Follow these 9 steps to lead change as a chief wellness officer

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While it may be tempting as a newly-appointed chief wellness officer (CWO) to jump in and start changing things within your organization quickly, that’s not the best approach.

As organizations create new C-level executive positions to systemically improve well-being among physicians and other health professionals, it is best for CWOs to take the time to define the scope they are responsible for.

They should also define the current state of the organization, as well as what the future state should look like, Tait D. Shanafelt, MD, co-author of an AMA STEPS Forward™ toolkit that offers a road map for CWOs, said in an interview with co-author Christine Sinsky, MD, the AMA’s vice president of professional satisfaction. Dr. Shanafelt is an associate dean of the Stanford School of Medicine in California and chief wellness officer at Stanford Medicine.

The toolkit “Chief Wellness Officer Road Map” outlines a nine-step approach CWOs can follow to implement a leadership strategy for professional well-being:

**Clearly define your scope and charge.** Health care CWOs are not "personal resilience" officers. Instead, they spend most of their time focused on creating a more efficient and supportive practice environment through workflow redesign and strengthening dimensions in organizational culture such as leadership, teamwork, professionalism, collegiality and community.

**Study and understand your organization.** Before a CWO can get started on implementing and tracking new initiatives, they must become well-versed in the organization’s gaps and needs. This will likely involve gathering new data.

**Build your team.** The team should include administrative or operational leaders, administrative assistants, project managers, statistics and methodology experts, event planners, and communications experts.
Identify existing organizational programs, gaps, and resources. Meet with other relevant organizational leaders—the chief quality officer (CQO), chief medical officer (CMO) and others—to understand their efforts so you can ensure yours are complementary and integrated with other efforts.

Define and develop your team's mission and strategy. Once your team is in place, meet to clearly define and develop your team's mission—envision an ideal future state—and a strategy to achieve it.

Establish partnerships, distributed leadership, and thematic task forces. Partnerships with the CQO, CMO and other leaders throughout the organization are key to being an effective CWO. Thematic, time-limited task forces can also help the organization make progress on specific issues spanning multiple organizational silos or departments.

Develop a bidirectional communication strategy. It's important to keep physicians informed about what is being done to support their professional well-being. Communicating that can happen through newsletters, emails, brief video report-outs, or guest presentations at department meetings.

Set performance metrics for the organization and the team. There are distinctions between organizational metrics and metrics for the CWO’s team. CWOs can’t be held responsible for organizational metrics such as overall burnout scores, but should be responsible for providing education, advocacy and leadership, and a strategy to guide the organization.

Avoid common pitfalls and mistakes. This includes everything from trying to oversee too many initiatives to becoming the complaint department.

### Defining a strategy is key

Failing to develop a strategy is a big pitfall that new CWOs face. Instead, following the road map outlined in the toolkit helps you define the very specific and limited number of initiatives that are going to help your organization.

“There are so many things that could be done—many of which are worthwhile—but you will not be able to do them all,” Dr. Shanafelt said. “The strategy really helps you hone down on the critical few that you have prioritized as the most important needs for the organization now.”

Learn more about how to lay the groundwork at your organization with the “Establishing a Chief Wellness Officer Position” toolkit.

AMA?STEPS Forward open-access toolkits offer innovative strategies that allow physicians and their staff to thrive in the new health care environment. These courses can help you prevent physician burnout, create the organizational foundation for joy in medicine and improve practice efficiency.


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