Preparing for Tomorrow
An Access Leadership Development Program

Lisa A. Woods, M.S., CHAM
Manager of Access Operations
WellSpan Health – York, PA
Learning Objectives

• Understand how WellSpan Health’s rapid growth drove the need for an internal leadership development program.

• Detail the various elements of the leadership development program, including what worked and what didn’t and what has changed over time.

• Discuss the challenges and successes of the leadership development program, including lessons learned, success stories, facilitation, participation, and relevance.
WellSpan Health System

• Integrated health system located in Central Pennsylvania

• 4 Acute Care Hospitals; 856 licensed beds – adding 2 additional hospitals in 2015 (acute care and inpatient psychiatric facility)
  • Level 1 Trauma Center & Primary Stroke Center

• 93 patient care locations across 4 counties and 2 states serving a population of 500,000; 60% overall market share

• Approx. 1,500 employees, physicians & volunteers

• 7 residency programs, 250 students and a Research Center
WellSpan Health System

- 6 retail pharmacy locations
- 755 member multi-specialty Medical Group; 90 practice sites
- Regional referral services in heart and vascular care, oncology, women and children services, orthopedics, neurosciences and behavioral health
- 2 regional homecare organizations
- PPO serving 50,000+ covered lives
- Provides more than $175 million each year in charitable, uncompensated care.
Established Acute Care Facilities

Joining in 2015
Working as one to improve health through exceptional care for all, lifelong wellness and healthy communities.
WellSpan Health 2014 Statistics

- 40,250 Inpatient Admissions; 38,000 Inpatient Discharges
- 1.7 million Medical Group Physician/Provider Visits
- 1.1 million Outpatient Encounters
- 138,500 Emergency Department Visits
- 74,000 Clinic Visits
- 41 million Lab Specimens and Nursing Home Labs Processed
- $1.2 Billion Annual Gross Revenue
- 30,000 Secured Messages Sent via Patient Portal
The Story Behind Our Journey

- Patient Access at WellSpan Health experienced expedited growth in our departments in a very short amount of time.
- This resulted in multiple promotions and the addition of many leadership positions.
- We had not developed internal prospects – forced to hire external candidates which was not successful and resulted in very poor retention.
- *How can we better prepare our departments internally for this continued growth and create a bench to pull from when a spot in the starting line up becomes available?*
<table>
<thead>
<tr>
<th>Year</th>
<th>Details</th>
</tr>
</thead>
</table>
| 2010 | - Reported up through Patient Financial Services; joint director  
      - 5 departments, approx. 100 employees  
      - Limited to a pre-registration call center, hospital central registration/admissions departments, ED registration & insurance verification |
| 2015 | - Patient Access is its own reporting line; director reports to CFO/SVP  
      - 13 departments, approx. 400 employees  
      - Expanded to provide services for our 75 Medical Group practices (3 dedicated departments) and expanded scope of responsibility in pre-service & hospital registration |
Where We Started - 2010 -
Plan = create a program to develop employees within our departments with the potential to be our next generation of leaders.

Who’s buy-in do we need? What does this look like?

Who would we put through the program? How? When? Where?

What would we want to teach them?

Do we have the support of our colleagues?
**Future Leaders of Access Was Born**

- **Mission** = To develop and foster our next generation of Access Leadership.

- **Purpose** = To build upon the experience, knowledge and relationships that currently exist across Patient Access.

**Class Scope**

**Participants**
- Team Leaders
- Special Interest Employees

**Facilitators**
- Manager of Hospital Access
- Quality & Education Coordinator
Program Guidelines

- Time Commitment & Communication with Supervisor
- Attendance at training sessions
- Preparation for training sessions and completion of assignments
- Participation in this program does not guarantee promotion into a leadership position within the Access department(s).

**VEGAS RULES APPLY.** What happens in the FLA program stays in the FLA program.

Bottom Line = what you get out of this program will be contingent upon what you put in.
Training Sessions = Classroom Style

• Every other month; monthly after mid-point check

• Leadership Curriculum
  • Principles of Leadership
  • Interpersonal Skills
  • Leadership Styles
  • Coaching & Mentoring; Corrective Action
  • Conflict Management
  • Leading Change Initiatives
  • What’s Next for You?
Program Elements

**Independent Leadership Development**
- FLA Book Club & Discussion Facilitation
- Leadership Classes offered by Organizational Learning & Development
- Career Goals & Résumé Building

**Networking/Personal Development**
- Icebreakers
- “My Journey”
- Shadowing
- Mentorship
- Mock Interviews
Road Blocks & Lessons Learned

Free Ride?

