



Five Categories Of Excellence

The Five Categories of Excellence for
Achieving Magnet[®] and Improving
Productivity and Performance

The Case for Excellence

While healthcare organizations across the country continue to confront the realities of a global economic downturn, the priority of focusing on excellence can come into question. Add to that the uncertainty that healthcare reform is raising and the myriad of factors impacting financial performance and threatening the ability to provide safe and quality care, the situation can seem daunting. However, a close examination of excellence, what it means and its impact, reveals that in these times, there may be nothing more important in which to invest.

Leaders who focus their attention on quality and efficiency, on creating environments where excellence thrives and where investments are made, not in quick fixes, but in effective and sustainable solutions find themselves equipped to respond to the ever changing forces influencing their organizations. They are the organizations that attract and retain top talent, that deliver exemplary care, who are fiscally sound and who rank among the nation's best hospitals.

One of the consequences of the introduction of pay for performance and the Assessment of Hospital Providers and Systems (HCAHPS) is that the resulting financial implications are forcing more and more attention on understanding what makes up an environment that inspires high performance. Looking at data from over 400 hospitals, Ann Kutney-Lee, et al. found that the nurse environment was significantly related to all HCAHPS patient satisfaction measures as was patient-to-nurse workload, improving work environments and nurse staffing which improves the patient experience and quality of care.¹

Healthcare Financial Management's feature story December 2006, *Building the Business Case for Clinical Quality* cautioned us that "performance improvement projects that focus on reducing costs risk undermining clinical quality, while failing to achieve any real financial benefit". When efforts are directed at labor cost reductions alone, the result can be lower quality of care, more complications and errors leading to longer LOS.² The action CMS has taken of not reimbursing for certain hospital acquired conditions brings to light even further the importance of addressing the

underlying structures of quality and efficiency. What some healthcare leaders have long understood, research is now confirming, that financial performance is an outcome of doing these things well. Equipped with this understanding, leaders are more informed and better able to define strategic initiatives that will produce the results they are looking for.

The value of focusing on excellence in all aspects of the delivery of care and the positive quality, operations, cultural and financial impact is well understood by the American Nurses Credentialing Center® (ANCC) whose purpose is to promote excellence. Considering the role of nurses in improving hospital quality and efficiency, well known healthcare economist Jack Needleman's recent work reports that what we have learned from Magnet® hospitals is that engaging front line staff in performance improvement programs is central to achieving sustained change and effective improvements in quality and efficiency of hospital care.³

"Building an environment of excellence is investing in your people. What you do in a poor economy is invest in your people; they are what is going to bring you through the hard times"

Beverly Hancock, MS, RN-BC, Education/Quality Coordinator/Magnet Program Director, Rush University Medical Center

Magnet Recognition Program® and Pathways to Excellence®

More and more hospital leaders committed to excellence choose the path of Magnet®. Developed by the American Nurses Credentialing Center® (ANCC), part of ANA, the Magnet Recognition Program® recognizes healthcare organizations that provide quality patient care, nursing excellence and who are innovators in healthcare and professional nursing practice.⁴ Obtaining the elite Magnet® designation identifies an organization as demonstrating the hallmark of excellence. Magnet® designation is one of the measures that US News & World Report uses for identifying America's Best Hospitals.

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The Magnet Recognition Program® is based on a set of quality indicators and standards of practice that define the foundation upon which a Magnet® environment is built. ANCC uses a model with 5 categories of excellence, within which 14 Forces of Magnetism® are organized. These categories give definition to the characteristics of a Magnet® organization and criteria for the rigorous quantitative and qualitative review process that determines the qualifications for awarding Magnet® designation. In the Magnet Model® surrounding the 5 categories is a circle representing the positive impact that Magnet® organizations have on global issues in nursing and healthcare.

Magnet Model® Five Categories of Excellence

1. Transformational Leadership
2. Structural Empowerment
3. Exemplary Professional Practice
4. New Knowledge, Innovation & Improvements
5. Empirical Quality results

To obtain Magnet® status requires leadership committed to, and able to, create environments in which excellence thrives. Magnet® recognized organizations enjoy status that elevates their reputation so they become a draw for nurses, doctors and patients alike who have a common interest in excellence.

