



# Impact Wellbeing™ Guide

*Taking Action to  
Improve Healthcare  
Worker Wellbeing*



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## Revision

Updated the link on pg 44 to direct users to the revised version of the Dr. Lorna Breen Heroes' Foundation toolkit to Remove Intrusive Mental Health Questions from Credentialing Applications.

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# Table of Contents



# About the *Impact Wellbeing Guide*

As hospital leaders and executives, you care about your *healthcare workers* and want to build a health system where they can thrive. Improving *professional wellbeing* for all healthcare workers drives the success of hospital systems – from staff morale to ensuring a safe work environment for both healthcare workers and patients. Focusing on professional wellbeing can influence the perception of your hospital as a desirable place to work. In turn, it also improves staffing through better recruitment and retention.

Ultimately, you want those at your hospital to work in a safe and supportive environment. Many hospitals face challenges though when it comes to finding additional time, funds, and staff for professional wellbeing work. With this in mind, the National Institute for Occupational Safety and Health (NIOSH) designed the *Impact Wellbeing Guide: Taking Action to Improve Healthcare Worker Wellbeing (“the Guide”)* to support workplace improvements in any system. Using this Guide will help you to accelerate or supplement your work on professional wellbeing no matter where you are in your journey.

The Guide provides concrete steps you can take to carry out the broader recommendations from the U.S. Surgeon General and National Academies of Medicine.<sup>1,2</sup> It builds upon existing research and resources to improve healthcare worker wellbeing, as well as NIOSH’s 50 years of occupational safety and health expertise. It was informed by conversations with nearly two dozen organizations including professional organizations, academic institutions, unions, and federal agencies. Most importantly, the Guide was real-world tested in six hospitals across the United States. The authors then revised for greater clarity and a wider range of tools and resources.

*For more than 50 years, NIOSH has empowered employers, including hospital leaders, with the strategies and resources critical to creating sustainable, safe workplaces. From the Total Worker Health® program to the NORA Healthcare and Social Assistance Sector Council, NIOSH is at the forefront of working with hospital leaders, healthcare workers, and researchers.*

THE GUIDE HAS TWO GUIDING PRINCIPLES, including using a systems-first approach to improve wellbeing and building trust between leaders and healthcare workers.

# 1

## Use a Systems Approach

According to the U.S. Surgeon General’s Advisory on Building a Thriving Health Workforce, a range of structural and cultural factors contribute to burnout, such as

- Mental health stigma,
- Unrealistic expectations placed on healthcare workers, and
- Limitations from national and state regulations.<sup>1</sup>

Programs and resources for individuals offer a strong starting point to support healthcare workers, and these are still valuable. However, collaborative efforts must go beyond only encouraging self-care and personal resilience and focus on operational-level improvements. Addressing workplace policies and practices is the best way to reduce burnout and support the professional wellbeing of workers.<sup>3</sup> It can help optimize patient outcomes and address costs associated with staff turnover, lost revenue, and threats to a hospital’s long-term viability.<sup>2</sup>

# 2

## Build Trust

A 2023 NIOSH study found that health workers who were able to participate in workplace decisions and who trust management were less likely to feel burned out.<sup>4</sup> The same study showed that trust in management was substantially lower in 2022 compared to 2018.<sup>4</sup> There is a real need to strengthen relationships between hospital leaders and healthcare workers.

By moving through the Actions in the Guide, you will lay the foundation for this trust with your staff by listening to their experiences and involving them in decisions around wellbeing efforts. Each Action builds upon itself with recommendations for two-way communication to create transparency and ensure that healthcare workers feel heard.

The Guide provides the necessary background and tools to support your efforts, from quick checklists to communication strategies to talking points. Professional wellbeing is a long-term and iterative commitment. The Guide gives hospital leaders across the country the foundation to enact new or revise existing procedures at the operational level.

# How to Use the Impact Wellbeing Guide

Improving the professional wellbeing of healthcare workers requires hospital leaders to act collaboratively. Though partnering with other leaders and staff at your hospital is vital to informing this effort, operational change that improves ***wellbeing*** must start with executive leadership like you, as you have the biggest capacity and responsibility to make systems-level changes.

## The Role of Executive Leadership

**This Guide was developed for executive-level hospital leaders, including:**

- Chief Executive Officers
- Chief Medical Officers
- Chief Nursing Officers
- Chief Human Resources Officers
- Chief Quality Officers
- Chief Wellbeing Officers

One executive level leader should be identified to serve as the ***Executive Sponsor***. The Executive Sponsor will act as a coordinator and strategic lead of the Actions outlined in the Guide. As Executive Sponsor, you are not expected to accomplish the Actions on your own as you'll need to collaborate with hospital staff and colleagues as you move forward through the Guide's Actions (further details outlined in *Action 2: Build Your Professional Wellbeing Team*).

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## Moving Through the Actions

The Guide includes six evidence-informed Actions to improve professional wellbeing of all healthcare workers, no matter title or department, and strengthen hospital operations. Each Action offers useful background information and resources/tools to fully equip you to accomplish it. Use the ***Glossary of Key Terms*** as a helpful reference. Key terms from the Glossary are bold, italicized, and underlined at first mention throughout the Guide.

**Each Action starts with a quick overview:**

- Brief description of the purpose
- Key concept,
- Action items,
- Expected outcome(s), and
- Outline of the resources/tools provided.

After the overview, each Action has more detail about the key concept and action items. Each resource has short instructions on how to effectively use the tools provided. These tools are designed

to help you complete all six Actions within six months, ending with a long-term wellbeing plan so that your team can sustain efforts over time.

**Using the resources provided in this Guide, you will be able to:**

- 1** Conduct a review of your hospital's operations to determine how they support professional wellbeing.
- 2** Build a dedicated team to support professional wellbeing at your hospital.
- 3** Break down barriers to seeking help, such as updating and removing intrusive mental health questions on ***credentialing applications*** and offering confidential mental health support options.
- 4** Develop a suite of communication tools that help you share updates with your workforce about your hospital's journey to improve professional wellbeing.
- 5** Integrate professional wellbeing into an existing ***quality improvement project*** at your hospital.
- 6** Create a 12-month plan to continue to move your workforce's professional wellbeing work forward.

Although your hospital may have already started taking some of these Actions, it is important to review each one carefully, and in order, to make sure your efforts are comprehensive. Along the way you may encounter questions from colleagues or staff about why this is the best approach. The ***Frequently Asked Questions*** tool can help you through those conversations.

## Actions in This Guide



**Action 1:**  
Review Your Hospital's Operations



**Action 2:**  
Build Your Professional Wellbeing Team



**Action 3:**  
Break Down Barriers for Help-Seeking



**Action 4:**  
Communicate Your Commitment to Professional Wellbeing



**Action 5:**  
Integrate Professional Wellbeing into Quality Improvement



**Action 6:**  
Develop Your Long-Term Professional Wellbeing Plan

# Acknowledgments

The National Institute for Occupational Safety and Health and the Dr. Lorna Breen Heroes' Foundation created the *Impact Wellbeing* Guide with support from several organizations and individuals.

We would first like to recognize CommonSpirit Health, including CHI St. Vincent Infirmary, CHI St. Vincent Hot Springs, CHI Saint Joseph Hospital, CHI Health-Creighton University Medical Center-Bergan Mercy, CHI Health Mercy Council Bluffs, and CHI Health Lakeside, who tested the Guide's content and elements. Their feedback has been essential in shaping these materials and ensuring they are applicable in real-life hospital settings. We are grateful for their participation in this effort and commitment to improving the professional wellbeing of not only their own workforce but of those across the nation.

The Guide builds on the work of many organizations who have made strides to address healthcare worker burnout. We would like to extend our appreciation to the following organizations, whose resources and expertise have been invaluable in developing the Guide. We thank them for their dedication to reducing burnout and strengthening the wellbeing of healthcare workers.

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- ALL IN: Wellbeing First for Healthcare
  - American Association of Critical-Care Nurses
  - American Federation of Teachers
  - American Hospital Association
  - American Medical Association
  - American Nurses Association, including the American Nurses Credentialing Center Pathway to Excellence Program
  - Collaborative for Healing and Renewal in Medicine
  - Health Action Alliance
  - Institute for Healthcare Improvement
  - National Academy of Medicine Action Collaborative on Clinician Well-Being and Resilience
  - Service Employees International Union
  - The Office of the Surgeon General
  - The Physicians Foundation
  - Workplace Change Collaborative







# Dedication

NIOSH and its partners dedicate the *Impact Wellbeing* Guide to our nation's healthcare workforce in recognition of the sacrifices they make every day, to those who have experienced injury or illness related to your work, and to those who have lost their lives while caring for patients.

This evidence-informed Guide was developed with healthcare workers and their wellbeing at the center. Its purpose is to provide hospital leadership with the necessary, actionable tools that remove unintentional systems barriers at your hospital to reduce burnout.

Every day, people across the country place their lives in the caring hands of healthcare workers, and we extend gratitude for the sacrifices they make to take care of us, and hope this Guide serves to help you.

Thank you for keeping us healthy. Thank you for caring for us. Thank you for being healthcare workers.



**Dr. John Howard,  
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Director of the National  
Institute for Occupational  
Safety and Health



**Dr. Stefanie Simmons,  
MD, FACEP**

Chief Medical Officer at  
the Dr. Lorna Breen Heroes'  
Foundation

# Glossary of Key Terms

The following list includes definitions for key terms used frequently throughout the Actions within this Guide.

**Attestation Model:** An approach to improving the provider credentialing process by using more supportive language around mental health and decreasing stigma associated with seeking or receiving mental health care.<sup>5</sup>

**Burnout:** A workplace syndrome characterized by high emotional exhaustion, high depersonalization (i.e., cynicism), and a low sense of personal accomplishment from work.<sup>6</sup>

**Communication Plan:** A communication plan describes how you will communicate key information to specific audiences. The plan includes goals, key messages, timing, and an explanation of how you will measure the reach and impact of your communication efforts.<sup>7</sup>

**Credentialing:** A process within hospital systems to ensure that healthcare workers have the qualifications, training, and licensing to provide high quality patient care.<sup>8</sup>

**Credentialing Applications:** Any application, peer review, addendum, or other form that a healthcare worker must complete for credentialing.<sup>8</sup>

**Current Impairment:** A term used in credentialing applications to assess differences in a healthcare worker's physical or mental functioning.<sup>9</sup>

**Executive Sponsor:** A hospital Executive Team member who is on the Professional Wellbeing Team and will lead strategic planning sessions, ensure ongoing leadership support for professional wellbeing initiatives, and eliminate barriers from interfering with the team's progress. The senior executive acts as a champion, as with other workplace health promotion programs.<sup>10</sup>

**Executive Team:** C-suite and other senior leadership such as Chief Safety Officer, Chief Medical Officer, Chief Nursing Officer, and Chief Wellbeing Officer.<sup>11</sup>

**Health Equity:** The state in which everyone has a fair and just opportunity to attain their highest level of health.<sup>12</sup>

**Healthcare Worker:** Staff working in a hospital or other setting where patient care and services are provided. This term encompasses medical professionals as well as support staff such as administrators, technicians, and anyone else who contributes to the operations of healthcare delivery.<sup>13</sup>

**Key Performance Indicator:** Measurable information used to determine if a program is implemented as expected and making progress towards intended outcomes.<sup>14</sup>

**Moral Injury:** Being forced to act or witnessing action in such a way that violates a person's moral code.<sup>15</sup> Moral injury is distinct from other forms of distress or pain, including burnout.<sup>16</sup>

**Professional Wellbeing:** A "function of being satisfied with one's job, finding meaning in work, feeling engaged at work, and finding professional fulfillment in work."<sup>17</sup> Throughout this document, the term "professional wellbeing" applies to all healthcare workers.

**Professional Wellbeing Measures:** Measurable indicators of the outcomes of a project or program that include leading, lagging, or direct measures of professional wellbeing.<sup>18</sup>

**Professional Wellbeing Plan:** A long-term plan with specific, measurable goals that are aligned with an organization's priorities to improve wellbeing. It is similar to a workplace health improvement plan but with a narrower scope.<sup>19</sup>

**Professional Wellbeing Team:** A cross-department, multi-disciplinary group, convened by an Executive Sponsor, to lead the charge of improving professional wellbeing in your hospital. This group is also sometimes called a wellbeing task force.<sup>20</sup>

**Professionalized Leadership Position:** An employment arrangement where a person is compensated for their time to lead.<sup>21</sup>

**Protected Time:** Designated portion of your employment that is covered to focus on nonclinical work.<sup>22</sup> This may take the form of an allocated percentage of full-time employment or a dedicated stipend.<sup>23</sup>

**Quadruple Aim Quality Improvement:** The Institute for Healthcare Improvement's Quadruple Aim approach adds a fourth dimension to healthcare improvement – the experiences of those providing healthcare services. The four elements focus upon improving patients' lives through providing excellent patient experience, achieving great medical outcomes, ensuring efficient care on a population level, and it also measures the impact on the workforce.<sup>24</sup>

**Quality Improvement Project:** A project that hospital leaders or healthcare workers can implement with an intervention designed to improve hospital quality.<sup>25</sup>

**Quintuple Aim Quality Improvement:** The Quintuple Aim approach to quality improvement adds a fifth element to advance health equity, building off the Quadruple Aim model. The fifth aim addresses social determinants of health and disparity reduction as key to meaningfully shift quality improvement efforts to reflect greater population needs.<sup>26</sup>

**State Licensure Applications:** To practice medicine within any state, healthcare workers including physicians, nurses, and physician associates must complete an individual application for a state medical license specific to the state where they seek to practice.<sup>27</sup>

**Stigma:** The cultural beliefs and attitudes that impact a person's willingness to seek and access care for mental health and/or substance use disorders.<sup>28</sup>

**Triple Aim:** The Institute for Healthcare Improvement's Triple Aim approach focuses on improving patients' lives through providing excellent patient experience, achieving great medical outcomes, and ensuring efficient care at a population level.<sup>29</sup>

**Wellbeing:** "A state in which people perceive their lives as going well, including aspects of their physical, emotional, and psychological health, productivity, and economic well-being."<sup>1</sup>



# 1

## Review Your Hospital's Operations

Action 1



Action 3



Action 5



Action 2



Action 4



Action 6

# Action 1:

## Review Your Hospital's Operations

### Purpose:

The purpose of Action 1 is to connect with colleagues within your organization to gather information about current efforts that support healthcare workers' wellbeing. Capturing this information is an essential and foundational step to implementing the Guide at your hospital so you can build on existing wellbeing work and avoid duplication.

### Key Concept

Reviewing your hospital's current operations is the first step to understanding how your hospital supports the wellbeing of healthcare workers. This Action equips you with a high-level summary of efforts already underway, so you are not duplicating energy and resources.

### Action Items

- Complete the [Hospital Review Worksheet](#) to document a high-level summary of existing hospital operations and systems that support professional wellbeing. Record the outcomes of your review.

### Expected Outcome

- Completed review of current hospital operations that identifies how current workflows and systems are intended to support professional wellbeing.

### Resources Provided

- Hospital Review Worksheet

## About the Hospital Review

Implementing effective workplace policies and practices is the best way to reduce burnout and support healthcare workers' wellbeing.<sup>2,3</sup> It also optimizes patient outcomes and addresses costs associated with staff turnover, lost revenue, and threats to a hospital's long-term viability.<sup>2</sup>

It is critical to understand who and what is already contributing to a positive workplace culture, engaged workforce, and high-quality, safe patient care. You and the rest of your ***Executive Team*** need this information before you implement or revise operational changes to address professional wellbeing.

Many hospitals have made strides to support and

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A win for us was just putting our eyes on all the different things we have going on and being able [to] highlight some of the missing pieces that we desperately need.

