

Engaging Excellence

**Employer of Choice
Implementation Plan and Approved Funding
January 16, 2008**

**Presented by:
Wanda Thompson
Patty Brecht
Eric Frost**



EOC Team Membership

- **Chair: Sara Grethlein, MD**
Graduate Medical Education
- **Vice Chair: David Northrup**
SUNY Upstate Medical University Council
- **Facilitator: Barbara Riggall**
Organizational Training & Development
- **Recorder: Anne Peer**
Department of Emergency Medicine
- **Executive Council Sponsor(s):**
 - **Steve Brady**
Finance and Management
 - **Wanda Thompson**
Office of the President
- **BJ Adigun** -*Pediatric Administration*
- **Doug Joseph** - *Physical Plant*
- **Eric Frost** -*Human Resources*
- **Jim Legault** -*Clinical Practice Analysis*
- **Jodie Purdy, RN** -*Nursing Recruitment Office*
- **Kathy Faber-Langendoen, MD** -*Bioethics and Humanities*
- **MaryAnn Merklein** -*Medical Staff Office*
- **Nancy Towne** -*Nursing Administration*
- **Pat Knox** -*Palliative Care*
- **Patty Brecht** -*Human Resources*
- **Paul Seale** -*Hospital Administration*
- **Rev Jerald Shave** -*Volunteer Initiatives*
- **Zanette Howe** -*Marketing and University Comm*
- **Gwynne Conway** –*Nursing Administration (formerly Financial Services)*
- **Mark Zeman** - *IMT Operations and Networking (Ad Hoc Team Member)*

Additional Contributors

- **Darryl Geddes – Public Relations**
- **Edgar Johnson - Office of Diversity and Affirmative Action**
- **Holly McCurdy – Human Resources**
- **Katie Mooney – Nursing Administration**
- **Lisa Brackett – Patient Support Services**
- **Lisa Tesorio – Human Resources**
- **Lynn Cleary – College of Medicine**
- **Margaret Bourke – Public Relations**
- **Mary Wasilewski – Human Resources**
- **Maxine Thompson – Office of Diversity and Affirmative Action**
- **Megan Chase – Human Resources**
- **Paul Grover – College of Medicine**

Engaging Excellence Time Frame

- Year 1 – January 2008
- Year 2 – January 2009
- Year 3 – January 2010
- Year 4 – January 2011
- Year 5 – January 2012
- Year 6 – January 2013
- Year 7 – January 2014
- Year 8 – January 2015
- Year 9 – January 2016
- Year 10 – January 2017

Employer of Choice Recommendations

- Review and Analysis of HR Functions
- Human Resources Initiatives
- Civility Committee
- Human Resources Institute
- Employee Recognition
- Enhance Diversity
- Effective Communication Plan
- Staffing Effectiveness
- Enhance Pride in Work Environment
- Brand Upstate as Employer of Choice
- Enhancing Quality of Work Life

Review/Response Process

Step 1

11 recommendations assigned to Sub-groups for draft responses

Step 2

Sponsors reviewed & finalized responses:
• Combined recommendations #2 and #3

Step3

Recommendations presented to Leadership Council on October 16th

Step 4

Establish EOC Committees and begin implementation



President

**Leadership
Council
(Sponsors)**

**Executive
Team**

**Employer of Choice
Steering Committee**

**Civility
Committee**

**HR Advisory
Council**

**HR Institute
Committee**

**Branding
Committee**

**Diversity
Task Force**

Role of Employer of Choice Steering Committee

Oversee and ensure initiatives are implemented
on time and within budget

Employer of Choice Steering Committee

Wanda Thompson, Chairperson

- Eric Frost
- Patty Brecht
- Paul Seale
- Elvira Szigeti
- Greg Threatte
- Hugh Bonner
- Kim Utter
- Joni Hinds
- Lynn Cleary
- Eric Smith
- Nursing Leadership Designee

Quick Wins Summary

- Performance evaluation process enhancements
- 45-day new hire follow up program established
- Affirmative Action Plan on web
- Absenteeism reporting tool to show unit/department info.
- Reduced oversight by the Position Control Committee for UH positions
- Exit survey implemented for campus employees
- Customer service standards implemented for UH employees
- Employee satisfaction survey results on Upstate web