Pathways to Excellence® is a related program also offered by ANCC to recognize excellence. This designation is earned by healthcare organizations that

create environments in which nurses can flourish and are identified as best places to work, demonstrated by professional satisfaction. The designation is granted based on meeting the Pathways to Excellence® criteria.⁴

“We achieved our Pathways to Excellence designation last year and made Modern Healthcare’s 100 best places to work, we really feel without this technology (Concerro) we would not have been on the forefront.”

Mona Tucker, Human Resources Director, St. Luke’s The Woodlands Hospital

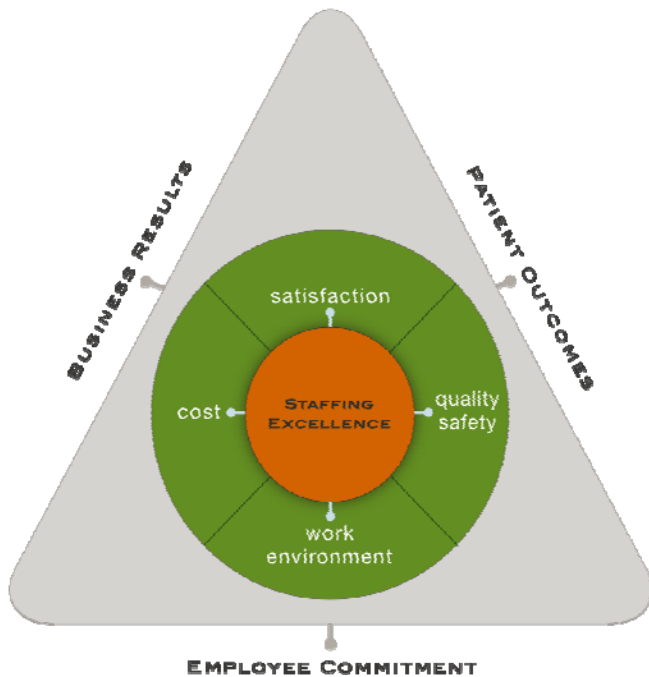
The Relationship of Staffing, Productivity, Excellence and Performance

There is now a solid body of research demonstrating the links between staffing and costs, LOS, quality, safety, healthy work environments, employee engagement and patient satisfaction.⁵ These far reaching implications place staffing effectiveness at the core of high performing organizations and highlight the need to move toward an evidence-based approach to staffing.

In response to this need, Concerro in partnership with The American Nurses Credentialing Center® (ANCC) and The Honor Society of Nursing, Sigma Theta Tau International® (STTI) brought together experts from across the country to develop a model for evidence-based staffing and to define excellence in staffing and the supporting best practices. The outcome of this collaboration can be found in the paper Excellence and Evidence in Staffing; Essential Links to Staffing Strategies, Design and Solutions for Healthcare available at www.ideaconnect2.com.

The focus on excellence, as a way to approach the challenges of healthcare staffing, is not new to Concerro. In 2002, Concerro recognized the need to bring the broad impact of staffing on organizational performance to the forefront and created the triangle model to summarize the importance of staffing.

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Effective healthcare leaders, who fully understand the links between staffing and the many aspects of care delivery that are influenced by staffing, have integrated that understanding into initiatives that drive staffing excellence. Informed re-design of staffing structures, leveraging new technologies and empowering staff participation results in achieving new levels of productivity that drive financial and operational performance.

“Improving financials is an outcome of doing business well. We implemented this new technology because it is a proven solution that I knew from first-hand experience would enable us to advance MCHD’s new strategic imperatives.”

Jeff Turner, MSHA, FACHE, CEO Moore County Hospital

Concerro’s Commitment to Excellence Aligns with Magnet®

A commitment to excellence is the foundation upon which Concerro has been built. Concerro’s products and services are strongly influenced by the belief that

achieving effective and sustainable results spring from addressing underlying cause not treating symptoms. This fresh approach that Concerro takes to staffing and scheduling is aligned with and embraces the Magnet® philosophy and 5 categories of excellence defined in the Magnet Model®.

“Excellence in staffing, productivity and high performance are inseparable. This growing understanding among healthcare executives is placing excellence in staffing at the center of top strategic initiatives.”

Kathy Douglas, RN, MHA, CNO, Concerro, Inc.