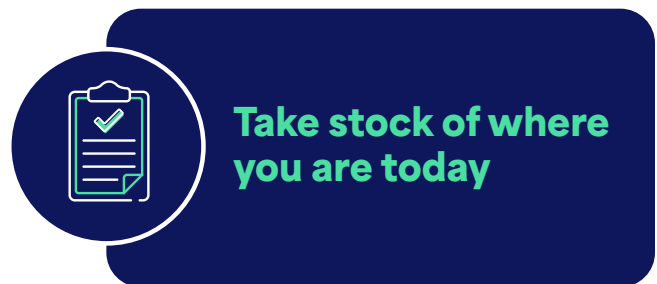
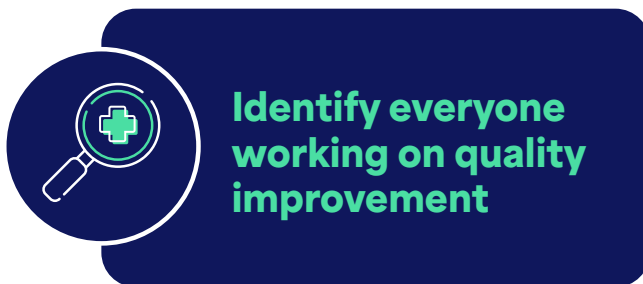
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improve healthcare workers' wellbeing, but often these efforts are not centrally coordinated. Conducting a review of your current system helps you establish a baseline summary of efforts already underway, so you are not duplicating energy and resources. Like assembling a puzzle, the review helps hospitals identify what pieces they have, and which are missing, while not knowing yet what the full picture will look like. The findings from the review will guide your efforts as you implement Actions 2-6 later.

## How to Conduct Your Review

Here are two steps you can take to better understand how your workflows and systems are currently supporting professional wellbeing.



To be efficient, start the hospital review as soon as possible. You may have to reach out to colleagues who will then refer you to others. Clinicians and other hospital staff can help provide a new perspective on current operations as they may have a different opinion from those in leadership positions. Making these connections and gathering the input you need from the right people can take time but will yield the most complete results so that you are building on the most accurate and up-to-date information.

While you may need to reach out to others in your organization, this step is not meant to take a significant amount of time. Rather, the intention is to document the foundational activities and resources that may contribute to wellbeing efforts in your hospital moving forward.

### Identify Everyone Working on Quality Improvement

To capture all the activities underway, engage department leaders and healthcare workers who oversee quality improvement initiatives or wellbeing programs at your hospital. Consider reaching out to your hospital leadership, including a Chief Wellbeing Officer, if applicable, Chief Quality Officer, Chief Medical Officer, and other leaders. It is also important to engage staff who work in departments related to employee health and safety to identify if they have ongoing projects related to professional wellbeing. These important positions will likely also play a role going forward, specifically as you build your ***Professional Wellbeing Team*** (see **Action 2: Build Your Professional Wellbeing Team** for more details).

**Note:** Set up one-on-one, in-person or virtual meetings with the people working on quality improvement to hear first-hand what efforts are already underway at your hospital.

## Take Stock of Where You Are Today

Once you identify the people who may already be doing wellbeing work, use the [Hospital Review Worksheet](#) to collaborate with them to capture your organization's information. Informed by the U.S. Surgeon General's [Advisory on Building a Thriving Health Workforce](#), the review determines whether your health system has:<sup>1</sup>

- 1 Stated a commitment to supporting the health and safety of its workforce.
- 2 Established a Professional Wellbeing Team.
- 3 Assessed which ongoing quality improvement initiatives include **key performance indicators** related to fostering a healthy workforce.
- 4 Defined operational improvement goals.
- 5 Ensured policies, credentialing applications, and other forms do not include intrusive questions that deter healthcare workers from seeking care.
- 6 Provided easy access to mental health support.
- 7 Fostered community and connection among healthcare workers.
- 8 Addressed bias, racism, and discrimination in the workplace.
- 9 Implemented prevention efforts that promote **health equity**.
- 10 Developed a long-term **Professional Wellbeing Plan**.

As a leader, you are well-positioned to address these 10 areas to further demonstrate that you value your healthcare workers. It also shows you are working to reduce stress, burnout, and intentions to leave their roles in healthcare.<sup>1</sup> During your review, keep in mind that while healthcare worker wellbeing can positively impact efficiency of care, patient outcomes, and patient experience, it is still important even if it did not affect those factors.



The worksheet is giving us a roadmap for putting together a more cohesive wellbeing-focused program. The worksheet was helpful in providing us a way to take stock of where we are now.

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## Moving Forward

Once you complete your [Hospital Review Worksheet](#), you can move to Action 2. Take your findings into Action 2 as you establish your Professional Wellbeing Team. This group is meant to help your system think differently about how to maximize existing resources, fine-tune current processes, and/or establish new processes. Encourage them to refer to this worksheet along the way to help ensure your hospital is prioritizing efforts that will yield the greatest impact.



## How to use this worksheet:

- Use the following worksheet to review and record how your existing hospital operations support your healthcare workers' wellbeing.
- Respond to the easy-to-answer questions (yes/no/in progress). The worksheet also provides space to include a more detailed account of your hospital's current efforts, which will help you as you move along in the Guide.
- Include contact information, if applicable, for leaders or workers who oversee these operations or helped you capture this information.
- Consider bringing in others during the review – like clinicians and other staff – who can help share their perspective on current operations as they may have a different opinion from those in leadership positions.

### 1. Does your hospital's highest level of leadership have a stated commitment to protecting healthcare workers' wellbeing?

Yes     No     In Progress

**Hospital Point of Contact** (if applicable):

*(Include Name, Title, Contact)*

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**Notes:** (Include links to internal resources, public statements)

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**2. Does your hospital already have a team of people working to develop and implement operational changes that support healthcare workers' wellbeing? This team may also work on operations and system elements not necessarily identified as direct wellbeing activities, but that influence wellbeing, nonetheless.**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
*(Include Name, Title, Contact)*

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**Notes:** (Describe existing team, their roles, responsibilities, and current efforts underway)

**3. Does your hospital have a defined list of professional wellbeing improvement goals?**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
*(Include Name, Title, Contact)*

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**Notes:** (List goals)

**4. Do your hospital's quality improvement initiatives include measures related to healthcare workers' professional wellbeing? Examples include, but are not limited to, existing initiatives to address staffing, violence prevention, and harassment prevention.**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
*(Include Name, Title, Contact)*

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**Notes:** (List key performance indicators related to professional wellbeing)

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**5. Has your organization reviewed and revised your credentialing applications and other policies to remove questions or language that deter healthcare workers from seeking appropriate mental health care?**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
*(Include Name, Title, Contact)*

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**Notes:** (Describe revisions and provide revised language)

6. Does your organization ensure that healthcare workers have access to free, accessible, high-quality, confidential mental health care? (This could be covered through out-of-network care, via telemedicine, or by allocating time for staff to access support through channels that ensure their privacy – such as an Employee Assistance Program or other counseling resources.)

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
(Include Name, Title, Contact)

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**Notes:** (Describe resources available)

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7. Does your hospital offer peer support programs or other community-building programs to mitigate burnout and feelings of loneliness?

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
(Include Name, Title, Contact)

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**Notes:** (Describe existing peer support programs or other programs, including their purpose, how to participate, and current engagement)

**8. Does your hospital have discrete programs in place to promote healthcare worker diversity, equity, inclusion, and accessibility in the workplace?**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):

*(Include Name, Title, Contact)*

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**Notes:** (List resources and describe existing efforts)

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**9. Does your hospital have a process for healthcare workers to voice concerns about the societal and environmental factors that impact the health and safety of themselves or their patients? Societal and environmental factors may be related to social determinants of health, structures for worker and patient support, safety, and more.**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):

*(Include Name, Title, Contact)*

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**Notes:** (Describe existing processes, provide contact information for how healthcare workers report concerns)

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**10. Does your hospital have a Professional Wellbeing Plan, including implementation strategies and approaches for professional wellbeing, over the next year and beyond?**

Yes     No     In Progress

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**Hospital Point of Contact** (if applicable):  
(Include Name, Title, Contact)

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**Notes:** (Link to Professional Wellbeing Plan, including any draft plans in place)

**Continue to address the Guide's Actions in sequential order,** regardless of your answers to the above questions. This ensures that your hospital's wellbeing work is addressed comprehensively.



# 2

## Build Your Professional Wellbeing Team

Action 1



Action 2

Action 3



Action 4

Action 5



Action 6

# Action 2:

## Build Your Professional Wellbeing Team

### Purpose:

The purpose of Action 2 is to assemble a Professional Wellbeing Team that will lead efforts in your hospital in support of professional wellbeing.

### Key Concept

Building a Professional Wellbeing Team ensures that executive leadership commits time and resources to protect, improve, and sustain the professional wellbeing of healthcare workers. Building this team keeps professional wellbeing centered in your hospital's operations without putting the work only on one position or department. It also serves as a dedicated resource to assess and address working

conditions, implement an action plan, and communicate progress to leadership and staff.

### Action Items

- Choose the structure that's right for your hospital to build your Professional Wellbeing Team.
- Build your Professional Wellbeing Team.
- Set norms and expectations with your team.

### Expected Outcome

- Established a Professional Wellbeing Team to help implement and sustain short- and long-term systems goals that are known to positively impact professional wellbeing.

### Resources Provided

- Professional Wellbeing Team Roles Chart
- Committee Charter Worksheet

## About Your Professional Wellbeing Team

Convening a cross-department, multi-disciplinary team to lead the charge of improving healthcare workers' professional wellbeing in your hospital is essential. It assures that there is protected time and executive-level support for this important effort. It also ensures that the perspectives of all departments are factored into the team's work. In general, a Professional Wellbeing Team Chair or Leader should have at least .50 full-time equivalent (FTE) protected time for this role, and all other team members should have at least .10 FTE.<sup>30,31</sup> These FTE goals are aspirational and should be planned and worked on for over a year. Please note, these time allocations are provided as guidance and may vary based on the needs of different hospitals.

### What Is a Professional Wellbeing Team?

A Professional Wellbeing Team is convened to develop and implement operational changes that support professional wellbeing. The team has shared governance between management and worker

representatives. This means that workers not only provide their input, but also have equal decision-making authority with management. Shared leadership is critical for building trust between leadership and workers. This approach effectively combines the organizational bird's-eye view of management with the ground-level insights of front-line workers.

It is essential that the Professional Wellbeing Team is inclusive and equity-focused. It should comprise members who are both passionate about professional wellbeing and experienced in administrative roles. Members should also represent departments and positions across all areas of hospital operations.

Ideally, it includes a team leader who holds a *professionalized leadership position*, meaning professional wellbeing is built into their job description. It is recommended that this person be compensated for their time on these efforts so this work can be sustained into the future.<sup>32</sup>

Establishing this team can help you keep professional wellbeing central to how your hospital operates. The Professional Wellbeing Team also provides dedicated staff to assess and address working conditions, implement an action plan, and communicate progress to leadership and your entire workforce. This team must have the authority to implement the items in the action plan.

Once assembled, this team will identify local factors that influence professional wellbeing. They will gather additional feedback from healthcare workers in different jobs around the hospital to ensure even more voices of the healthcare staff are included. The team and the Executive Sponsor are ultimately responsible for the implementation of any local, divisional, or system-wide initiatives. Moving ahead in this Guide, this team will be responsible for implementing Actions 3-6.



I think it gave us the building blocks to be able to get the assignment done and be able to be ready for the next steps.

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## Who Should Be on the Professional Wellbeing Team?

The Professional Wellbeing Team should ideally include a set of core members with at least one representative from each of the following groups:<sup>20</sup>

- 1 Executive leadership**, such as the Chief Medical Officer, Chief Nursing Officer, Chief Human Resources Officer, and other executive leaders.
- 2 Human Resources**, such as staff involved with coordinating benefits, wellness programming, and other personnel responsibilities.
- 3 Medical Executive Committee representative(s)**, such as department chairs from across the hospital.
- 4 Nursing Council representative(s)**, such as nurse leaders from across the hospital.
- 5 Employee Health and Safety departments**, including staff who work on ongoing wellbeing projects within these departments.
- 6 Representatives from other job groups**, including patient care technicians, facilities, custodial staff, and others.



- 7 **Diversity, Equity, and Inclusion teams**, such as key staff who are supporting efforts to promote inclusion and reduce *moral injury* and stress among healthcare workers.
- 8 **Patient Safety/Quality Improvement leaders**, such as those engaged in Action 1 to ensure your wellbeing goals align with efforts to improve hospital operations.
- 9 **Worker representatives**, such as union representative(s), if your hospital is unionized or non-management staff if your hospital is not. This might include staff with expertise in promoting professional development resources, continuing education, and wellness programming. This could also include staff who are passionate and invested in improving professional wellbeing and already commit time to do this work.

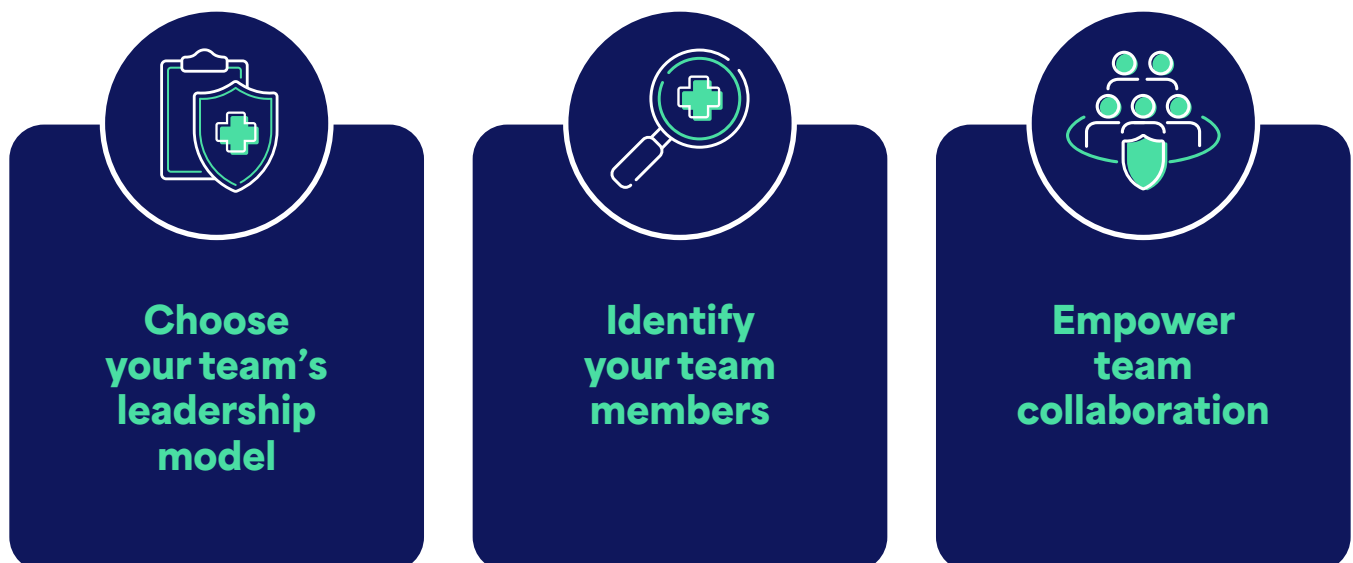
#### Additional Considerations:

- Note that the names and titles listed above may vary by hospital system but it's important to designate responsible executives at the hospital-level who can help spearhead this work, regardless of if their titles align exactly with those above.
- It is important to include someone with budgetary authority.
- The number of committee members should be large enough to represent all relevant areas and shifts of a worksite.
- To be most effective, there should be an equal number of worker and management members. Management and worker representatives should each appoint their own members to the committee.

Use the **Professional Wellbeing Team Roles Chart** to identify leaders and representatives who can serve on your team. If possible, it's beneficial to assign one person to each role so they can see it through from start to finish. When roles are shared, responsibility for the work may get diluted.

## How to Build Your Team

Here are three steps you can take to establish your Professional Wellbeing Team.



## Choose Your Team's Leadership Model

Not every hospital is alike, which is why there are a variety of effective leadership models to empower a matrix-designed team to move this important work forward. Regardless of the model, it may be necessary to create subcommittees and appoint subcommittee chairs to lead specific projects. Choose the model that best suits your hospital from the options listed below.

### Wellbeing Leadership Team Models

In each model, management and workers co-lead the Professional Wellbeing Team.

