

## About Froedtert Hospital Department of Perioperative Services

An integral part of the operations of one of the most respected healthcare organizations in the Midwest, Froedtert Hospital's Department of Perioperative Services encompasses a clinical staff of nearly 500 employees. With Froedtert Hospital's continued expansion in collaboration with the Medical College of Wisconsin, the team manages over 19,000 surgical cases annually. Froedtert Hospital opened a new integrated surgical and interventional area in June 2017 bringing the total number of operating rooms in the facility to thirty-one.

## The Challenge

As a regional healthcare leader and expanding Academic Medical Center, Froedtert Hospital's surgical services area has experienced sustained growth in volume and diversity of cases. Under these circumstances, the scheduling and productivity of staff became especially critical. The management of Froedtert's expanding team remained a paper-based process that had several inherent flaws:

- While a central resource created the schedule, it was created merely to be posted and wasn't updated, archived, or saved. Once posted, the staff made changes to the paper copy of the schedule by simply crossing out or whiting out previous assignments and over-writing them. There were no formal processes for managing change requests, nor did it fully accommodate organizational rules and policies governing workforce management.
- This scheduling approach meant that staff members did not fully understand or appreciate the impact of organizational policies around time management and therefore did not strictly adhere to them, including paid time-off (PTO) and on-call policies. For example, the management of time cards was not standardized occasionally leading to erroneous and inflated on-call pay.
- Scheduling challenges also impacted overtime expense. Managers often offered double-time (not time-and-a-half) to cover difficult shifts because there was no fair and balanced way to staff those shifts.
- These challenges meant the charge nurses had limited trust, understandably, in the schedule and therefore often over-staffed to accommodate the variability they anticipated.
- The lack of transparency and reliance on non-standard processes created considerable dissatisfaction and frustration for the staff. In a competitive market, this increased controllable attrition and made retention of talented staff members more difficult.

## The Solution: Developing Scheduling Discipline

Froedtert Hospital's Perioperative Leadership team headed by Allan Gray and Mary Haines recognized the implications of these challenges and set out on a disciplined and deliberate course to address them. The organization hired a scheduling specialist, Lauren Kiekhaefer, and empowered her to make the changes she deemed necessary to bring resource management under control and ultimately optimize it. Under Lauren's leadership, the team identified four areas to address: Centralization, Communication, Consistency, and Clarity. They systematically went about addressing these areas both through revised processes and the implementation of enabling systems and technologies to drive greater staff satisfaction and financial and operational improvement. Their best practices included:

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*"In the end, the staff knows that we are balancing their best interest with what's right for the organization. They know I have their back and that I will be straightforward with them. There is no guesswork on their part – everyone knows what to expect when it comes to the schedule."*

*- Lauren Kiekhaefer  
Scheduling Specialist, Perioperative Services*

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### Centralization:

- Lauren immediately started managing both schedule creation and schedule changes centrally. She did not allow any changes to the schedule to occur without her intervention (eliminating the paper-based process). She also implemented a centralized time-off request process.
- Though unpopular at first, Lauren enforced all organizational policies and procedures centrally as well. She accepted full responsibility for the schedule even though that meant saying “no” a lot and managing many difficult conversations with her colleagues.
- As she gained control of the schedule, Lauren and team implemented OpenTempo’s automated scheduling solution as the “source of truth” for assignments. The system also enabled staff to make requests and swap assignments much more easily but within the rules established by the organization.

### Consistency:

- Lauren enforced organizational policies uniformly and without exception. She worked with all the other managers to clarify existing rules and reinforce the need to apply them. They even spent time re-wording policies to close loopholes and tried thinking of ways to get around their own rules to tighten them. Over time, the staff came to respect Lauren’s approach especially as they learned the policies themselves. For example, employees did not understand that if they worked more than 80 hours in a two-week period their PTO would be reduced by that amount. With consistent enforcement and communication (see below) this ceased to be an issue.
- The team used the scheduling technology to codify these rules and apply them automatically to any requests made in the system. This ultimately cut down request processing time to around 2 minutes.

### Results

As Lauren and the team implemented these changes, the progress was painful at first. They realized the cultural barriers they had to overcome, but their “4 C’s” approach helped them push through the issues associated with change management. By starting in a disciplined and consistent way, the team can now allow more flexibility to accommodate the clinical staff’s special circumstances as the exception not as the rule. Ultimately, the department runs much more efficiently and has absorbed volume growth, including opening a new surgical and interventional area, without incurring incremental premium labor expense. More specifically, the organization has managed a 15% increase in surgical cases with no additional overtime and, most importantly, no negative impact on quality. Staff satisfaction has improved meaning attrition has decreased reducing recruitment costs. Where scheduling was a burden for their organization, the hard work by Lauren and team has made scheduling and resource management a competitive advantage.

### Communication:

- The team worked together with Lauren to continually reinforce the need to tighten up the schedule process not only to improve patient care but also to help the staff members themselves. Lauren reinforced this messaging continually.
- Lauren deliberately explained her decisions around assignments to her teammates and took extra time to listen to their concerns and issues. She remained consistent, but also communicated clearly with knowledge of the policies as the backdrop.
- The team spent time teaching staff members how to manage their time effectively. With the scheduling system in place, Lauren enabled the team to process requests via their mobile devices and could even give them visual cues to know if their requests for PTO, for example, were likely to be approved.

### Clarity:

- The team made every effort to make the schedule and all assignments completely transparent. The staff no longer had to guess about who was working when – especially the charge nurses. Lauren communicated any changes clearly and kept audits and archives of all requests, decisions, and alterations.
- Technology helped Lauren improve transparency still further. For example, connectivity to Froedtert’s Epic EHR meant staff members could see data about the cases they are assigned to work the next day including the type of case, the timing, and the other care team members involved. This information is available to them on their mobile device so they can plan ahead.