1. Transformational Leadership

Transformational leaders are today’s leaders who are able to transform their organizations values and beliefs and set forth a vision for the future. They inspire change by creating the environment and commitment necessary to achieve their vision. The transformational leader goes beyond problem solving, fixing broken systems and empowering staff. They are willing to lead people away from the familiar, make room for innovation, and manage the experience of destabilizing periods to achieve breakthroughs.⁴

Transformational leaders will appreciate the approach Concerro has taken to staffing and scheduling. Rejecting over-built, inflexible, command-and control-solutions that are labor intensive, poorly adopted and riddled with hidden costs. Concerro is changing the way healthcare consumes technology by introducing a new model of **Software AND Service**.

This new model combines, into one offering, the benefits of modern web technology with the support and services that guide the successful transformation to effective and efficient hospital staffing. This approach allows organizations to conserve cash, avoid capital investments, and ensure costs are predictable with no hidden surprises or overruns. In addition, they gain rapid implementation and adoption, and a fast track to impact results. It also shifts the majority of the burden of implementing and

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maintaining software away from the hospital allowing hospital resources to focus on their primary purpose, delivering excellent patient care.

The “Software” portion of Software AND Services is Shift Select®, and the “Services” portion is Concerro Consult®. As an integrated part of the Concerro offering Concerro Consult® creates a bridge between the hospital leadership and a wealth of service experience and knowledge. Together this forms a partnership well-equipped to successfully navigate the transformation to staffing excellence.

Shift Select®, Concerro’s core staffing technology, is designed around the concepts of shared responsibility, participation and empowerment at each step along the staffing continuum. Organization-wide understanding of staffing and access to the real time status of staffing within and across units and facilities promotes new levels of responsiveness to staffing needs. The resulting environment transforms staffing into a collaborative and inclusive process. Magnet® evaluators expect and look for these environments.

Optimizing communication with staff and the productivity of staffing that results from using Shift Select® to manage all core and open shifts, brings predictability and consistency to the staffing process. Manager productivity improves and more time can be placed on overseeing the delivery of safe and high quality care.

Living the categories of excellence demands the use of data. Practices must be grounded in evidence and staffing is no exception. Managers and leaders alike can use Shift Select’s® reports to monitor performance and productivity and can identify areas that need special attention or interventions. Manager dashboards bring essential data to the point of decision making, empowering evidence-based, effective decisions. Through Concerro Consult®, organizations receive monthly reports that include an analysis and recommended actions for on-going optimization. Annual reports provide benchmarking data so organizations can compare their performance to other organizations.

“The time I spent scheduling dropped from more than five hours a week to just minutes a day.”

Kirsten Boyd, Nurse Manager, Beth Israel Deaconess

“The manager can focus on being out on the unit with the patients and co-workers, not sitting in an office making telephone calls.”

Bruce Weinberg, Executive Director of Nursing, St. John’s Mercy Medical Center

2. Structural Empowerment

Structural empowerment brings to life environments in which professional practice flourishes. Staff are developed and empowered to do their part in achieving goals and desired outcomes.⁴ Shift Select® is built upon an architecture of participation, shared responsibility and accountability for staffing which is seamlessly designed into the flow of staffing activities.

Shift Select® provides transparency into the state of staffing organization-wide. Through web technology nursing leaders, managers and staff have access to staffing needs, schedules and related information from any Internet location at work or home at any time. This visibility results in a new level of awareness that fosters the breaking down of unit-centric attitudes. Instead, optimal organization-centric cultures develop and thrive.

This approach to staffing empowers staff to be active participants in organization-wide staffing and scheduling activities. Shift Select® supports the Magnet® value of decentralized decision making. Staff can view and request shifts that are both within their home unit and in any other unit in which they are qualified to work. A sophisticated checks and balances infrastructure, with gradual phasing, seamlessly verifies the qualifications and competencies of staff and the appropriate match with the requirements of available work. Alerts inform staff and managers when a work request falls outside pre-defined safe staffing criteria or when overtime or incentives are present supporting informed staffing decisions.

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Confirmed by an analysis of organizations nationwide, through empowerment and choice, qualified staff frequently self-select to work outside their home unit to fill open shifts and balance the use of talent across the organization. Data analyzed for the year 2008 included 182 facilities ranging in size from 25 to 979 licensed beds, with 22 states represented. The data indicates that RN's choose to float off of their home unit, when selecting open shifts, an average of 25%; for non-RNs, it is even higher – 40%.⁶ Supporting personal and professional growth and development, self-directed floating allows staff to try new areas and develop new skills. At the same time, they broaden their network from their home unit and create a community across the entire organization. By providing structure, consistency and fairness, organizations have achieved new levels of staff engagement and are driving quality, staff satisfaction and the retention of talent.