- **Executive Representative Co-Leadership:** In the ideal scenario, a Chief Wellbeing Officer is appointed with at least 50 percent of their time protected to lead wellbeing work, including leadership of the Professional Wellbeing Team. A worker representative (in a non-management role) serves as co-leader. Representatives from the list above function within the team to accomplish their work.<sup>33</sup> Unlike other traditional human resources positions, Chief Wellbeing Officers are concerned with one key issue: making professional wellbeing central to organizational culture and strategy.<sup>34-37</sup>

**Note:** Appointing a Chief Wellbeing Officer signifies to your workforce that wellbeing is equally as important as quality, safety, and overall performance of your hospital.<sup>38</sup>

- **Committee Co-Led by the Executive Team:** Not all hospitals are able to appoint or hire a Chief Wellbeing Officer. In this case, the Chief Medical Officer, Chief Nursing Officer, or another executive leader co-leads the Professional Wellbeing Team alongside a worker representative co-leader. A robust group of additional leaders and representatives from across your hospital staff provide support.
- **Committee with Shared Leadership:** In this model, there is no designated team leader. Rather, the team, comprising representatives from across departments, shares responsibility and holds each other accountable for getting the work done. In this model, it's especially important to have an equal number of worker and management members.

For hospitals without a Chief Wellbeing Officer, often a committee member from the Professional Wellbeing Team emerges as an acting Chief Wellbeing Officer for the hospital. Note that if this occurs in your hospital, the acting Chief Wellbeing Officer should be given protected time that allows them to effectively serve in this position. It also ensures the role is permanent. Regardless of the approach, every Professional Wellbeing Team must have an Executive Sponsor locally who ensures that the team can effectively implement the changes they seek to make. The Executive Sponsor is also important to ensure sustainability of the team through Action 6 and long term.

## Identifying Your Team Members

Once you've identified the right model for your hospital, use the [Professional Wellbeing Team Roles Chart](#). It will help you determine the appropriate leaders and representatives to be on your team.

This chart will help you identify and secure commitment from others to be part of your hospital's Professional Wellbeing Team. Remember, some of the people you learned from during Action 1 may be the perfect fit. Inviting people who currently lead efforts that support professional wellbeing to join your team helps ensure that the Professional Wellbeing Team uses and builds from this existing work. However, your final team should be inclusive, diverse, and represent all types of departments, roles, and positions across your hospital.



Normally when you form a team, you strategically think, 'Oh, this person would be great, this person would be very collaborative, [and so on].' You don't look at the team and go, 'I need somebody from quality, I need somebody from here, I need somebody from here.' So, [using the chart] gave us a very diverse group of people that maybe we might not have put in. If we were typically thinking about wellbeing, we might not have put [them] together.

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## Empower Team Collaboration

It is critical for the team to have a clear, defined purpose. Members must also align on the norms and expectations for how they will work with each other and how the team will work overall. Use the [Committee Charter Worksheet](#) to review norms with your team and establish roles and processes among your team members. The document serves as a starting point. You can adjust and/or amend as you and your members see fit based on your organizational capabilities and team structure.

**Note:** Use this sheet to guide a kickoff meeting with your team. Review it during your first meeting to determine what, if any, changes your team would like to make as you move forward with systems-level change. Ensure that you capture detailed minutes from your meetings. Share these with your team and your communication department as needed for future outreach.

## Moving Forward

With the foundational elements from both Actions 1 and 2, your team is now ready to continue your efforts towards systems-level changes that improve professional wellbeing of your healthcare workforce. To continue this momentum, move on to Action 3. It walks you through how to make it safe for your healthcare workforce to access mental health care should they need it.



## How to use this chart:

- Use the following chart to help you determine the appropriate leaders and representatives to be on your Professional Wellbeing Team.
- Include core members, with alternates assigned as applicable to reduce burden.
- Include as many roles as are appropriate to ensure equitable representation across departments. However, you do not have to identify roles for each box. Hospitals vary in size and complexity, so it may not be appropriate or feasible to include all of them.
- List names, titles, and contact information of the individuals who will fill these roles in the notes section.

Title	Responsibilities	Notes
<b>OPERATIONAL LEADERS</b>		
<b>Chief Wellbeing Officer</b>	<ul style="list-style-type: none"><li>• Advocates for initiation of wellbeing programs and implements wellbeing work throughout the hospital.</li><li>• Coordinates and leads the Professional Wellbeing Team; helps other team members implement wellbeing work.</li><li>• Tracks metrics related to wellbeing.</li></ul>	
<b>Chief Human Resources Officer</b>	<ul style="list-style-type: none"><li>• Provides strategic insight into human resources benefits, wellbeing programming, employee assistance programs, and other personnel responsibilities.</li></ul>	

Title	Responsibilities	Notes
<b>OPERATIONAL LEADERS</b>		
<b>1-2 Representatives from the Diversity, Equity, and Inclusion Team</b>	<ul style="list-style-type: none"> <li>Facilitates an inclusive working environment.</li> <li>Helps identify and guide action plans from the lived experiences among healthcare workers who are underrepresented in healthcare occupations.</li> </ul>	
<b>1-2 Representatives from the Patient Safety and Quality Team</b>	<ul style="list-style-type: none"> <li>Works on sustainable operational procedures and is responsible for measuring and tracking quality assurance/improvement key performance indicators.</li> </ul>	
<b>1-2 Representatives from the Communication Team</b>	<ul style="list-style-type: none"> <li>Communicates to healthcare workers about workplace improvements related to wellbeing.</li> </ul>	
<b>1-2 Representatives from Employee Health and Safety Departments</b>	<ul style="list-style-type: none"> <li>Provides deep knowledge of hospital facilities and insights into personnel issues and needs.</li> <li>Helps identify ongoing programs and projects related to employee health and safety.</li> </ul>	
<b>HEALTHCARE WORKERS' LEADERS</b>		
<b>Chief Medical Officer and/or Chief Nursing Officer</b>	<ul style="list-style-type: none"> <li>Leads communication with clinical workforce.</li> <li>Provides strategic insight into integrating wellbeing work into ongoing operational improvements and other initiatives.</li> </ul>	
<b>Medical Executive Community (Department Chairs)</b>	<ul style="list-style-type: none"> <li>Liaises between leadership and physicians.</li> <li>Represents values and concerns of physicians in the hospital.</li> <li>Supports communication and trust-building with healthcare workers about wellbeing work.</li> </ul>	

Title	Responsibilities	Notes
<b>WORKER REPRESENTATIVES</b>		
<b>1-2 Representatives from the Nursing Council</b>	<ul style="list-style-type: none"> <li>• Liaises between leadership and nurses.</li> <li>• Represents values and concerns of nurses in the hospital.</li> <li>• Supports communication and trust-building with healthcare workers about wellbeing work.</li> </ul>	
<b>Union Leadership or Representatives from Other Departments (as many as needed for parity with management)</b>	<ul style="list-style-type: none"> <li>• Liaises between leadership and workers.</li> <li>• Represents values and concerns of other stakeholder groups, including technicians, facilities and custodial staff, clerks, etc. in the hospital.</li> <li>• Supports communication and trust-building with healthcare workers about wellbeing work.</li> </ul>	



## How to use this worksheet:

- Use the following charter as a starting point to help you build your Professional Wellbeing Team norms and expectations. This worksheet draws from the [American Hospital Association Trustee Services](#) and the [North Carolina State Health Plan](#).<sup>i,ii</sup>
- Fill in the names of your hospital, team, members, and/or leaders in the identified spots below.
- Evolve this charter based on the parameters of your hospital, including its needs and organizational culture.

Hospital Name:

Name of Wellbeing Team:

### I. Statement of Purpose

## II. Roles/Responsibilities

**The management and worker co-leaders will:**

- Set meeting agendas.
- Conduct meetings either jointly or by rotating chairs.
- Coordinate actions in support of professional wellbeing.
- Provide monthly updates to the Executive Sponsor on team activities.

**The Executive Sponsor will:**

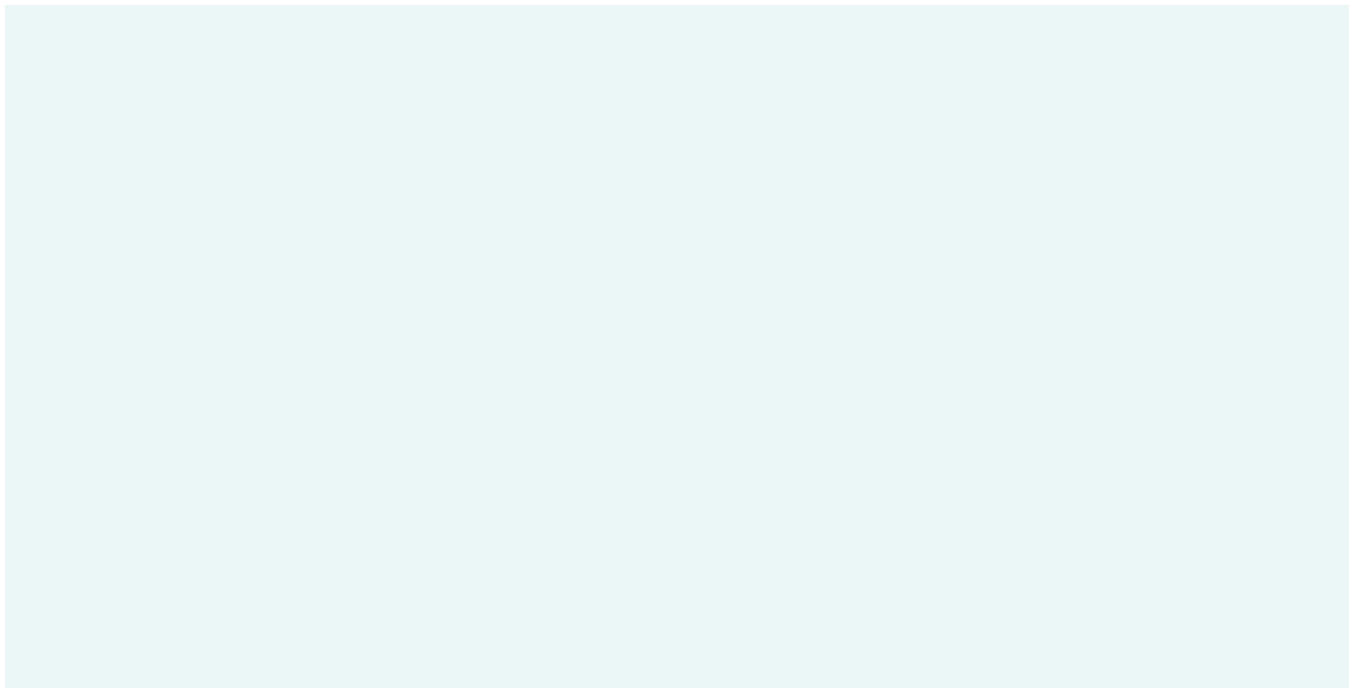
- Oversee hospital-wide buy-in, eliminate barriers to implementation, and act as a liaison between the team, the hospital system, and other non-member executives.

**Team Members will:**

- Work towards operational change and communicate actions to workers at their hospital.
- Participate in monthly Professional Wellbeing Team meetings.
- Identify strategic wellbeing changes.
- Identify the necessary teams to implement the policies and procedures to create a work environment that prioritizes professional wellbeing.
- Communicate with our hospital's workforce about operational changes and make their commitment to this wellbeing initiative known through ongoing, vocal support.
- Speak freely to discuss issues, recognizing that a summary of topics discussed, and decisions made will be distributed outside the committee, but attribution to specific committee members should be kept within the committee.

## III. Membership

**The team will consist of the following members:**





Team members may consist of at least one employee from the identified leadership groups and/or departments outlined in the **Professional Wellbeing Team Roles Chart** (i.e., Diversity, Equity, and Inclusion Team; Patient Safety and Quality Team; Communication Team; Medical Executive Committee; Nursing Council).

- The core membership should consist of   representatives.
  - Additional members may share responsibility, serve as alternates, or act as members at large to represent specific units within the hospital and provide feedback on work at the unit level.
- Members are expected to reflect the values and interests of their respective groups and/or departments as they relate to professional wellbeing.
- Team members commit to actively participating in the team for at least 18 months from the time they join.
- Should a team member be unable to fulfill the expectations outlined within this Charter, they agree to help identify a replacement for review/consideration by the team leader and members.
- It may be necessary to create subcommittees and appoint subcommittee chairs to lead specific projects.

#### IV. Meetings and Structure

- The team will make decisions by:

- The team will resolve differences by:

- Management and workers will have equal opportunities to add agenda items.
- Committee members should be granted paid time for meetings and all other committee duties.
- The team will meet on a [REDACTED] basis<sup>iii</sup>, ideally in-person, for at least 1 hour to:
  - review the status of current wellbeing operations and initiatives.
  - plan future actions.
  - assign member roles for upcoming tasks.
  - discuss how to best address professional wellbeing at an operational level.
- In addition to team meetings:
  - Team members should plan to spend 1-3 hours per month on the development and implementation of wellbeing work.
  - Team leaders should plan to spend 4-6 hours per month on current and future wellbeing activities. More time may be required as the role and tasks evolve.

## V. Communication

- The team should designate a notetaker or rotate the task among members.
- After the meeting, the minutes should be reviewed by the co-leads (management and worker representatives). After approval, they should be distributed to the team and archived. For transparency, the team may decide to post the notes for all hospital employees to read.
- Members will:
  - regularly update each other on wellbeing initiatives' status and operations to ensure work progresses between meetings.
  - prioritize transparency about team activities and maintain open, two-way communication with healthcare workers.
  - maintain a communication plan and use it to share updates with and create mechanisms for other healthcare workers at the hospital to provide input, ask questions, and share ideas with the team.

## VI. Shared Values

- Speak openly and honestly, always.
- Treat one another with respect.
- Be accepting and open to others' ideas and perspectives.
- Don't be afraid to disagree.
- Be willing to learn.
- Encourage creative solutions and brainstorming.

## VII. Goals and Objectives (to be updated at a minimum annually, or as often as needed)

### The team will:

- Use the hospital operations review conducted in Action 1 to determine the current landscape of professional wellbeing, along with key priorities and focus areas.
- Develop annual goals and objectives to pinpoint focus areas specific to the hospital. These goals and objectives will build upon the team's shared commitment to improving the health and wellbeing of healthcare workers to help create changes at an operational, rather than an individual, level.
- Develop a long-term Professional Wellbeing Plan (outlined in Action 6 of this Guide) to help set new goals and inform long-term initiatives throughout the following 6-18 months.
- Review and revise the long-term plan (once it is developed) annually.

The notetaker will record progress towards these goals and objectives in the monthly meeting minutes.

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<sup>i</sup> American Hospital Association Trustee Services [2023]. [Sample committee charter: People and culture committee](#). Washington, DC: American Hospital Association.

<sup>ii</sup> North Carolina State Health Plan [2016]. [Wellness committee charter example](#). Raleigh, NC: North Carolina State Health Plan.

<sup>iii</sup> Professional Wellbeing Teams should meet on at least a monthly basis, if not more frequently.



# 3

## Break Down Barriers for Help-Seeking

Action 1



Action 3



Action 5



Action 2



Action 4



Action 6



# Action 3:

## Break Down Barriers for Help-Seeking



### Purpose:

The purpose of Action 3 is to review and update your hospital credentialing application questions and identify confidential ways for healthcare workers to seek support.

### Key Concept

Data show that intrusive and stigmatizing questions on hospital credentialing applications prevent many healthcare workers from seeking help.<sup>39,40</sup> Auditing and updating hospital **credentialing** questions removes barriers to care. It also sends a clear message to healthcare workers that your hospital supports their mental health.

### Action Items

- Audit your hospital credentialing application questions.
- Update your hospital credentialing application questions, if needed.
- Determine if healthcare workers at your hospital have options to seek free and easily accessible mental health care outside of your hospital network.

### Expected Outcomes

- Completed audit of hospital credentialing application questions.
- Updated hospital credentialing application questions in compliance with best practices, if needed.
- Identified confidential channels for healthcare workers to seek support.

