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
Step 1
11 recommendations assigned to Sub-groups for draft responses

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

Step 3
Recommendations presented to Leadership Council on October 16th

Step 4
Establish EOC Committees and begin implementation
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

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.
<table>
<thead>
<tr>
<th><strong>Requested Funding</strong></th>
<th><strong>Approved Funding</strong></th>
</tr>
</thead>
</table>
| Fee for consultant plus other expenses as determined by committee | **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)
## Summary of Approved Expenses

<table>
<thead>
<tr>
<th>Sponsor Priority</th>
<th>Rec Number</th>
<th>Recommendation</th>
<th>Time Frame</th>
<th>Approved OTPS</th>
<th>Approve FTE(s)</th>
<th>Total Approved Expenses</th>
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<tbody>
<tr>
<td>1(a)</td>
<td>2</td>
<td>Review &amp; Analysis of HR Functions</td>
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<td>HR Initiatives</td>
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<td>Included with 1(a) above</td>
<td>Included with 1(a) above</td>
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## Employer of Choice Response Summary

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<th>Sponsor Priority</th>
<th>Rec #</th>
<th>Recommendation</th>
<th>Time Frame</th>
<th>Approved OTPS</th>
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<th>Total Approved Expenses</th>
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<tr>
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<td>Staffing Effectiveness</td>
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<td>9</td>
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<td>Brand development in region</td>
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<td>$1,000 Bike Racks</td>
<td>Deferred</td>
<td>$1,000 Funding for ATM’s and expansion of day care</td>
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**Funding:** $535,000  
**FTEs:** 4
Thank you to all Employer of Choice team members and contributors