Assuring the appropriateness and quality of staffing decisions, Shift Select® seamlessly verifies the skills, competencies, qualifications and certifications of staff and maps them to unit needs in order to determine their eligibility to work supporting quality and safety outcomes.

Through the combination of Software (Shift Select®) AND Services (Concerro Consult®), organizations working with Concerro are supported with the Magnet® forces grouped under the Structural Empowerment category. These forces call for flat organizational structures, decentralized decision making and policies and programs that offer creative and flexible staffing models that support safe and health work environments.⁴ Magnet organizations enjoy the benefits of solid structures, excellent processes, stable relationships and an empowered culture, all of which converges to improve patient, workforce and organizational outcomes.

"It has really given the accountability and flexibility back to the staff."

Martha Allen, Clinical Manager of Operations, Clarian Health Partners

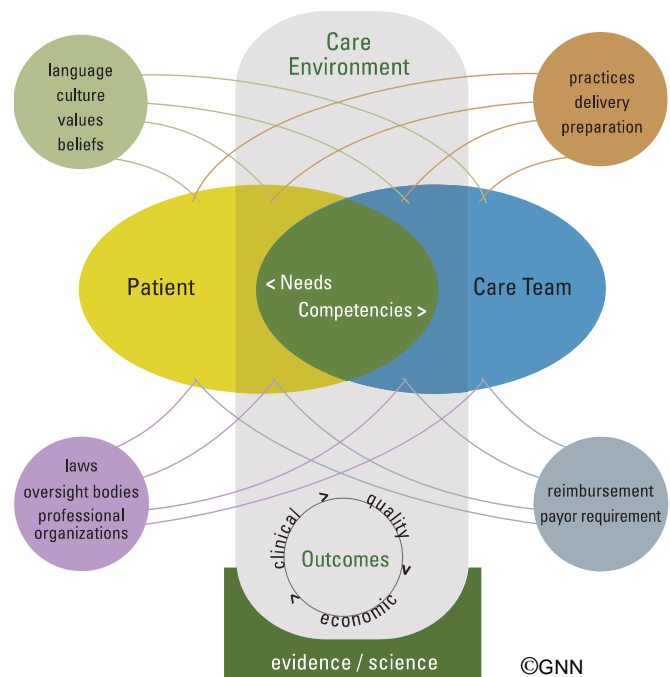
"We've been pleased with the degree of cross-unit activity seen through use of Concerro, and have seen a tremendous increase in staff willingness to work on different nursing units."

Jan McCoy, VP of Patient Care Services, Cape Canaveral Hospital

3. Exemplary Professional Practice

Excellent organizations deliver care that considers the unique needs of a patient as well as the continuity necessary to achieve optimal outcomes.⁴ Delivering quality patient-centric care takes more than a model of care: it takes a staffing model that is based in evidence and an environment in which nurses have the authority and ability to use independent judgment.

Using an evidence-based model for staffing moves staffing from an opinion-based practice to one grounded in science and brings staffing into alignment with professional practice.



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In addition to designing technology solutions supported by evidence-based staffing at each step, Concerro's commitment to evidence-based staffing was demonstrated in sponsoring, in conjunction with ANCC® and STTI®, an event of national healthcare leaders with operational, academic, and professional organization representation who together developed a model for evidence-based staffing. Concerro later donated the work to the not-for-profit Global Nursing Network.

Professional practice flourishes in environments where individuals are actively engaged and where interdisciplinary relationships and collaboration are common practice. Concerro Consult® has assisted organizations throughout the country in the development and implementation of an evidence-based model for staffing and achievement of the exemplary professional practice category of excellence.

“Concerro has driven staffing accountability to the front line where it should be, which supports our professional practice model of shared governance.”

Sherry Danello, Vice President, Patient Care Services, St. Joseph's/Candler

4. New Knowledge and Improvements

The category of new knowledge and improvements highlights the ethical and professional responsibility to contribute evidence and innovations to the nursing profession, to patient care and to the organizations in which care is delivered.⁴ This category of excellence acknowledges that there is still much to learn and calls for structures and processes that support and enable on-going advancements.