### Resources Provided

- Checklist to Audit Credentialing Applications
- Guide to Update and Remove Intrusive and Stigmatizing Questions

## About Hospital Credentialing and Application Questions

Like everyone, healthcare workers deserve the right to seek mental health care – without the fear of losing their job. Yet, data show that physicians, nurse practitioners, physician assistants, and other licensed healthcare workers fear losing their hospital credentials. Overly broad and invasive mental health questions on credentialing applications fuel this worry and may be stigmatizing and discriminatory.<sup>40</sup>

In 2021, over 30 percent of nurses experienced stigma with seeking mental health support.<sup>41</sup> In 2022, almost 40 percent of physicians were afraid or knew another physician who was afraid to seek help because of the questions asked in their applications.<sup>42</sup> These questions were often added to credentialing applications with good intent to protect the public and mitigate risk. However, there are

no data demonstrating that these questions protect the public. In contrast, it is well-documented that they often lead to healthcare workers not seeking mental health care.<sup>5,40,43</sup> Removing these intrusive mental health questions is an easy and immediate action your Professional Wellbeing Team can take to support your workforce.

**Dr. Lorna Breen**, an accomplished emergency room physician in New York City with no prior mental health issues, died by suicide in April 2020. She treated COVID-19 patients around the clock in the early stages of the pandemic. At the time, she was afraid that in getting help she would end her career. Her family created the **Dr. Lorna Breen Heroes' Foundation** with the mission to reduce burnout and protect the wellbeing of healthcare workers. In 2022, Congress passed the **Dr. Lorna Breen Health Care Provider Protection Act**. This legislation supports suicide and burnout prevention training among healthcare workers and promotes education about suicide and mental health concerns.

## How to Review and Update All Hospital Credentialing and Application Questions

Below are two steps, identified by the Dr. Lorna Breen Heroes' Foundation, that your team can take to help break down barriers preventing your healthcare workers from seeking mental health care.<sup>5</sup>



**Audit your hospital credentialing applications**



**Change any invasive or stigmatizing language around mental health, if needed**

The length of time it takes to update hospital credentialing application questions varies from hospital to hospital, but following the instructions below can streamline the process.

### Step A: Audit Your Hospital Credentialing Applications

Using the **Checklist to Audit Credentialing Applications**, review every credentialing, review, and application form your hospital issues. To maximize efficiency, review all these forms together so that you can identify which forms and specific questions need updating.

**Review Questions in the Following Types of Credentialing Applications and Forms**

- Initial
- Renewal
- Training
- Educational
- Supplemental/Addendum
- Peer Reference
- Peer Review

During the review, look for questions that ask about a history of:

- mental health diagnosis or treatment,
- “time off” or “breaks in practice,”
- substance use or experiences with mental health care, and
- unnecessary asterisks or fine print (e.g., “current impairment can be any time in the last 5 years”).

## Step B: Change Any Invasive or Stigmatizing Language Around Mental Health

Now that your Professional Wellbeing Team has identified the current language in all your hospital’s applications and forms, it’s time to remove or change them. Use the [Guide to Update and Remove Intrusive and Stigmatizing Questions](#) to learn about three approaches to updating the language in all applications. Ensure that all internal decision-makers involved in wellbeing efforts within your hospital have an opportunity to review the revised questions prior to implementing the changes.

**Note:** [ALL IN: WellBeing First for Healthcare](#), an independent coalition of preeminent healthcare organizations led by the Dr. Lorna Breen Heroes’ Foundation, recognizes hospitals for taking these steps to remove intrusive mental health questions from credentialing applications. To become a WellBeing First Champion for Credentialing, [submit](#) your credentialing applications to the ALL IN coalition for verification.<sup>45</sup> Submissions are reviewed on an ongoing basis.

Hospitals can submit their revisions to ALL IN for their legal review and approval prior to implementing the changes within their hospital systems. While this step isn’t required, submitting revisions to the ALL IN coalition provides the



Photo by @RealPeopleGroup/Getty Images

## Sample Application Question

### BEFORE:

Have you ever been diagnosed or treated for a mental health condition?

### REVISIONS:

- Remove information about impairments that occurred in the past.
- Ensure questions that address mental health are posed in the same way as questions about physical health.
- Ensure the question differentiates between the illness and impairments that may result from the illness.

### AFTER:

Are you currently suffering from any condition that is not effectively treated and impairs your judgment or adversely affects your ability to practice medicine in a competent, ethical, and professional manner? (Yes/No)<sup>44</sup>

**Note:** Peer reference forms often include intrusive questions. It is important to examine the questions in these forms as well. The colleague a healthcare worker would ask to complete the form is likely the same person the healthcare worker would confide in if they need support.

added benefit of access to experts in hospital credentialing at the Dr. Lorna Breen Heroes' Foundation. Additionally, your hospital can receive an ALL IN WellBeing First Champion for Credentialing badge, which can be an effective tool to demonstrate and communicate wellbeing efforts to your workforce.

Once you've updated your applications and forms, share these language changes with staff. This demonstrates to new hires and existing staff that you value their privacy and wellbeing and do not ask intrusive health questions on your credentialing applications. In Action 4, you will discover tips and templates for communicating effectively with your workforce.

## Considerations for Hospital Systems

If you are unable to make changes to your hospital credentialing application questions because these questions are developed and determined by the larger hospital system where you work, consider reaching out to decision-makers within your hospital system to elevate this issue. Share this Guide with them to demonstrate the purpose of updating questions and how it can support healthcare worker wellbeing across your hospital system.

## Additional Ways to Break Down Barriers for Help-Seeking

### Identify Confidential Channels of Support

Healthcare workers who access mental health and substance use support or counseling at the hospitals where they work are often treated by their colleagues. This can lead to loss of confidentiality and risk of facing both individual and social stigma.<sup>40</sup> It is strongly encouraged that hospitals provide an alternative outside of their hospital network. This could be confidential care through a different hospital or an unaffiliated online platform. Your hospital should secure a confidential option and share this information with your staff.

It is important to consider cultural relevance and accessibility when providing your staff support and resources outside of the hospital they work in. For example, consider offering resources in different formats or platforms, in different languages, at hours that are flexible to accommodate workers' varying schedules, and that are geographically accessible. Healthcare workers come from many different backgrounds, and mental healthcare providers and service offerings need to recognize and appreciate the impact of those cultural backgrounds on their identity and experiences.



**Our hospital's priorities are to...foster an inclusive and collaborative environment, and I think there may have been gaps in some of our documents that didn't effectively show this priority. Reviewing these documents helped us further our mission to create an environment of inclusivity between our medical staff and house staff.**

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## Normalize Mental Health Challenges

As a hospital leader, **you can also share your own experiences with burnout** to promote a workplace culture of help-seeking and reduce stigma.<sup>46</sup> The best way to share your experience is person-to-person. You could mention something you've gone through in conversation or stand up at a Grand Rounds and share how you got through an emotionally taxing case. When hospital leaders openly share their challenges and experience about needing mental health support, it sends a powerful message to staff. This can help staff feel less isolated in their own struggles with mental health and improve social connectedness within your organization.<sup>47</sup> Use this **conversation guide** to encourage staff to seek help if they need it and share information with staff about the resources available to them.<sup>48</sup>

*The words you use to talk about mental health can transmit stigma and prevent staff from seeking care. **Explore resources from the American Hospital Association** on how to use destigmatizing language and help your workforce feel safe seeking mental health treatment.<sup>49</sup>*

## Learn About Your State's Licensing Application Questions

Intrusive questions on **state licensure applications** are also a significant source of mental health stigma for healthcare workers.<sup>40</sup> Your team can contact your state licensing boards to request the state's licensing application questions. Your team can also collaborate with your state licensing board to ensure their applications are free from overly broad and invasive questions by taking similar steps. A complete list of state medical boards that have audited and revised their licensure application questions is available from the **Dr. Lorna Breen Heroes' Foundation**.



I don't know without this exercise that I would have ever looked at our application process. So, it has been out there and a little bit invisible to others outside the medical staff office.

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## Moving Forward

After completing Action 3, your team has now successfully reduced barriers to seeking and accessing mental health care. To share this accomplishment and what it means for your healthcare workers, move on to Action 4 to communicate your hospital's overarching commitment to wellbeing.



## How to use this checklist:

- Use the following checklist to review each of your hospital's applications and forms. This includes credentialing, review, peer reference, and application forms.
- Start by reaching out to your hospital's medical staff services department and credentialing committee to help locate these forms.
- Copy and fill out this checklist as many times as needed to review each of your applications and forms.
- Make note of any changes needed and people to follow up with to remove/revise invasive or stigmatizing language around mental health.

### Name of Application/Form Reviewed:

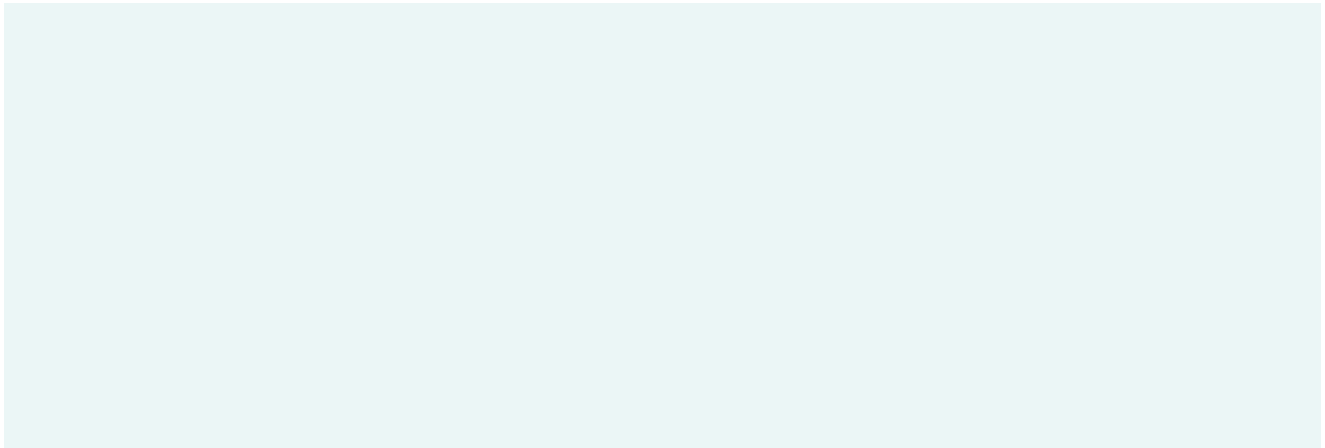
The goal of this audit is to remove questions about mental health that go beyond current impairment, contain invasive or stigmatizing language, and/or request disclosures around a clinician's health or wellbeing, including:

#### **1. Questions that ask about a history of mental health diagnosis or treatment.**

Action Items/Notes:

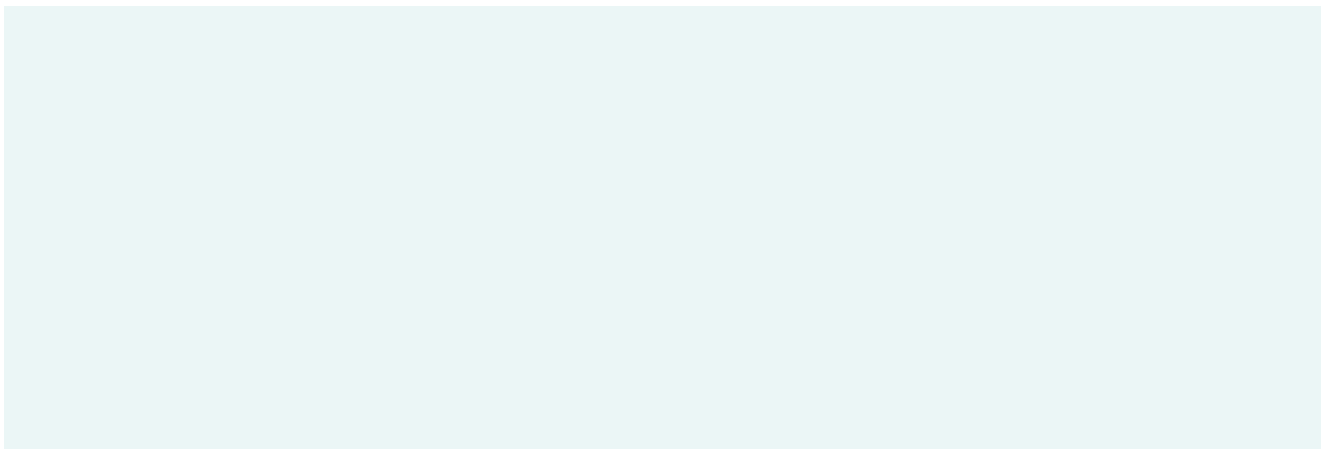
**2. Questions that ask about a clinician’s history of “time off” or “breaks in practice.”**

Action Items/Notes:



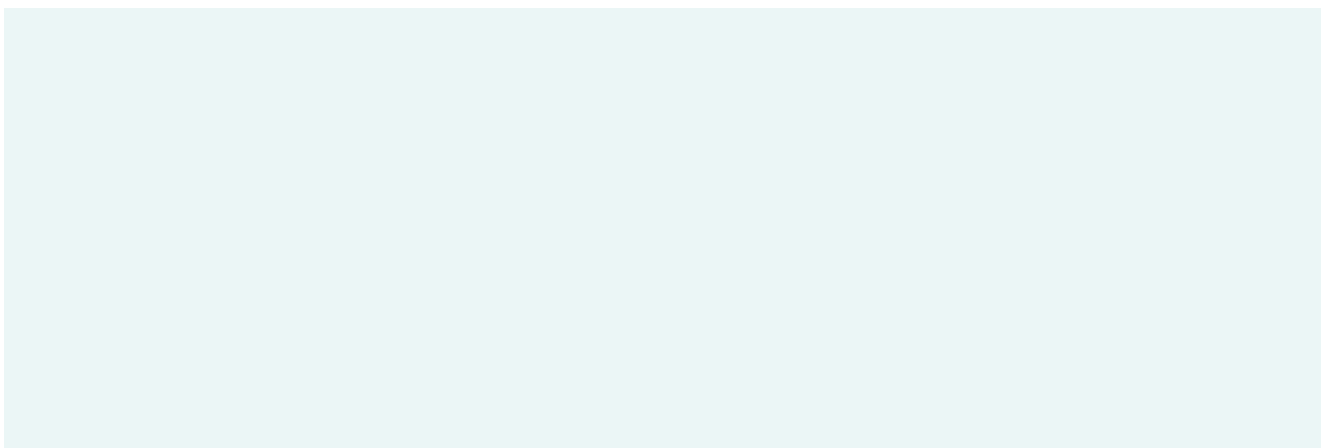
**3. Questions that ask about past substance use or experiences with mental health care.**

Action Items/Notes:



**4. Questions that include overly broad language and unnecessary specifications that could prevent healthcare workers from responding truthfully (e.g., “current impairment can be any time in the last 5 years” may be confusing to healthcare workers as “current” and “5 years” span different timeframes).**

Action Items/Notes:





### How to use this guide:

- Select one of the following three approaches to update the questions in your organization’s credentialing, review, and application forms.
- Note that this guide draws from the Dr. Lorna Breen Heroes’ Foundation’s toolkit to [\*\*Remove Intrusive Mental Health Questions from Credentialing Applications\*\*](#).<sup>iv</sup>

#### Three options to change application language:

##### Option 1:

Ask one question consistent with the Federation of State Medical Board’s Recommended Language that addresses all mental and physical health conditions as one. Avoid added explanations, asterisks, or fine print.<sup>v</sup>

**Use the following language:** “Are you currently suffering from any condition for which you are not being appropriately treated that impairs your judgment or that would otherwise adversely affect your ability to practice medicine in a competent, ethical, and professional manner? (Yes/No)”

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##### Option 2:

Refrain from asking probing questions about an applicant’s health altogether.

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##### Option 3:

Implement an ***Attestation Model***, like that used in North Carolina and Mississippi.<sup>vi</sup> This uses supportive language around mental health from the Federation of State Medical Boards. It holds healthcare workers accountable to their wellbeing, making it clear that their self-care is patient care. Offer “safe haven” non-reporting options to healthcare workers who are:

- under treatment, and
- in good standing with a recognized physician health program or other appropriate care provider.