Hand-holding

Mentor Mentality

Level of Dedication & Participation

Busy Bees ≠ Leaders

Current Leaders vs. Growing Leaders

Lack of Standardization in Access Departments
Success Stories!!

During the 2013 Program
- Promotion #1: Team Leader to Supervisor
- Promotion #2: Staff to Team Leader

Since the 2013 Program
- Promotion #3: Team Leader to Supervisor
- Promotion #4: Team Leader to Quality & Education Coordinator
- Promotion #5: Team Leader to Supervisor
- Promotion #6: Team Leader to Office Manager
Where Do We Go From Here?

2013
- Recommendation of participants by supervisor
- No formal application process
- Mostly formal classroom training with monthly guidance by facilitator(s)
- Mentorship at end of program – far from home
- Program completed in calendar year

2014
- Open – participant applies for selection into program
- Formal application process
- Combination of classroom training & self-directed progression
- Mentorship at beginning of program – close to home
- Program does not need to be completed in one year’s time
Key Program Components

- Involvement is voluntary
- Required the approval of the employee’s manager
- Program participants assigned a mentor
- Two Learning Tracks – both must be completed
- Program does not guarantee a leadership position
- Program is self-directed and may require work to be done outside of normal working hours
## Class Scope

<table>
<thead>
<tr>
<th>Participants</th>
<th>Facilitators</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team Leaders</strong></td>
<td><strong>Manager of Access Operations</strong></td>
</tr>
<tr>
<td><strong>Informal Department Leaders</strong></td>
<td>MS in Organizational Development &amp; Leadership; BA in Communication Studies</td>
</tr>
<tr>
<td>Employees who have personally identified interest in pursuing leadership in the future</td>
<td><strong>Manager of Hospital Access Operations</strong></td>
</tr>
<tr>
<td></td>
<td>MBA; BS in Long Term Health Administration</td>
</tr>
<tr>
<td></td>
<td><strong>Access Quality &amp; Education Coordinator</strong></td>
</tr>
<tr>
<td></td>
<td>BS in Business Administration; pursuing MS in Organizational Development &amp; Leadership</td>
</tr>
<tr>
<td></td>
<td><em>past participant</em></td>
</tr>
</tbody>
</table>
# Track I – Access Leadership Core Curriculum

## Required = 37.5 contact hours

- Leadership Orientation *(3.0)*
- Emerging Leader Series *(total = 22.5)*
  - Management 101 – Emerging Leaders Series *(7.0)*
  - HR Management 101 *(5.5)*
  - Mastering Foundational Skills for Success *(2.0)*
  - Don’t Be Sorry You Said It *(4.0)*
  - The Greatest Motivator on Earth *(4.0)*
- Classroom Training & Assignment Completion *(12 hours)*

## Self-Selected = 12.5 contact hours

- Introduction to Human Resources *(4.25)*
- Establishing Performance Expectations *(3.0)*
- Diversity for Managers *(2.0)*
- Coaching for Performance *(3.0)*
- Finance Workshop *(6.5)*
- Taking Corrective Action *(2.0)*
- Conducting Effective Meetings *(1.0)*
- Other Sessions from LMS *(must be approved)*
Track II – Experiential Learning

• Develop Skill as a Leader
  • Attend/participate in two Access Managers Meetings
  • Attend two YHLT/GHLT meetings
  • Participate in current Leadership Book Club
  • Attend one KAHAM meeting

• Develop Skill as an Educator
  • Attend one Telephone Communication Techniques workshop
  • Develop a computer-based training program (PowerPoint)
  • Develop a policy & procedure
  • Deliver an education-based presentation at a department staff meeting

• Participate in at least two of the following:
  • Budget Preparation
  • Kronos Timekeeping Responsibilities
  • Develop and/or assist with Access projects (Lean)
  • Participate on a system-wide committee
Classroom Training Sessions