We must be equipped to respond to the many variables, internal and external, that are constantly shifting and influencing an organization's ability to deliver safe and effective care. The nursing shortage is a prime example.

Predictions that by 2020 there would be a shortfall of RNs by 1 million FTE are now outdated. In his 2009 paper “The Recent Surge in Nurse Employment: Causes and Implications” Dr. Buerhaus suggests that the continuing recession will ease or even end the current RN shortage in many areas, temporarily. He points out that the recession has strengthened the nursing workforce and eased the shortage of hospital nurses for the immediate future. However, he also raises the concern that in light of the present relief it may be tempting for employers and policy makers to turn away from RN workforce initiatives and focus on other issues. But future workforce demands continue to loom and unless we focus on underlying issues, like education capacity, the relief we are experiencing will be short lived.⁷

Demonstrating excellence in the Magnet® category of New Knowledge and Improvements requires staying abreast of new and changing information and integrating new findings into strategies and practices. Concerro's commitment to sharing ideas, knowledge exchange, to staying abreast of the changing landscape, and to surfacing new research findings has resulted in two open forums: IdeaConnect and IdeaConnect2. IdeaConnect provides monthly webcasts to hundreds of nurse and healthcare leaders on a wide range of current staffing topics. Presentations range from professional speakers like Peter Buerhaus, Leah Curtin and Karlene Kerfoot to a nurse leader giving her/his first public talk. This forum is open to the public and is used to share experience, ideas, innovations and research related to staffing. IdeaConnect2 is an on-line community where a library of IdeaConnect webcasts is available for viewing as well as blogs and discussion groups on relevant staffing topics. Anyone is welcome to participate, to join the community go to www.ideaconnect2.com.

“We saved 2 million dollars in staffing costs we would have incurred if we had not engaged in this process”

Kathryn Raethel, MHA, MPH, RN, CNO, Castle Medical Center

5. Empirical Quality Results

Commitment to quality is the driving force through which excellence is achieved. Structure and processes must be in place to enable the measuring and utilization of quality data. Meaningful findings must be integrated into practice to improve clinical, workforce, patient and consumer outcomes. Excellence in staffing using an evidence-based model has a key role in achieving the outcomes that result from an organizations commitment to excellence. The Concerro program adds tools that don't just monitor results but also put the empirical processes in place to improve results.

“With the data that Concerro technology has brought to us we’ve been able to look back and make changes in areas that were seen to have weaknesses”

Michael Malecki, Critical Care Director, Garden City Hospital

Conclusions

The five categories of excellence form the overall structure for organizations to achieve Magnet® designation. At Concerro, we believe that excellence and Magnet® designation form the fundamental path to achieving productivity and performance in healthcare organizations. We have had the opportunity to work side-by-side with organizations who have made the commitment to bring excellence into the area of staffing. The outcomes and efficiencies they have achieved have been remarkable. We often imagine how different the financial and operational healthcare landscape would be if all hospital leaders were to fully embrace the path to excellence.

“Concerro’s commitment to excellence goes far beyond technology. Their investments in people, education and collaborative innovation benefit not just Main Line Health but the nursing profession and healthcare as a whole.”

Nancy Valentine, PhD, DSc(h), MPH, RN, FAAN, FNAP, Corporate CNO, Main Line Health

¹ Kutney-Lee, Ann et al, Nursing: A Key to Satisfaction, Health Affairs 28, 2009

² Ward, William, J., Sprangens, Lynn, Smithson, Ken, Buliding the Business Case for Clinical Quality, HFM, December 2006

³ Needleman, Jack The Role of Nurses In Improving Hospital Quality And Efficiency: Real World Results. Health Affairs 28, 2009

⁴ ANCC website

⁵ Douglas, Kathy, et al. Excellence and Evidence in Staffing: Essential Links to Staffing Strategies, Design and Solutions for Healthcare.2008

⁶ Douglas, Kathy, Pledger, Rachel, Schulman, Cheryl, Flexibility and Chocie Fule Workforce Trend; Self-Directed Floating. RN, May 2009

⁷ Buerhaus, Peter, Auerbach, David, Staiger, Douglas, The Recent Surge In Nursing Employment: Causes and Implications, Health Affairs – Web-Exclusive 2009

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