### Attestation Model Language Example from North Carolina:

*Important: The Board recognizes that licensees encounter health conditions, including those involving mental health and substance use disorders, just as their patients and other healthcare providers do. The Board expects its licensees to address their health concerns and ensure patient safety. Options include seeking medical care, self-limiting the licensee's medical practice, and anonymously self-referring to the NC Physicians Health Program, a physician advocacy organization dedicated to improving the health and wellness of medical professionals in a confidential manner. The failure to adequately address a health condition, where the licensee is unable to practice medicine within reasonable skill and safety to patients, can result in the Board taking action against the license to practice medicine.*

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<sup>iv</sup> ALL IN: WellBeing First for Healthcare [2022]. [Remove intrusive mental health questions from credentialing applications](#). Charlottesville, VA: The Dr. Lorna Breen Heroes' Foundation.

<sup>v</sup> Federation of State Medical Boards [2018]. [Physician wellness and burnout: Report and recommendations of the workgroup on physician wellness and burnout](#). Euless, TX: Federation of State Medical Boards.

<sup>vi</sup> North Carolina Medical Board [n.d.]. [Obtain a license verification](#). Raleigh, NC: North Carolina Medical Board.



# 4

## Communicate Your Commitment to Professional Wellbeing

Action 1



Action 3



Action 5



Action 2



Action 4



Action 6

# Action 4:

## Communicate Your Commitment to Professional Wellbeing

### Purpose:

The purpose of Action 4 is to develop a plan for two-way communication with hospital staff about your wellbeing work. Communicating with your workforce helps build trust between leaders and workers, generates buy-in, and creates opportunities for staff to provide feedback.

### Key Concept

Clear, consistent, and open communication with staff is an essential part of professional wellbeing. Developing a plan to communicate about wellbeing work throughout the process helps keep your healthcare workforce informed and able to give input about:

- Changes your Professional Wellbeing Team is making,
- How it positively impacts them, and
- What is to come.

### Action Items

- Work with a communication professional at your hospital to outline a plan for communicating operational changes along the way.
- Communicate with your staff about your wellbeing work and progress across a variety of channels. Make it an ongoing activity and ensure there are mechanisms for staff to give their input and feedback.

### Expected Outcomes

- Shared a communication plan with Professional Wellbeing Team members.
- Communicated to staff about the Professional Wellbeing Team and the status of wellbeing work, including changes to credentialing application questions.

### Resources Provided

- Communication Plan Outline
- Sample Emails
- Sample Meeting Slide Content
- Leadership Rounding Form

## About the Importance of Communication

Communicating your commitment to professional wellbeing with staff is essential to supporting healthcare workers. Transparent, ongoing communication between leadership and healthcare workers builds trust, ensures that your wellbeing work is known throughout your hospital, and values staff input.<sup>50</sup> As your team actively addresses the systems and workflows that can contribute to burnout, it is important to make staff aware of these improvements and get their feedback. Sharing regular updates can prevent a disconnect across different departments and workstreams in your organization.

**Note:** The Executive Sponsor should serve as the spokesperson of your Professional Wellbeing Team and take ownership in communication. This Action is a collaborative effort between the Executive Sponsor, the Communication Team at your hospital, and/or a communication professional on your Professional Wellbeing Team.

## What Is a Communication Plan?

A communication plan summarizes your strategy and the ways in which you will share information with your workforce.<sup>7</sup> Your plan should outline who you intend to reach, what information you intend to share, and how you will share this information. Having a communication plan ensures that you efficiently and effectively share your progress and take into account staff input across the hospital.

The Executive Sponsor of your Professional Wellbeing Team should collaborate with someone from your hospital's Communication Department or Team to outline your communication plan and make decisions on specific communication strategies. If your hospital does not have a marketing or communication department, you may need to seek systems-level communication support.

**Note:** Based on the [Professional Wellbeing Team Roles Chart](#) from Action 2, there may already be a communication professional on your team. If your hospital does not have an official Communication Department or Team or designated communication professional, identify an interested team member or administrative specialist to help carry this work forward in tandem with your Executive Sponsor. For non-communication professionals who may fill this role, see the [Impact Wellbeing website](#) for best practices.

Use the fillable [Communication Plan Outline](#) as a starting point to capture priorities for communicating with the staff at your hospital. As your work progresses, you can refer back to your communication plan to guide you.

## Establish Channels for Two-Way Communication

As you develop your plan, create mechanisms for two-way communication. Healthcare workers should be able to provide input, ask questions, and share ideas with executive leadership and the Professional Wellbeing Team throughout the process. Any significant decisions made within the hospital should consider the impact on your workforce. This is why establishing channels for two-way communication is important to support ongoing professional wellbeing efforts.



When our team went out and talked to staff, a consistent theme was that it was very unknown where our resources on wellbeing could be found. From an operational leadership side, we need to clearly define and communicate where these resources are and streamline our efforts toward a more centralized communication style. Action 4 really made us think about these questions.

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For example, you could set up an email address that goes directly to the Professional Wellbeing Team, create an anonymous survey, or leave time for open Q&A in department meetings. Professional Wellbeing Team members and/or the Executive Sponsor can also consider making rounds directly with healthcare workers.

**Leadership rounding is an important opportunity for two-way communication about healthcare worker wellbeing.** *When leadership rounds, they can listen to staff share what is going well and what issues need to be addressed. While in-person communication like rounding is among the most effective ways to listen and learn from staff, it is also important to ensure there are multiple streams available for staff to share feedback.*

Strong relationships between department management and staff are also key to supporting professional wellbeing and trust-building. Regular check-ins between unit-level managers and staff are an excellent way to foster two-way communication. While there are culture benefits to managers maintaining individual relationships with staff, it's important to remember that your role as a leader is to foster a safe and supportive work environment by making systems-level improvements.<sup>51</sup>

**Note:** Consider creating a listserv of “wellbeing ambassadors” from across the hospital system who express interest in extending the reach of your efforts and supporting communication efforts within departments.

## Announce Your Commitment to Professional Wellbeing

Announcing the Executive Sponsor and Professional Wellbeing Team’s dedication to professional wellbeing should be a key component of your communication activities. It demonstrates a commitment on behalf of your organization’s leadership to make the needed changes within your hospital to improve the professional wellbeing of your workforce.

It may even encourage others across your hospital to get involved in this work. It is especially important to engage with mid-level managers who often communicate most directly and have high levels of trust with healthcare workers.

Also consider announcing your wellbeing work publicly (e.g., posting to your hospital’s social media channels, announcing to your team a pledge that outlines the six Actions you will take as part of this Guide, or sending out a press release). Publicly announcing your wellbeing work sends a clear message to other hospitals, colleagues, and prospective staff that you are forward-thinking and responsive to the nationwide call to support professional wellbeing.

**Note:** Showing your workforce and community that you’ve already taken action helps generate buy-in and support. This is important so your staff understands that you hear them and are making changes based on their input. If staff provide feedback and nothing changes, they learn that giving feedback is ineffective. However, if your staff understand that their feedback is heard and used, they will feel more engaged and that your work is meaningful.

## How to Communicate Your Progress

The Executive Sponsor and your hospital's Communication Team will use the communication plan to determine the most effective ways to share updates with staff about the work you're doing. This plan will help you announce your Professional Wellbeing Team and credentialing application changes. For example, you can include updates about credentialing application changes in regular staff newsletters. You can encourage department chairs or nursing council representatives on your Professional Wellbeing Team to talk about wellbeing progress during department meetings. Sharing this information in multiple ways across your hospital helps make sure that everyone is informed about your progress. It also demonstrates that you listen to staff and make specific changes based on what they share.

**Note:** As the liaison between the Professional Wellbeing Team and your hospital, all official communication should come from, or be signed by, the Executive Sponsor.

### Determine the Best Ways to Reach Your Healthcare Workforce

There likely are many ways you are already communicating with hospital staff, such as by sending all-staff emails, placing posters within your hospital, and through mid-level managers who meet with healthcare workers regularly. Use these strategies and other channels to reinforce your message and increase the chance that healthcare workers will see and retain the information.<sup>7</sup>

**Note:** Some of the sample communication provided in this Action include ideas for communicating about your hospital's Professional Wellbeing Plan, which you will develop in Action 6. Only communicate about the activities you've completed at this point. Refer to the samples for ideas about how to communicate about your Professional Wellbeing Plan once it is developed.



A common theme we heard was that frontline healthcare staff sometimes work three 12-hour shifts in a row, and the last thing they want to do is go through their email or even focus on their mental health because they are so busy. Different forms of communication are always welcomed.

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Here are some ideas for channels you may already use at your hospital to communicate with staff. Since every hospital has some channels in place for staff communication, consider how you can use those existing channels to incorporate regular updates on professional wellbeing work at your hospital. Use multiple channels and consider how often you want to share updates internally.

## 1 Written Communication and Materials

- **Email Announcements:** Adapt the [Sample Emails](#) and work with your hospital's Communication Team to determine the best time to send the email.
- **Newsletters:** Include announcements with updates from the Professional Wellbeing Team in regular staff newsletters.
- **Screen Savers:** Consider sharing key communication via hospital computer screen savers/log-in screens that get multiple views per day by most employees.
- **Email Signatures:** Consider adding information or links to your hospital wellbeing work in your email signature.
- **Signs/Posters:** Hang posters in public spaces and other high-traffic areas such as break rooms, bathrooms, and bulletin boards.
- **Badges:** The [WellBeing First Champion Badge](#) from the Dr. Lorna Breen Heroes' Foundation provides a seamless way to communicate about your credentialing changes in [Action 3](#). Verify your credentialing applications and receive a badge to show new and existing staff that your hospital will not require healthcare workers to answer intrusive mental health questions.
- **Social Media:** If your hospital uses social media to share news and announcements with staff, draft multiple posts to share about the changes you are making and updates from the Professional Wellbeing Team. Include an announcement about the credentialing application question updates on Facebook, Twitter, and LinkedIn, if you use those channels.
- **Job Postings:** Include information about your hospital's ongoing commitment to wellbeing and operational changes in current and future job postings.
- **Staff Onboarding:** Update all existing clinician and staff onboarding materials to include:
  - Changes to credentialing application questions, and
  - Other information from the Professional Wellbeing Team.

## 2 In-Person Events and Interactions

- **Department Meetings, Grand Rounds, and Hospital Town Halls:** Use the sample materials in this section and adapt the slide content/talking points to reflect your specific hospital's progress.
- **Nursing Council:** Ask Nursing Council leadership to share information about the wellbeing work in their regular meetings.
- **Feedback Meetings:** Set up meetings to get feedback from staff about the most important wellbeing issues to address and how they have been affected by your ongoing wellbeing initiatives.



The [\*\*\*Impact Wellbeing website\*\*\*](#) offers customizable materials for you to share updates with staff about your commitment to professional wellbeing and wellbeing work. The website also includes helpful tips about how to have non-stigmatizing conversations with staff, emphasize two-way communication, and reach diverse healthcare worker groups.

### Suggested Timing for Sharing Updates Around Key Milestones

- **One month after creating your Professional Wellbeing Team:**  
Introduce Your Professional Wellbeing Team
- **Within one week of updating your credentialing application questions:**  
Announce Your Credentialing Application Updates
- **Within one week of announcing your credentialing application updates:**  
Share Confidential Channels for Mental Health Support
- **Within one week of adding *professional wellbeing measures* to an ongoing quality improvement project (in Action 5):**  
Inform Staff about Efforts to Integrate Wellbeing into Existing Projects
- **Within one week of drafting your Professional Wellbeing Plan (in Action 6):**  
Share Your Professional Wellbeing Plan

## Moving Forward

Once you've completed Action 4, you will have plans for clear, regular, and open communication with staff about professional wellbeing plans and progress. While you've started, it's important to remember that regular communication is central to continuing to build trust. This plan provides a starting point, but it needs to be used and optimized on an ongoing basis so staff can see, remember, and act on your messages. Next, you will learn about the importance of integrating professional wellbeing into quality improvement projects.



## How to use this outline:

- Use the following outline as a starting point to facilitate a conversation between your Professional Wellbeing Team and the Communication Team at your hospital and create a communication plan.<sup>vii</sup>
  - As the Executive Sponsor, work with the Communication Department or Team at your hospital or a communication professional on your Professional Wellbeing Team to fill in the notes section and save this as a reference point as the full team moves through the following Actions.
- Consider diversity in roles and demographics when developing your plan. Products and messages may need to be tailored to best reach different members of your workforce.
- Continually use this outline as an internal reference point to ensure that you are keeping your workforce up to date as you progress.

Section	Guiding Question	Tip
<b>Background</b>	What do you know about the current state of professional wellbeing at your hospital?	Use the <a href="#">Hospital Review Worksheet</a> from Action 1 to find a summary of your organization's current efforts.
<b>Notes:</b>		

Section	Guiding Question	Tip
<b>Goals</b>	What effect do you want your communication efforts to have?	Aim to make these “SMART” goals, meaning Specific, Measurable, Achievable, Relevant, and Time-Bound.
<b>Notes:</b>		
<b>Audience(s)</b>	Who do you want to reach and why?	Ensure you aim to reach licensed healthcare workers as a starting point. As your communication and wellbeing work continues, be sure to reach other staff within the hospital including patient care technicians, facilities, and custodial staff, clerks, and others.
<b>Notes:</b>		

Section	Guiding Question	Tip
<p><b>Messages</b></p>	<p>What do you want people to know?</p>	<p>Keep your messages consistent, focused on a specific topic, and aligned with your goals. Start with messages for licensed healthcare workers and consider how to tailor or adjust your messages based on other hospital staff audiences.</p>
<p><b>Notes:</b></p>		
<p><b>Channels</b></p>	<p>How are you going to get your message out to your audience?</p>	<p>Consider using a combination of in-person events, digital communication, and print materials to reach healthcare workers at your hospital, including opportunities for two-way communication.</p>
<p><b>Notes:</b></p>		

Section	Guiding Question	Tip
<b>Materials</b>	What products will support your communication efforts?	Use a variety of formats and channels (e.g., posters/signs, email listservs, etc.) to increase the chances of your staff seeing/hearing your updates. Find shareable materials on the <a href="#"><b><i>Impact Wellbeing website</i></b></a> to get started.
<b>Notes:</b>		
<b>Timing</b>	How often will you communicate with your workforce?	Plan your communication around milestones (e.g., introducing the Professional Wellbeing Team, launching credentialing updates). Consider timing these announcements with existing events like Grand Rounds or scheduled department meetings.
<b>Notes:</b>		



Section	Guiding Question	Tip
<b>Evaluation</b>	How will you know that your messages reached your audience?	Ask managers and staff if they remember hearing/seeing updates about your hospital's wellbeing work (such as updates to credentialing application questions from Action 3). You could also use emails or in-person meetings to collect this feedback.
<b>Notes:</b>		

<sup>vii</sup> Centers for Disease Control and Prevention [2018]. **Health communication playbook: Resources to help you create effective materials**. Atlanta, GA: Centers for Disease Control and Prevention.



### How to use these sample emails:

- Fill in and adapt the content below to share updates about ongoing actions to improve wellbeing at your hospital.
  - All emails should come from, or be signed by, the Executive Sponsor, as the liaison between the Professional Wellbeing Team and your hospital system.
- Include updates about your:
  - Professional Wellbeing Team (*Email 1*)
  - Credentialing Application (*Email 2*)
  - Confidential Channels of Support (*Email 3*)
  - Efforts to Integrate Wellbeing into Existing Projects (*Email 4; to be developed during Action 5*)
  - Professional Wellbeing Plan (*Email 5; to be developed during Action 6*)
- Send these emails over a series of months. Ensure that you have completed each associated Action before sharing progress with staff.
- Consider providing healthcare workers with a way to share anonymous feedback in response to these emails through a survey link or other method.
- Use the language below as talking points or include it in any internal newsletters, blog posts, or other written communication material that you already use within your hospital.