Quick Wins Summary

- HR Customer Service Survey completed and results on Upstate web
- Physical Plant upgrades
- On-call rooms assessed
- Training needs assessment completed
- Plan to establish a common phone number for calls regarding facilities
- UH lobby ATM to be replaced; two more for WH and CAB

RECOMMENDATION #2 and #3 – Priority #1(a) and 1(b) Review and Analysis of HR Functions

Implementation Plan

1. HR Advisory Council

2. HR Service Enhancements

3. HR Initiatives

4. Organizational Scorecard

HR Advisory Council Membership

Eric Frost and Patty Brecht – Co-Chairs

- Doug Joseph
- Pat Knox
- Steve McClintic
- BJ Adigun
- Maryann Merklein
- Jim Lake
- Deb Tuttle
- Sondra Mott
- Sue Graham
- Sharon Franceschi

Review:

- HR customer service survey results
- Feedback from focus groups
- Environmental scan
- Employee satisfaction surveys
- Consultant reports and information received from best in class HR organizations
- Strategies for improvement initiatives and potential structural and programmatic changes

Role of HR Advisory Council

Assist with:

- Development of HR goals and initiatives
- Establishment of future/expected performance standards for HR
- Providing regular feedback on HR performance
- Providing a forum for employees to have candid and constructive discussions related to HR issues
- Development, implementation and analysis of employee surveys
- Sounding board for new HR policies, procedures and communications

Review and Analysis of HR Functions and Human Resources Initiatives

Requested Funding

Fee for consultant

HR Organization
Membership and Conference
Fees - annual

Software, New Equipment
and Supplies, to be
determined

Approved Funding

Year 1:

OTPS (one time): \$30,000
consultant fee

RECOMMENDATION #6 – Priority #2 Civility Committee

Implementation Plan

1. Establish Committee Membership

2. Charge Committee

3. Committee Actions

Initial Civility Committee Membership

- Lisa Tesorio (Co-Chair)
- Maxine Thompson (Co-Chair)
- Mark Buttiglieri
- Sarah-Lee Ritchie
- Maryann Merklein
- Frank Tees

It is recommended that the civility committee membership include representation from campus, shared service and hospital departments. This group should consider including local union representatives and front line staff members.

Civility Committee

Requested Funding

Fee for consultant plus other expenses as determined by committee

Approved Funding

Year 2:
OTPS (one time): Up to \$20,000 consultant fee if recommended by Civility Committee and approved by EOC Steering Committee

RECOMMENDATION #7 – Priority #3 Human Resources Institute

Implementation Plan

1. Establish Committee Membership

2. Charge Committee

3. Committee Actions

HR Institute Committee Membership

Barbara Riggall, Chairperson

- Mike Allain
- Tammy Leher
- Diane Conklin
- Mary Teelin
- Joyce Mackessy
- Brad Long
- Dave Sikora
- Paula Trief
- Anthony Carey
- Edgar Johnson
- David French
- Holly McCurdy

Human Resources Institute

Requested Funding

3 FTEs

Consultant

Training materials,
conferences and web
development

Approved Funding

Year 1:

FTE: 1

OTPS (annual):

\$20,000 training materials

\$34,000 conferences and web
development

RECOMMENDATION #1 – Priority #4 Employee Recognition

Implementation Plan

1. Establish Recognition Coordinator/Office

2. Review Current Programs

3. Enhance Existing Programs

4. Develop New Programs

Employee Recognition

Requested Funding

Annual Financial support
for program

Office Equipment

1 FTE

Approved Funding

Year 1:

FTE: 1 (combine with Clinical
Enterprise *Patient First*
recommendation)

OTPS (annual): \$10,000

RECOMMENDATION #11 – Priority #5 Enhance Diversity

Implementation Plan

1. Establish Taskforce to reestablish
the Diversity Council

2. Recommendations in Progress

3. Urban internship/mentoring program

Proposed Taskforce to Reestablish Diversity Council

Maxine Thompson, Chairperson

- Sue Stearns
- Leola Rodgers
- Sara Grethlein
- Kevyn To
- Carlos Lopez
- Mary Wasilewski
- Janean Stewart
- Max Mozell
- Dave Sikora
- Wiezhen Tu