• 6 three-hour sessions focused on:
  • Interpersonal Skills & Conflict Management
  • Corrective Action, Coaching & Performance Appraisals
  • Résumé Building, Interview Techniques
  • Leading Change Initiatives
**Continued Program Elements**

<table>
<thead>
<tr>
<th>Independent Leadership Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>AOLCP Book Club &amp; Discussion Facilitation</td>
</tr>
<tr>
<td>Leadership Classes offered by Organizational Learning &amp; Development</td>
</tr>
<tr>
<td>Career Goals &amp; Résumé Building</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Networking/Personal Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Reflections</td>
</tr>
<tr>
<td>“My Journey”</td>
</tr>
<tr>
<td>Shadowing</td>
</tr>
<tr>
<td>Mentorship</td>
</tr>
<tr>
<td>Mock Interviews</td>
</tr>
</tbody>
</table>
Road Blocks & Lessons Learned

Manager Recommendations ≠ Crucial Conversations

High Expectations from our Mentors

Leadership Classes (Track I) = TOO MUCH

Current Leaders vs. Growing Leaders

Lack of Standardization in Access Departments

Still not finding our solid bench.
Success Stories!!

• **During the 2014 Program**
  • Promotion #1: Team Leader to Supervisor
  • Promotion #2: Staff to Team Leader
  • Promotion #3: Staffing & Scheduling Assistant to Supervisor
  • Promotion #4: Staff to Staffing & Scheduling Assistant
  • Promotion #5: Staff to QA Analyst

Since the 2014 Program

• Promotion #6: Staff to Team Leader
Overall Success Rate

<table>
<thead>
<tr>
<th>Category</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td>Promoted During Program</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Promoted After Program</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Total Promoted</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>
AOLCP Participant Leadership Retention in Access

- Promoted Internally in Access
- Promoted Externally in WSH
Likelihood of Remaining Participants Becoming Leaders

- Likely
- Not Likely
What We’ve Heard From Our Participants

• Classroom training and mentorships have been the most advantageous part of the program.

• The program is demanding; one must be invested and willing to put forth a considerable effort.

• Networking with other leaders and potential leaders has proven to have its rewards.

• Hearing other leaders’ journeys has inspired participants to be comfortable with their path.
Feedback.....Straight from the Leaders’ Mouths!
(video)
Heading into Year 3 – What Now?

2014
- Open – participant applies for selection into the program
- Formal application process – all those who applied and received approval from manager were accepted
- Classroom training & self-directed progression
- Mentorship at beginning of program – partnerships made close to home

2015
- Open to apply; must be recommended by manager
- Formal application process – recommended applicants participant an interview with Selection Committee
- Tailored classroom training; fewer outside requirements
- Mentorship at beginning of program – partnerships made by fit and career aspirations
Goal = Participants with TRUE potential ONLY
2015 Class Scope

Participants

6 Current Supervisors

- Newly promoted in Access
- In departments where other (promoted) leaders went through program – inequitable skills
- 2 Supervisors from recently acquired organization

5 Front-line Staff

- 1 team leader
- 1 Staffing & Scheduling Assistant
- 3 Level II Employees from our two rapidly growing departments

Facilitators

Manager of Access Operations
MS in Organizational Development & Leadership; BA in Communication Studies

Access Quality & Education Coordinator
BS in Business Administration; pursuing MS in Organizational Development & Leadership
*2013 participant

Supervisor of Authorization Center
AA in Healthcare Administration; pursuing BS in Healthcare Management
*2014 participant
Classroom Training Sessions

• Concepts of Leadership
• Interpersonal Skills
• Leading Change Initiatives
• Coaching & Mentoring
• Professional Development
• A Different Path
Continued Program Elements

Independent Leadership Development
- AOLCP Book Club & Discussion Facilitation
- Leadership Classes offered by Organizational Learning & Development
- Career Goals & Résumé Building

Networking/Personal Development
- Personal Reflections
- "My Journey"
- Shadowing
- Mentorship
- Mock Interviews
What’s New?

• Tailoring the curriculum to the participant base
  • Supervisors need advanced skills**
  • Front-line Employees need basic skills
  • Giving more rather than less

• Change Initiative project that will run the course of the entire program

• More dedicated focus on employee engagement, presentation skills and ACTION

• Focus areas identified through application and interview process shared with mentors to help guide the relationship
What’s the feedback so far?
Questions?