### Email 1: Sharing Professional Wellbeing Team with Hospital Staff

**Suggested Timing:** One month after creating your Professional Wellbeing Team.

**Subject:** Important Update: Introducing Our Professional Wellbeing Team

**Note:** Please remember to include photos/headshots of the Professional Wellbeing Team leaders in your email message.

Dear Colleagues [IF YOU HAVE A STANDARD OPENING WHEN YOU ADDRESS YOUR STAFF, PLEASE USE IT HERE],

Today, I am pleased to announce that [INSERT HOSPITAL] has established a Professional Wellbeing Team, a new multidisciplinary group of representatives from across our organization

who will focus on reducing burnout and promoting the wellbeing of our healthcare workforce through operational changes over the next six months.

The Professional Wellbeing Team includes *[INSERT NAMES AND TITLES FOR ALL TEAM MEMBERS]*.

As leaders of *[INSERT ORGANIZATION]*, we acknowledge our roles in creating a safe, healthy, and fulfilling environment for our workforce. We pledge to continue protecting healthcare workers' wellbeing by enacting new or revising existing policies. Through the *Impact Wellbeing* campaign, we will partner directly with other leaders and staff in these efforts and commit to taking evidence-informed actions. As the Executive Sponsor of this charge, the Professional Wellbeing Team and I commit to holding our hospital accountable for this work and will share specific updates in the coming weeks.

As we continue this work, your insights are important. If you have feedback or questions, we encourage you to reach out to the Professional Wellbeing Team at *[INSERT TEAM EMAIL ADDRESS]*.

Sincerely,

*[NAME OF EXECUTIVE SPONSOR]*

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## Email 2: Announcing the Credentialing Application Updates

**Suggested Timing:** *One week after updating your credentialing application questions.*

**Note:** If you updated more than one credentialing application in Action 3, revise this language to reflect multiple applications and consider adding specificity around which applications were updated.

**Subject:** Important Wellbeing Update: Our Credentialing Application Prioritizes Your Wellbeing

Dear Colleagues,

Through the *Impact Wellbeing* campaign, the Professional Wellbeing Team has partnered with other leaders and staff to update our credentialing application. These forms are now free from intrusive and stigmatizing language around mental health care and treatment. I'm pleased to announce that we have taken this step to ensure that our workforce can seek needed care without fear of professional repercussions.

To ensure transparency, you can view questions from our credentialing application here *[INCLUDE LINK TO ALL QUESTIONS]*.

*[INSERT HOSPITAL NAME]* recognizes that supporting and protecting the mental health of our workers is paramount to your wellbeing and the wellbeing of our entire community.

We encourage you to share this information with your colleagues, so they know that it is safe to seek mental health care if they need support.

You should also be aware that in *[STATE/STATES]*, state licensing applications *[MAY/ DO NOT]* currently ask intrusive questions about mental health. You can find out more about state licensing

questions by visiting *[LINK TO STATE LICENSING BOARD WEBSITE]*, as well as [drlornabreen.org/removebarriers](https://drlornabreen.org/removebarriers).

As always, if you have feedback or questions, please reach out to the Professional Wellbeing Team at *[INSERT TEAM EMAIL ADDRESS]*.

Sincerely,

*[NAME OF EXECUTIVE SPONSOR]*

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### Email 3: Sharing Confidential Channels for Mental Health Support

**Suggested Timing:** *One week after announcing your credentialing application updates.*

**Subject:** Important Wellbeing Update: Access Confidential Mental Health Support

Dear Colleagues,

On behalf of the Professional Wellbeing Team, we are pleased to share information about confidential channels to support your mental health and wellbeing. It is a priority among leadership that you have access to counseling services both within and outside of our hospital network. We encourage you to use any of the following options to seek mental health care when you need it.

- *[INSERT LIST OF SERVICES THAT YOU'VE IDENTIFIED AND PROVIDE LINKS WHERE POSSIBLE]*

You can also contact *[INSERT NAME OF PEER SUPPORT PERSONNEL OR PROGRAM]* to participate in peer-to-peer support programming.

As always, if you have feedback or questions, please reach out to the Professional Wellbeing Team at *[INSERT TEAM EMAIL ADDRESS]*.

Sincerely,

*[NAME OF EXECUTIVE SPONSOR]*

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### Email 4: Informing Staff about Efforts to Integrate Wellbeing into Existing Projects

**Suggested Timing:** *One week after adding professional wellbeing measures to your ongoing quality improvement project (in Action 5).*

**Subject:** Important Wellbeing Update: *[INSERT CHOSEN PROFESSIONAL WELLBEING MEASURE]*

Dear Colleagues,

On behalf of the Professional Wellbeing Team, I am excited to share an update on the steps we are taking to improve your wellbeing at work. Our team has asked staff about the administrative and operational burdens that affect your work and heard that *[INSERT KEY TAKEAWAYS ABOUT*

*BURDENS*]. Based on this input, we are adjusting our ongoing work on *[INSERT IDENTIFIED ONGOING QUALITY IMPROVEMENT PROJECT]* by incorporating *[INSERT PROFESSIONAL WELLBEING MEASURES AND ANY OPERATIONAL ADJUSTMENTS]*.

*[INSERT INFORMATION ABOUT HOW YOU ANTICIPATE THIS WILL AFFECT THE HEALTHCARE WORKFORCE.]*

We will continue to listen to your feedback and ensure that *[INSERT IDENTIFIED ONGOING QUALITY IMPROVEMENT PROJECT]* takes into consideration its impact on your wellbeing. More information will be shared in the coming weeks.

We encourage you to provide feedback by contacting the Professional Wellbeing Team at *[INSERT TEAM EMAIL ADDRESS]*, and please let us know of any questions.

Sincerely,

*[NAME OF EXECUTIVE SPONSOR]*

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## Email 5: Announcing Your Professional Wellbeing Plan

**Suggested Timing:** *One week after drafting your Professional Wellbeing Plan (in Action 6).*

**Subject:** Important Wellbeing Update: Announcing Our Professional Wellbeing Plan

Dear Colleagues,

As part of the *Impact Wellbeing* campaign, I am pleased to announce that our hospital has developed a plan to improve professional wellbeing at *[INSERT HOSPITAL NAME]* over the next year. Our Professional Wellbeing Team developed this plan with careful consideration and with input from staff about ways to help reduce burnout and improve our hospital operations.

Specifically, in the next three months, we'll work to accomplish the following:

*[SHARE HIGH-LEVEL GOALS FOR NEXT THREE MONTHS]*

We are taking these actions to improve working conditions at *[INSERT HOSPITAL NAME]*. We will continue to share updates on our progress, including plans for next steps, in regular three-month intervals throughout the next year.

We encourage you to provide input on our goals by contacting the Professional Wellbeing Team at *[INSERT TEAM EMAIL ADDRESS]*, and please let us know of any questions.

Sincerely,

*[NAME OF EXECUTIVE SPONSOR]*



### How to use this meeting slide content:

- Adapt and use the following slide content to present your Professional Wellbeing Team's progress updates to your workforce.
  - Include this information in your hospital's existing materials or adapt this content as talking points for meetings.
- Plan to present this information during Grand Rounds, department meetings, nursing council meetings, or other opportunities when healthcare workers come together at your hospital.

### Sample Meeting Slide: Introducing Our Professional Wellbeing Team

*Suggested Timing: One month after creating your Professional Wellbeing Team.*

**SLIDE TITLE: Introducing Our Professional Wellbeing Team**

This new multidisciplinary group of representatives from across our organization will focus on reducing burnout and promoting the professional wellbeing of our workforce through operational changes over the next six months.

*[Placeholders to include photos/headshots of the Professional Wellbeing Team leaders]*

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### Sample Meeting Slide: We Changed Our Credentialing Application to Prioritize Wellbeing

*Suggested Timing: One week after updating your credentialing application questions.*

**Note:** If you updated more than one credentialing application in Action 3, revise this language to reflect multiple applications and consider adding specificity around which applications were updated.

**SLIDE TITLE: We Changed Our Credentialing Application to Prioritize Wellbeing**

The Professional Wellbeing Team has partnered with other leaders and staff to update our credentialing application. Our updated **credentialing application questions are free from**

**intrusive and stigmatizing language around mental health care and treatment.**

- We have taken this step to ensure that our workforce can seek needed care without fear of professional retaliation.
- To ensure transparency, you can view questions from our credentialing application here at *[LINK]*.
- Share this information with your colleagues, so they know that it is safe to seek mental health care and that we support you.

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## **Sample Meeting Slide: Professional Wellbeing Plan Update**

**Suggested Timing:** *One week after drafting your Professional Wellbeing Plan (in Action 6).*

**SLIDE TITLE: Professional Wellbeing Plan Update**

Our Professional Wellbeing Team is proud to share our plans for next steps to further create a safe and healthy environment for our healthcare workers.

In the next three months, we aim to:

- *[INSERT LIST OF HIGH-LEVEL GOALS, REFERENCE **PROFESSIONAL WELLBEING PLAN OUTLINE**]*

The Professional Wellbeing Team has begun to take these steps to better support you in delivering high quality patient care. We will share updates on our progress, including plans for next steps, in regular three-month intervals throughout the year.



## How to use this leadership rounding form:

- Use the following form as a starting point to help you expand existing leadership rounds as an opportunity to improve two-way communication with staff. This form draws from the Centers for Medicaid and Medicare Services [Leadership Rounding Form](#).
- Build relationships with staff during your planned rounds by taking the time to listen and respond to your staff's needs.
- Plan, conduct, and reflect on rounding to have better conversations about wellbeing with staff and hear directly from your workforce. In-person rounding should be a key component of ongoing wellbeing efforts.

### Leadership Rounding Overview

Leadership rounding is a process where leaders talk with staff directly about the way their organization functions. This takes place where the staff work, not where leaders work. It allows leaders to both witness hospital processes and meet healthcare workers where they are to gather feedback.

#### Questions to Consider Before Rounding:

1. Which leaders will conduct rounds?
2. How frequently will rounds take place?
3. What do you want to learn?
4. What barriers have already been identified that employees should be asked for their input on?
5. How will you document key feedback you hear from staff?

### Important Questions to Ask Your Workforce During Rounding:

1. What's going well for you?
2. What needs to be improved or worked on?
3. How can I help?
4. Share information about current wellbeing work and upcoming changes. Ask for input and feedback.

### To Do After Rounding:

1. Identify frequently noted concerns.
2. Prioritize issues.
3. Follow up to show responsiveness to hospital staff. Demonstrate how issues were resolved and staff feedback was heard.
4. Consider ways to acknowledge employee efforts and contributions to wellbeing.





5

## Integrate Professional Wellbeing into Quality Improvement

Action 1



Action 3



Action 5



Action 2



Action 4



Action 6

# Action 5:

# Integrate Professional Wellbeing into Quality Improvement

## Purpose:

The purpose of Action 5 is to integrate professional wellbeing measures into an ongoing quality improvement project at your hospital. It is important to consider the impact on your workforce when undertaking any quality improvement project, regardless of whether or not it seems directly related to wellbeing.

## Key Concept

Hospitals must take steps to ensure that healthcare workers can do their work while limiting administrative and operational burdens. It is important to consider how projects aiming to address these burdens could impact your healthcare workforce. **Quadruple Aim Quality Improvement** recognizes professional wellbeing as a key outcome that is essential to improving your hospital.<sup>24</sup>

## Action Items

- Gather information about current administrative or operational burdens at your hospital and set priorities.
- Identify one existing **quality improvement project** not already related to wellbeing.
- Add professional wellbeing measures, or key performance indicators related to professional wellbeing, to your quality improvement project.

## Expected Outcome

- Professional wellbeing measures incorporated into one of your hospital's ongoing quality improvement projects aligned to your goals.

## Resources Provided

- Quadruple Aim Quality Improvement Guide
- List of Professional Wellbeing Measures

## About Quadruple Aim Quality Improvement

### What is Quadruple Aim Quality Improvement?

In 2008, The Institute for Healthcare Improvement introduced the **Triple Aim**, a three-pronged approach for health systems to optimize performance. The Triple Aim proposes that improvement of health systems requires simultaneous efforts to:

- 1 Improve patient experience (including quality and satisfaction),
- 2 Improve the health of populations, and
- 3 Reduce the per capita cost of healthcare.<sup>29,52</sup>

Burnout among healthcare workers is also associated with lower patient satisfaction, worse clinical outcomes, and higher healthcare costs.<sup>53</sup>

Since the Institute for Healthcare Improvement introduced the Triple Aim, experts now encourage hospitals to adopt Quadruple Aim Quality Improvement. It adds professional wellbeing as a fourth dimension critical for improving hospitals and health systems. It is important to keep people, and their wellbeing, centered throughout healthcare processes. Systems often center patients but must also recognize that there are two groups of people at the center of healthcare systems, both patients and healthcare workers. When systems work for people, people can work within systems more effectively.

Quadruple Aim Quality Improvement is a framework to both ensure that quality improvement projects do not compromise professional wellbeing and measure the impact of these projects on the workforce.<sup>53</sup> You can begin to implement Quadruple Aim Quality Improvement by adding professional wellbeing measures to your ongoing quality improvement projects.

A new framework, ***Quintuple Aim Quality Improvement***, further expands the Quadruple Aim model to incorporate health equity as fifth element to quality improvement (figure below).<sup>25</sup> Many widely acknowledged disparities affect patient outcomes, caused by a variety of social determinants of health. While this Action focuses on adding professional wellbeing through the Quadruple Aim, it's important that you set health equity standards and consider the greater social needs of patient populations through the Quintuple Aim as your wellbeing work progresses.

## Quintuple Aim Quality Improvement Model

Quintuple Aim Quality Improvement incorporates human factors into the Triple Aim model, considering professional wellbeing and health equity as key, necessary elements.



Figure 1

# How to Add Professional Wellbeing to a Quality Improvement Project

Here are three steps you can take to add professional wellbeing as a key performance indicator in your hospital's quality improvement efforts.



**Gather information about administrative or operational burdens and set priorities**



**Identify an existing quality improvement project**



**Add professional wellbeing measures**

## Gather Information About Administrative or Operational Burdens and Set Priorities

To get started, clinical representatives on your Professional Wellbeing Team, such as department chairs and front-line clinicians, should ask staff about administrative or operational burdens that impact their work. They can also ask for input about potential solutions, but keep in mind that this conversation should not place additional responsibilities on staff. Clinical representatives can collect information through discussions during department meetings, informal conversations, or a quick, anonymous survey. It may also be helpful to ask support staff, such as housekeeping and food service, about operational burdens. Once they have received input, your Professional Wellbeing Team should meet to discuss the reported burdens and align on priority areas the team could address.

Based on your discussion, the Executive Sponsor should assign one member of the Professional Wellbeing Team to lead the rest of this Action. If your team includes staff from your hospital's Patient Safety and Quality Team, they should lead this effort. The [Quadruple Aim Quality Improvement Guide](#) can help facilitate your team discussions and work moving forward.

## Identify an Existing Quality Improvement Project

Next, the Professional Wellbeing Team representative should meet with your hospital's Patient Safety and Quality Team to discuss and get input about your team's proposed priorities. Together, identify which existing quality improvement projects could help address the prioritized burdens and choose one to focus on.

**To choose a project, consider:**

- 1 which project may benefit most from Quadruple Aim Quality Improvement,
- 2 whether your hospital can measure the impact of a project on professional wellbeing, and
- 3 whether a project requires any necessary changes.

Rather than adding new workstreams to existing wellbeing projects, it is important to identify a project that does not already address wellbeing and examine its impact on healthcare workers.

**EXAMPLE:**

*There's an initiative at your hospital to discharge patients by 11:00 AM so you can reduce Emergency Department holds, as most new patients are admitted in the afternoon. This early discharge initiative is intended to ease staffing later in the day. However, after talking to your workforce, you realize that this interrupts their typical workflow by adding or distracting from existing tasks. Everyone from physicians and nurses to housekeeping staff working the morning shift is negatively affected. Instead, you might think about how to rework their typical workflow, add staff to accommodate the needs, or reportion staff hours to get the work done. By choosing this early discharge initiative as the ongoing quality improvement project you want to focus on, you're able to consider its impact on your workforce in addition to other existing key performance indicators.*

Use the [Quadruple Aim Quality Improvement Guide](#) to help you choose a project to review and update. You may face challenges determining where projects occur, as different committees may run different quality improvement projects. It will be important to engage members of your Professional Wellbeing Team across departments and roles to identify and prioritize projects and wellbeing measures. Remember that shared leadership and inclusivity within your committee structure are important in decision-making.