Enhance Diversity

Requested Funding

Web site and printed materials

Diversity events and support of diverse community organizations

Recruitment and Retention Activities, to include scholarships and internship opportunities

Approved Funding

Year 2:

OTPS (one time): \$30,000 for program development and create internship for students

Year 3:

OTPS (one time): \$75,000 for program development and create internship for students

Funding beyond Year 3 TBD

RECOMMENDATION #8 – Priority #7 Staffing Effectiveness

Implementation Plan

1. Workflow analysis

2. Determine 24/7 supervision needs and develop plans for improvement

3. Review and clarification of nursing roles

Staffing Effectiveness

Requested Funding

External consultant

Possible FTE dependent on results of analysis

Approved Funding

Year 1:

OTPS (one time): Up to \$40,000 consultant fee work flow analysis

RECOMMENDATION #9 – Priority #8 Enhance Pride in Work Environment

1. Work in Progress

2. Master Facility Improvement Plans

3. Response Times

4. Assigning “Ownership”

Enhance Pride in Work Environment

Requested Funding

Software = \$6,000

Funds to support approved improvements

Approved Funding

Master facility plan

RECOMMENDATION #5 – Priority #10 Enhancing Quality of Work Life

Implementation Plan

1. Employee Convenience

2. Day Care Facilities

3. Deferred Recommendations

Enhance Quality of Work Life

Requested Funding

Funding for ATM's and expansion of daycare

Bike Racks

Approved Funding

Child Care Facility at Four Winds

ATM installations across campus

Bike Racks

RECOMMENDATION #4 – Priority #6 Effective Communication Plan

Implementation Plan

1. IMT Steering Committee

2. Conduct Audit

3. Develop Policy/Standards

4. Institutional Design and
Data Development Office

Effective Communication Plan

Requested Funding

Survey services

2 FTEs

Approved Funding

Year 1:

FTE: 1 (shared with IMT recommendation)

OTPS (annual): \$20,000

RECOMMENDATION #10 – Priority #9 Brand Upstate as Employer of Choice

Implementation Plan

1. Establish Branding Committee – Tie Back to Communication Recommendation

2. Branding Initiative

3. Impact on Region

4. Greater Participation in Community Events by Employees

Branding Committee

- Melanie Rich
- Darryl Geddes
- Katie Mooney
- Paul Seale
- Max Mozell
- Hugh Bonner
- Lorraine Manzella
- Eileen Pezzi
- Leah Caldwell
- Lynn Cleary
- Sondra Mott

Brand Upstate as “Employer of Choice”

Requested Funding

Office Equipment

FTE: 1

Approved Funding

Year 1:

FTE: 1 (shared with IMT recommendation)

Employer of Choice Summary of Approved Expenses

Sponsor Priority	Rec Number	Recommendation	Time Frame	Approved OTPS	Approve FTE(s)	Total Approved Expenses
1(a)	2	Review & Analysis of HR Functions	Year 1	\$30,000	N/A	\$30,000
1(b)	3	HR Initiatives		Included with 1(a) above	Included with 1(a) above	Included with 1(a) above
2	6	Civility Committee	Year 1	\$20,000	N/A	\$20,000
3	7	Develop HR Institute	Year 1-2	\$54,000	1	\$129,000
4	1	Employee Recognition Program	Years 1-2	\$20,000	1	\$100,000
5	11	Enhance Diversity	Years 2 - 3	\$105,000		\$105,000
6	4	Effective Communication Plan	Year 1	\$20,000	1	\$60,000

Employer of Choice Response Summary

Sponsor Priority	Rec #	Recommendation	Time Frame	Approved OTPS	Approved FTE(s)	Total Approved Expenses
7	8	Staffing Effectiveness	Year 1	\$40,000	N/A	\$40,000
8	9	Facility improvements	Years 1-3		N/A	Funding under master facility plan
9	10	Brand development in region	Year 1		1	\$50,000
10	5	Enhancing Quality of Work Life	Years 1-3	\$1,000 Bike Racks	Deferred	\$1,000 Funding for ATM's and expansion of day care

Funding: \$535,000

FTEs: 4



*Thank you to all
Employer of Choice team members
and contributors*

