance evaluation data.

So that we're all on the same page, what is performance evaluation and how is it defined?

One definition is that it is a formal procedure to measure employee's work and results based on their job responsibilities. The purpose is fourfold.

First, to promote communication and provide useful feedback about job performance. Two, is to facilitate better working relationships. Three is to provide an historical record of performance. And, four is to contribute to professional development.

The most effective performance evaluations include continuous feedback, regular check-ins, scheduled sessions, and clearly-defined goals.

So, how can PolicyStat help support these objectives and provide data that could be used in performance evaluation?

Well, PolicyStat can produce reports on an individual's timeliness in completing document reviews and approvals.

There's also a learning center that PolicyStat has with step-by-step instructions on how to run these reports.

We're gonna talk a little bit about SMART goals.

So, let's post another polling question and see how many of you have viewed the SMART Goal methodology to develop goals in your organization.

Jill Sawyer:

OK, the polls are now open.

OK, it looks like we've got most of our answers so I am going to go close out this poll.

Cheryl Kirchner:

Thank you, Jill.

It does look like we have some of you who have used SMART goals, so I won't spend too much time on these but we'll quickly recap what SMART goals are: specific, measurable, achievable, realistic, and time-bound.

We've talked about how PolicyStat reports - provides excellent reports to measure accountability, but did you know that PolicyStat can also be used to evaluate a program's strategic objectives?

For example, using PolicyStat a leader could use the percent of document compliance for departments, service lines, or regulatory policies.

So, we're going to talk about both.

Individual goals and organization goals. This is an example of a high-level organizational SMART goal.

By December 31, 2019, our organization will achieve 90% or better policy compliance for each department by establishing a performance-based accountability structure for timely policy review and approval or retirement.

So, let's have one more poll question here.

Does your organization have a strategic objective to maintain policy compliance?

Jill Sawyer:

The poll is open.

We'll keep it open for a couple more seconds. It looks like we've got a lot of people coming and voting right now.

Looks like we've got a lot of people coming and voting right now.

So, I am going to go ahead and close this poll now.

Cheryl Kirchner:

It looks like we do not have very many organizations with strategic objective around policy compliance.

We're gonna talk a little bit more about this and how important it is.

It's important that you consult with your leadership regarding a strategic goal tied to the investment in PolicyStat and return on investment related to avoided penalties, improved efficiency, and safer care.

Organization-wide goals and a strategic goal, even if it's just a one line strategic goal, could be most helpful to your organization.

If, for nothing else, it would be for your compliance. And, the one- the example shown here is a pretty good one.

You could use the PolicyStat software to help you measure this goal. It'll help everybody stay on - focused. It'll keep the leaders in your organization with policy compliance at top of mind and it'll trickle down to your frontline staff.

Let's talk a minute now about the individual performance evaluation goals related to document management.

I've given you a couple of examples here.

The document owner will complete the policy review and approval process at least seven days prior to the due date. And, the document approver will complete approval and - review and approval within 72 hours of policy assignment.

Perhaps you can think of other individual performance evaluation goals related to document management. Could your organization benefit from establishing performance evaluation goals related to document management?

Think about what benefits may be possible. How much easier would be for a nursing director and manager if they had at least one or two goals related to document ownership and management in - with the staff in their unit.

It's often a challenge to have measurable data for frontline staff goals for their annual core approval evaluation.

And, this would be a great way to fulfill some objective data.

I've summarized this section in the following proposal statement. The PolicyStat document management system can be used to set objective performance evaluation metrics and goals.

What do you think?

Can the PolicyStat document management system be used to set objective performance evaluation metrics and goals?

Yes, there are variety of reports that can be used to produce, uh, these type of organizational goals and frontline goals.

Engaging the frontline staff in the development of these realistic goals will also help your employee and the leaders in keeping the - their organization on track with document compliance.

What questions do you have before wrap up our webinar today?

Jill Sawyer:

Looks like, Cheryl, we've got a question.

It says, so are you saying that nurse managers and directors can run reports for individual staff nurse evaluation?

Cheryl Kirchner:

Yes. individual reports can be run, but it is important to partner with your nursing leadership to coordinate timing and frequency of reporting so that the policy administrator is not overwhelmed with requests during the performance review cycle.

So you may consider just doing a pilot test with a single unit and sort out logistics before you roll it out to all units.

It really depends on the scope of the policy ownership distribution. A single unit performance metric may be more appropriate to start with.

It's - it really depends on how advanced your organization is.

Jill Sawyer:

That looks like all the questions I've got right now.

Cheryl Kirchner:

Great. Thanks, Jill.

So, today, we've discussed the advantages engaging frontline staff in policy ownership and management.

Specifically, how frontline staff engagement supports shared governance, promotes equitable distribution of work, and provides objective performance evaluation data.

We also reviewed the ways PolicyStat software can be used to help meet these objectives.

Thank you for your time and attention.

We look forward to seeing you at the next Acute Care Learning Series webinar.

Jill Sawyer:

Thank you so much, Cheryl.

Just want to thank every for attending. If you are looking to watch the re-record of this series, please feel free to check out our support site at support@policystat.com for the broadcast.

Thanks everyone and we will see you next time.