**In working on Action 5, I reached out to our hospital's director of quality. I told her what was going on, and she was really helpful at making recommendations as to some metrics we have in place and how to best integrate professional wellbeing so that it's added on to something that we're already tracking.**

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**Note:** It is essential that this work is not siloed. You will need to collaborate with the Patient Safety and Quality Team at your hospital and engage any staff who are already leading quality improvement projects as partners. This is especially important as you identify and prioritize projects your wellbeing work will address.

## Add Professional Wellbeing Measures to Your Project

Once the Professional Wellbeing Team and the Patient Safety and Quality Team have determined a project to focus on, they should work together to set specific and measurable goals related to professional wellbeing. You will want to set goals that you can track over time and as you make changes within your hospital. Use the [List of Professional Wellbeing Measures](#) to identify which wellbeing-focused key performance indicators to integrate into your existing quality improvement project. Though timeframes will vary from project to project, your Patient Safety and Quality Team should aim to analyze metrics across six months. You want to allow ample time for changes to take hold.

By incorporating professional wellbeing measures into an existing, “non-wellbeing-focused” project, you will start to measure the project’s impact on your workforce as a key outcome to its success.

**Note:** As you progress through this Guide, the Patient Safety and Quality Team can use assessment tools listed in [Action 6](#) to track professional wellbeing.

### EXAMPLE:

*Patient care staff report feeling burnout because they are spending too much time on administrative tasks like charts or emails. Your Professional Wellbeing Team’s representative and your Patient Safety and Quality Team may decide to focus on the ongoing integration of a new Electronic Health Record system or increasing efficiency in your existing system. From there, you’ll work together to define a professional wellbeing measure to use in evaluating the success of this project. For example, you could aim for a reduction in time spent on work outside of the hospital. Work with your Chief Medical Information Officer to track time healthcare workers spend on email at one-, three-, and six-month intervals throughout the change. By incorporating this professional wellbeing measure into your existing metrics, you will not only track potential cost savings and patient outcomes, but also the impact these efforts have on your workforce in a quantifiable way.*

**Note:** Use the Communication Plan created in Action 4 to share information about the quality improvement project with your workforce. Update them on progress towards your goals.



Action 5 helped us to look at the work that is already being done in our market and think about how we can augment that, specifically around goal setting. We were more program-focused rather than outcome-focused and quantifying certain aspects of the program. We are starting to think in those terms now.

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## Moving Forward

To fully achieve Quadruple Aim Quality Improvement, every quality improvement project within your hospital should ultimately include professional wellbeing measures. Action 5 focused on identifying and executing one project. As part of Action 6, you will identify ways to ensure professional wellbeing is considered across all your operational and administrative improvement efforts moving forward.



## How to use this guide:

- Use the guide below with your hospital’s Patient Safety and Quality Team to choose an ongoing quality improvement project not related to wellbeing.
- Fill this sheet out together or use the questions to spark conversation.
- Once you’ve chosen a project, use the List of Professional Wellbeing Measures to identify which key performance indicators you will integrate into this project.

To integrate Quadruple Aim Quality Improvement into your ongoing quality improvement efforts, consider the following questions with your hospital’s Patient Safety and Quality Team:

### 1. What are your ongoing quality improvement projects?

Notes:

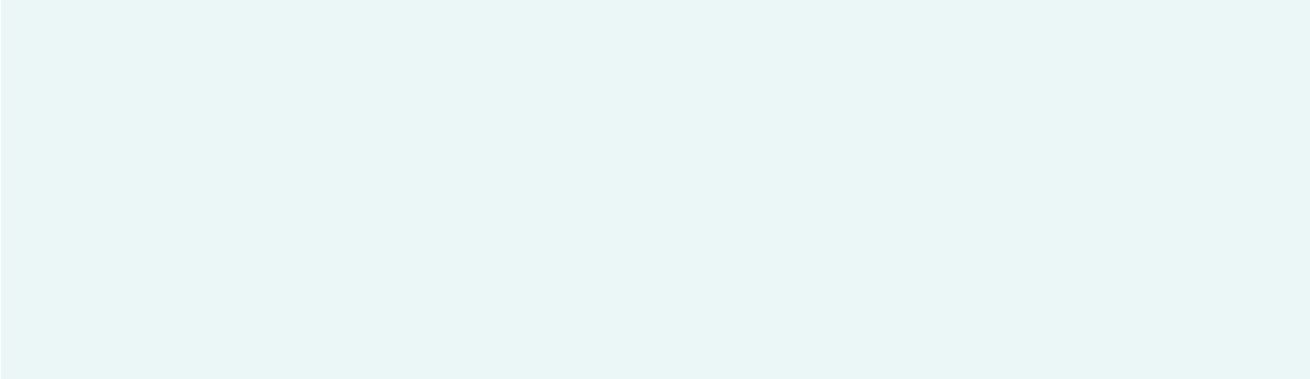
### 2. Which ongoing quality improvement projects are the highest priority?

Notes:



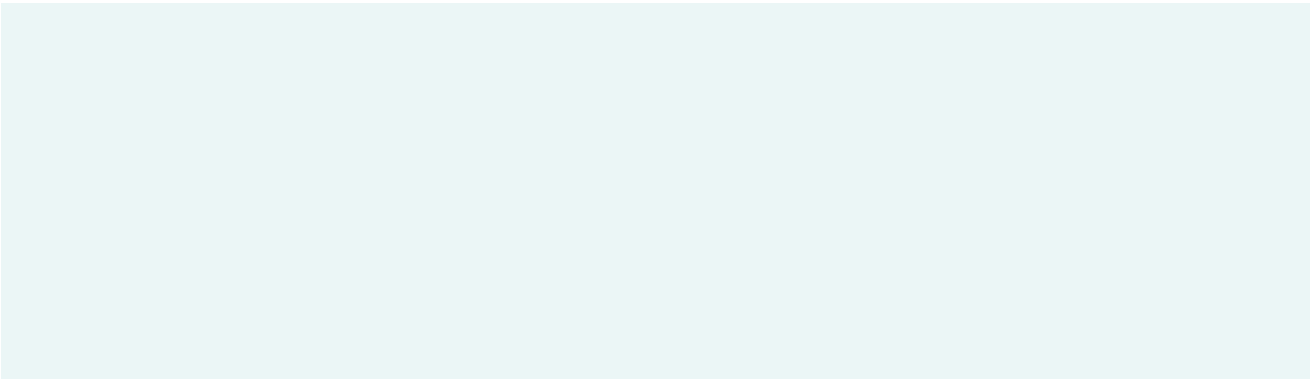
**3. Which existing quality improvement projects have the greatest potential impact on professional wellbeing?**

Notes:



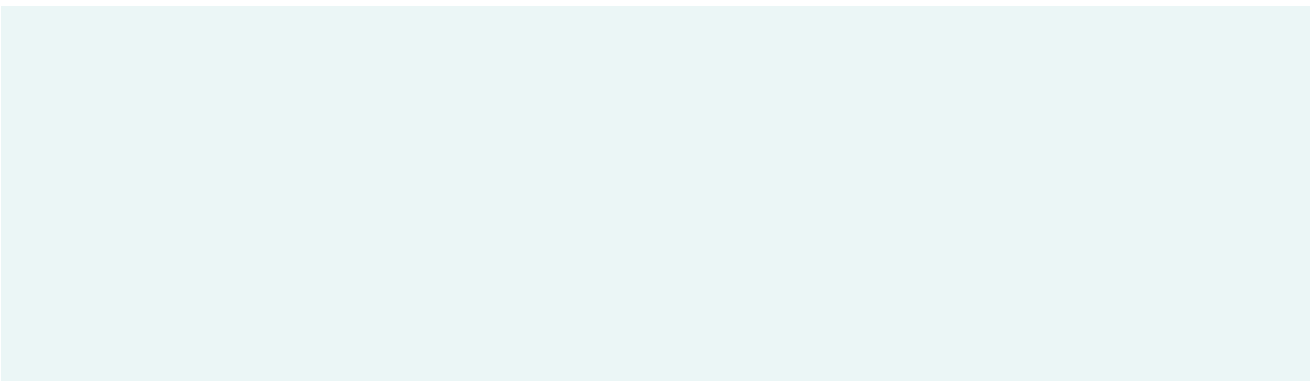
**4. Can your hospital measure the impact of these projects on professional wellbeing?**

Notes:



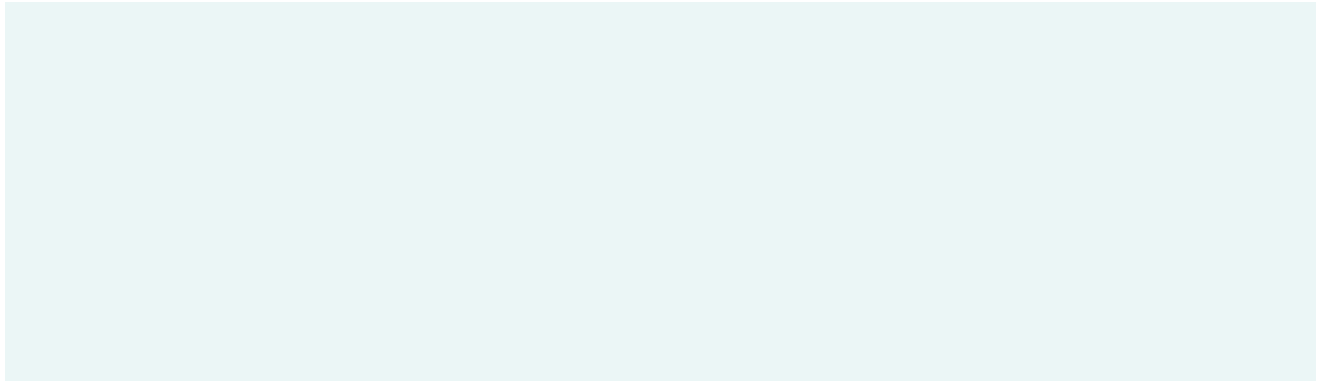
**5. What ongoing quality improvement projects might already address professional wellbeing?**

Notes:



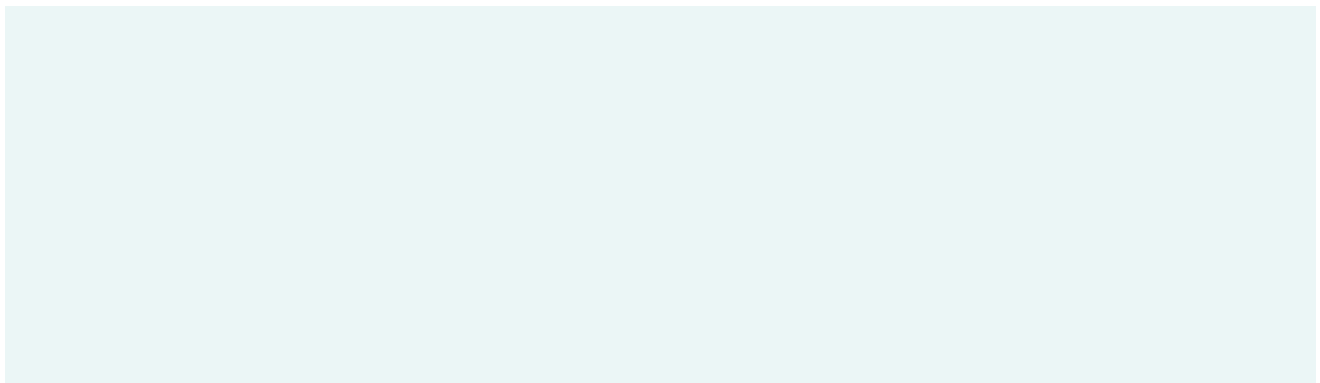
**6. How can your hospital incorporate professional wellbeing measures into ongoing or planned projects?**

Notes:



**7. How might the ongoing or planned projects need to change to incorporate professional wellbeing measures?**

Notes:



Remember that you do not need to implement Quadruple Aim Quality Improvement into all projects at one time – nor do you need to introduce all possible professional wellbeing measures at once. After implementing Quadruple Aim Quality Improvement into an initial set of projects, reiterate these efforts in other ongoing or future projects. Prioritize projects that appear to be causing the most challenge to the greatest number of staff.

Eventually, you should aim to implement Quadruple Aim Quality Improvement into all future quality improvement projects that may impact the wellbeing of your workforce, making this standard practice.



## How to use these measures:

Review the list below to determine specific and measurable goals that you can track over time and identify which indicators of professional wellbeing your team wants to measure.

- Use this list after coordinating with the Patient Safety and Quality Team at your hospital to choose your quality improvement project.
- Work with the Patient Safety and Quality Team and other hospital staff who may already analyze key performance indicators metrics to capture and track your wellbeing measures. In Action 6, you'll find measurement tools for longer-term evaluation, which you may want to use to evaluate the success of the indicators you select below.

## Professional wellbeing measures to consider:

- Leading indicators (meaning predictive measurements) might include:
  - A reduction in time spent on hospital work outside of work hours.
  - A reduction in the amount of time healthcare workers spend reading messages in their inbox.
  - A decrease in the number of nightshifts worked by non-nocturnists.
  - An increase in uninterrupted or focused work time.
- Lagging indicators (meaning output measurements) might include:
  - A decreased difference between the number of actual hours worked by healthcare workers and the number of ideal hours.
  - A reduction in the amount of time that workers are unexpectedly absent from work, not including sick leave.
  - A reduction in staff turnover.
  - A reduction in involuntary terminations.
  - An increase in the amount of positive feedback received from healthcare workers.
  - Improved patient experience scores.

## If choosing a measure not on this list, make sure it is:

- Measurable
- Trackable (on a regular basis)
- Changeable
- Important to healthcare workers



# 6

## Develop Your Long-Term Professional Wellbeing Plan

Action 1



Action 3



Action 5



Action 2



Action 4



Action 6



# Action 6:

## Develop Your Long-Term Professional Wellbeing Plan

### Purpose:

The purpose of Action 6 is to develop a Professional Wellbeing Plan that sustains your hospital's commitment to professional wellbeing.

### Key Concept

To sustain an environment where healthcare workers thrive, it is essential to create a long-term Professional Wellbeing Plan.<sup>1</sup> The plan should include goals for individual support, measurement, and operational improvement over three specific time periods.

### Action Items

- Develop a Professional Wellbeing Plan.
- Share your Professional Wellbeing Plan with your staff.

### Expected Outcome

- Completed a Professional Wellbeing Plan

### Resources Provided

- Professional Wellbeing Plan Outline



## About Your Professional Wellbeing Plan

A Professional Wellbeing Plan describes what goals you and your Professional Wellbeing Team will accomplish over the next three, six, and twelve months. Making a plan is essential to sustaining your hospital's commitment to professional wellbeing. It helps your team stay accountable, on-task, and mindful of your healthcare workers' specific needs beyond the Actions in this Guide. As you move forward, take a unit-based approach to implementing and measuring operational changes through your Professional Wellbeing Plan. The Professional Wellbeing Team can recommend actions to be carried out at the supervisory level as well. This helps infuse wellbeing throughout every unit and level of leadership and helps keep the workload of the Professional Wellbeing Team reasonable.

# How to Develop Your Professional Wellbeing Plan

Here are three steps that your team can take to plan for continued work on professional wellbeing initiatives:



**Hold a meeting  
with your  
Professional  
Wellbeing Team**



**Select goals  
that will  
fill a need in  
your hospital**



**Share your  
Professional  
Wellbeing Plan  
with staff**

## How to Develop Your Professional Wellbeing Plan

The most effective way to create a Professional Wellbeing Plan is to collaborate with your Professional Wellbeing Team to set short-term and long-term goals. It is also essential to determine with which staff you will need to partner for each goal.

**Note:** Some of your potential partners may already be members of the Professional Wellbeing Team. If so, work with them to identify any additional partners or staff needed to help meet your goals.



I think that setting goals at certain intervals makes sense in our healthcare brains. That's how we function. We set goals and we set them incrementally, and having something with a plan outlined that was easy to follow [and] easy to understand and translate to our healthcare brains [was nice].

**COMMONSPIRIT HOSPITAL LEADER**



**As the Executive Sponsor, you should lead this charge and bring together your Professional Wellbeing Team to:**

- 1 Develop the plan,
- 2 Identify partners and assign responsibility for each goal,
- 3 Ensure ongoing leadership support, and
- 4 Eliminate operational barriers from interfering with your team's progress.

Meeting these four objectives may require more than one meeting. You may wish to include other members of your staff to support you, including healthcare workers across diverse job categories and titles. Below are some guiding questions to help you lead this and future meetings:

- 1 Reflect on the actions you have already taken to improve professional wellbeing at your hospital (e.g., removing stigmatizing credentialing questions, creating a Professional Wellbeing Team).
  - How has your workforce responded to these actions?
  - Has your workforce provided any feedback on what else would be helpful?
- 2 What are your professional wellbeing priorities over the next 12 months?
- 3 What are the barriers to implementing professional wellbeing initiatives across your hospital?

Your team can also reflect on the outcomes of your [Hospital Review Worksheet](#) in Action 1, and the quality improvement priorities that you identified in Action 5.

**Note:** Consider conducting an anonymous survey of healthcare workers to ask:

1. What top two experiences give you the most meaning in your position?
2. What are the top two stressors that affect your ability to do your job in taking care of patients?
3. What practical solutions do you have to improve these stressors?

The results of this survey can help your team determine the potential for impact as well as the feasibility of potential interventions. This also ensures that your goals align with healthcare worker feedback.

## Select Goals That Will Fill a Need in Your Hospital

Use the [Professional Wellbeing Plan Outline](#) to determine your long-term Professional Wellbeing Plan goals. You will be most successful in selecting goals if you integrate the exercise into the existing structure and timelines of your hospital's goal-setting activities. You may also find it helpful to go back to your review of hospital operations (Action 1) to determine how existing wellbeing activities can fit into your long-term plan.

Your plan should include the following categories:<sup>1,2</sup>

- 1 Individual Support Goals:** Focus on improving individual professional wellbeing among staff.
- 2 Measurement Goals:** Focus on continuously assessing professional wellbeing among staff.
- 3 Operational Improvement Goals:** Focus on implementing operational changes that support professional wellbeing.

**Note:** Within your plan, make your goals specific, measurable, actionable, realistic, and time-bound, or SMART.<sup>54</sup>

For each of these categories, list your goals by intervals of three-, six-, and 12-month timeframes. The 12-month goal you identify is a long-term goal. While these intervals are recommended, they may be adjusted based on what makes reasonable sense for your hospital or system.

It’s important that your Professional Wellbeing Team meets regularly to assess progress towards the long-term goals and make course corrections as needed. Examples of these goals against each category are below for your reference.

**EXAMPLE GOALS BY CATEGORY**

Goal	Month 3	Month 6	Month 12
<p><b>Individual Support Goal:</b> Build a Peer Support Network</p>	<p>By the end of month 3, department chairs on the Professional Wellbeing Team will have each identified 5 healthcare workers to become peer support leaders. These department chairs will have met and identified a training resource.</p>	<p>By the end of month 6, department chairs on the Professional Wellbeing Team will have fully trained the identified peer support leaders using the training resource identified by month 3.</p>	<p>By the end of month 12, the peer support leaders will be active across departments and have provided support to at least 3 peers each.</p>



Goal	Month 3	Month 6	Month 12
<p><b>Measurement Goal:</b> Assess Professional Wellbeing of Your Workforce</p>	<p>By the end of month 3, the Patient Safety and Quality Team will have identified and vetted 1 tool to directly measure professional wellbeing among the workforce (see the <a href="#"><u>National Academy of Medicine List of Survey Instruments to Measure Burnout</u></a>).</p>	<p>By the end of month 6, the Patient Safety and Quality Team will have conducted their first measurement of professional wellbeing among at least 1 healthcare worker group (nurses, physicians, technicians, etc.), via the selected tool.</p>	<p>By the end of month 12, the Patient Safety and Quality Team will have analyzed all the findings from their first measurement and communicated the outcomes to their workforce.</p>
<p><b>Operational Improvement Goal:</b> Train All Quality Improvement Leaders in the Quadruple Aim Approach</p>	<p>By the end of month 3, Executive Sponsor will identify all people at your hospital working on quality improvement (including the Patient Safety and Quality Team and any other individuals).</p>	<p>By the end of month 6, the Executive Sponsor will educate people working on quality improvement about the Quadruple Aim and its importance.</p>	<p>By the end of month 12, the Patient Safety and Quality Team will implement professional wellbeing measures into 50 percent of all existing quality improvement projects.</p>

**Note:** To further help your efforts, project management tools can help you manage your timeline, identify needed resources, and track team members involved in your plan. You can use a responsibility assignment matrix, or RACI (responsible, accountable, consulted, and informed) chart, to help you determine who on your Professional Wellbeing Team is responsible, accountable, consulted, and informed of your ongoing wellbeing work.<sup>55</sup>

In addition to leading measures of professional wellbeing, hospitals can also consider including lagging measures of professional wellbeing. For example, hospitals can work to quantify the costs of burnout (e.g., turnover or replacement costs) within their organizations and then incorporate and monitor cost-saving measures that support professional wellbeing as part of their 12-month plan.

**When developing goals, consider the following topics:<sup>i</sup>**

- **Workplace violence and harassment** – Help healthcare workers feel safe by ensuring their wellbeing is as valued as much as patient satisfaction.
- **Staffing** – Adequate staffing can improve both worker and patient safety.
- **Health equity** – Staff from racial and ethnic minority groups may experience burnout differently and have different communication needs.

**Share Your Professional Wellbeing Plan with Staff**

Share your Professional Wellbeing Plan with your workforce, ideally within one week of completion. It is also essential to update your workforce about progress at three-, six-, and 12-months. Adapt and use the **Communication Plan Outline** and sample email in Action 4 to share your plan and updates towards your goals with staff. This informs your healthcare workforce about the work you are doing and creates opportunities for input.

**Track Your Progress**

**Use Assessment Tools to Track Wellbeing**

The following tools are validated for use in healthcare settings to measure factors related to professional wellbeing.<sup>56,viii</sup> The Executive Sponsor and your hospital’s Patient Safety and Quality Team can use the below list to select a tool that enables you to measure factors related to your team’s projects and goals. It is important to strive to maintain anonymity for staff in administering any of the following tools.

Organization	Tool	Description
<b>The National Institute for Occupational Safety and Health</b>	<b><u>NIOSH Worker Well-Being Questionnaire (NIOSH WellBQ)</u></b>	A tool that provides an assessment of worker wellbeing across multiple spheres, including individuals’ quality of working life, circumstances outside of work, and physical and mental health status
<b>Stanford School of Medicine</b>	<b><u>Stanford Professional Fulfillment Index</u></b>	A tool to assess professional fulfillment and burnout based on interventions and other factors affecting wellbeing

<sup>viii</sup> Mention of any company or product does not constitute endorsement by the National Institute for Occupational Safety and Health, Centers for Disease Control and Prevention.

<b>Organization</b>	<b>Tool</b>	<b>Description</b>
<b>Mayo Clinic</b>	<u><a href="#">Well-being Index</a></u>	A tool to measure healthcare worker wellbeing, report findings, and conduct ongoing reassessments
<b>American Medical Association</b>	<u><a href="#">Organizational Biopsy</a></u>	A short assessment that focuses on identifying burnout risk and drivers of burnout within your hospital
<b>National Academy of Medicine</b>	<u><a href="#">Valid and Reliable Survey Instruments to Measure Burnout, Well-Being, and Other Work-Related Dimensions</a></u>	A compilation of validated surveys to assess burnout, professional wellbeing, and other related factors
<b>American Association of Critical-Care Nurses</b>	<u><a href="#">AACN Healthy Work Environment Assessment Tool</a></u>	A screening tool to identify work environment related problems and evaluate progress
<b>Mind Garden (Maslach C, Jackson SE, Leiter MP, Schaufeli WB, &amp; Schwab RL)</b>	<u><a href="#">The Maslach Burnout Inventory™</a></u>	A tool to measure the extent, pattern, and cause of burnout
<b>American Nurses Association</b>	<u><a href="#">ANCC Pathway of Excellence Framework</a></u>	A framework that depicts the six standards that are essential elements in developing a positive practice environment for nursing across a variety of healthcare settings including acute care and long-term care

You should plan to report and share the findings of your assessment with leadership and your workforce. Data from the assessment should be used to routinely update hospital operations in support of professional wellbeing.

**Note:** In conducting your assessment, be sure to reflect on the administrative burdens and priorities you set in Action 5. Specifically, consider the responsibilities healthcare workers have outside of clinical work. Identifying these burdens can help you minimize them, increase efficiencies, and make it easier for healthcare workers to provide high-quality patient care.<sup>1</sup>

## Moving Forward



I think it's time to put the onus of responsibility on the hospital's leadership to get together and say, it's time to talk about this, folks. If you haven't already done it, it's time to sit down and start working out a plan for how we do it because, again, as we evolve with our systems-level of support, it's not all the support that's necessary and needed, [so] as we evolve with that, our hospital leadership will be able to [also].”

**COMMONSPIRIT SYSTEMS LEADER**



While developing a plan helps set up your hospital for long-term progress, it also affirms how much you care about your healthcare workers. Over time, you will expand your goals to build on your continued efforts. Ensure that you continuously review and update your Professional Wellbeing Plan so that it is maintained and used. Aspire to make the plan fully transparent to hospital staff by keeping it in a central place where it is readily accessible and highly visible to both internal and external stakeholders. By taking these first steps and putting in place systems for two-way communication and ongoing feedback, you can foster an environment that will strengthen and support the workforce in the months and years to come.



## How to use this plan:

- Use the following chart to help identify what goals your Professional Wellbeing Team will accomplish over the next 12 months.
- List your goals by intervals of three, six, and 12 months for each of the categories (individual support, measurement, and operational).
  - **Individual Support Goals:** Focus on improving individual professional wellbeing among staff.
  - **Measurement Goals:** Focus on continuously assessing professional wellbeing among staff.
  - **Operational Improvement Goals:** Focus on implementing operational changes that support professional wellbeing.
- Choose whether you'd like to add an ownership column as you decide which team members should be responsible for and lead each goal.

Goal	Month 3	Month 6	Month 12
<b>Individual Support Goal:</b>			

<b>Goal</b>	<b>Month 3</b>	<b>Month 6</b>	<b>Month 12</b>
<b>Measurement Goal:</b>			
<b>Operational Improvement Goal:</b>			

# Looking Ahead

## You have successfully shown your commitment to improving the professional wellbeing of healthcare workers at your hospital.

Through your actions, you have demonstrated hope for a future where healthcare workers do not have to sacrifice their own wellbeing while delivering exceptional patient care. Your work provides equitable support and creates a culture of compassion that our nation's healthcare workers need and deserve.

You are now well-positioned to build upon this achievement and support your workforce in the months and years to come. You have made tremendous strides to improve the current state of professional wellbeing, and you still have work to do. As hospital leaders, your genuine care for a group that has dedicated their lives to others will continue to drive change at your hospital.



For additional resources on how to improve professional wellbeing at your hospital, visit the [Impact Wellbeing website](#). This page includes helpful tools, materials to communicate directly to your workforce, and updates from the National Institute for Occupational Safety and Health about ongoing wellbeing work.



# Appendices



## APPENDIX A.

# References

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## APPENDIX B.

# Additional Resources

Below is a curated list of additional resources from the field you can use at any point in your journey to find more information about professional wellbeing. Some of these resources were referenced in the Guide already, while others are new to this appendix<sup>ix</sup>

- American Association of Critical-Care Nurses [n.d.]. [Healthy work environments](#). Aliso Viejo, CA: American Association of Critical-Care Nurses.
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<sup>ix</sup> Mention of any company or product does not constitute endorsement by the National Institute for Occupational Safety and Health, Centers for Disease Control and Prevention.

## APPENDIX C.

# Responses to Common Questions and Concerns from Leadership and Colleagues

Below, find frequently asked questions and answers to help you hold conversations with hospital leadership and colleagues about this Guide as needed.

### 1. “Why should we use this resource?”

- The *Impact Wellbeing* Guide was informed by six CommonSpirit hospitals in varying regions within the United States, over a six-month testing effort. It was revised based on real-world feedback from leaders at these hospitals to ensure that its content was clear, and steps were achievable.
- The Guide builds on and centralizes the work of many organizations like the American Hospital Association and American Medical Association who have made strides to address healthcare worker burnout. It provides the necessary background and actionable tools to support professional wellbeing across every hospital division and role.
- By moving through the Actions in the Guide, hospital leaders will make purposeful systems-level changes that lay the foundation for sustainable improvements in professional wellbeing, ultimately creating a thriving healthcare workforce.

### 2. “My hospital is already doing wellbeing work.”

- No matter where your hospital stands in its wellbeing journey, the *Impact Wellbeing* Guide can help. Even if your hospital already has existing programs in place, the Guide serves as a catalyst for your hospital to accelerate wellbeing efforts.
- We encourage leaders to read through the full Guide, no matter the state of wellbeing at their hospital, to glean meaningful insights along the way that can supplement existing work or expand your perspective. For example, if your hospital has been focused on individual support resources, the Guide will help you go beyond building resilience to address the underlying factors that impact healthcare worker wellbeing.
- The Guide can also help increase access and utilization of current mental health and wellbeing services in place for healthcare workers.

### 3. “This is part of HR’s role, not mine.”

- While human resource professionals contribute to wellbeing work, hospital leaders are responsible for making systems-level changes that will truly impact wellbeing at the operational level.
- According to the National Academy of Medicine’s *Taking Action Against Clinician Burnout* report, addressing workplace policies and practices is the best way to reduce burnout and support healthcare worker wellbeing.<sup>X</sup> Human resource professionals cannot address process and operational burdens that are major contributors to burnout and demoralization. Hospital leaders are uniquely positioned as coordinators, connectors, and facilitators of this work.

#### 4. “We don’t have enough time to do any additional wellbeing work.”

- The *Impact Wellbeing* Guide can be completed at leaders’ own pace, based on their schedule and availability. It provides step-by-step instructions to give a sense of the length of time and who should be involved in each Action, so leaders can plan accordingly.
- We know that hospital leaders may lack resources to do this work. As a free resource, the Guide is designed to be flexible based on the resources on hand. We encourage hospital leaders to involve staff who are passionate about this work in their wellbeing team (created in Action 2) to carry out these activities, and they should be included regardless of their position.

#### 5. “We don’t have enough resources to do additional wellbeing work.”

- Burnout is costly across many different healthcare departments and job categories.<sup>xi,xii,xiii</sup> By addressing professional wellbeing now, hospital leaders are protecting their healthcare workers and system down the line.
- By identifying and implementing practical organizational adjustments, leaders can improve retention and help healthcare workers continue doing what they do best – delivering the highest quality patient care.

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<sup>x</sup> National Academies of Sciences, Engineering, and Medicine [2019]. [Taking action against clinician burnout: A systems approach to professional well-being](#). Washington, DC: The National Academies Press.

<sup>xi</sup> Muir JK, Wanchek TN, Lobo JM, Keim-Malpass J [2022]. [Evaluating the costs of nurse burnout-attributed turnover: A Markov modeling approach](#). *J Patient Saf* 18(4):351-357.

<sup>xii</sup> Han S, Shanafelt TD, Sinsky CA, Awad KM, Dyrbye LN, Fiscus LC, Trockel M, Goh J [2019]. [Estimating the attributable cost of physician burnout in the United States](#). *Ann Intern Med* 170(11):784-790.

<sup>xiii</sup> American Medical Association [2018]. [Organizational cost of physician burnout](#). Chicago, IL: American Medical Association.



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