6 ways chief wellness officers can gain insight to an organization

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Amid a culture that is contributing to burnout and a loss of a sense of joy in medicine, a chief wellness officer (CWO) can help an organization systematically improve the well-being of physicians and other health professionals.

It is important that a new CWO studies and understands the organization before jumping in to make changes. An AMA STEPS Forward® toolkit helps organizations do just that and more. The “Chief Wellness Officer Road Map” toolkit outlines a nine-step approach CWOs can follow to implement an organizational strategy for professional well-being. The second step in the toolkit is studying and understanding the organization.

“It is important to have a clear understanding of your organizational structure and the scope of your responsibilities at the outset: Who are the professionals within your realm of responsibility? What data on well-being has already been acquired?” explained Christine Sinsky, MD, vice president of professional satisfaction at the AMA, who co-wrote the toolkit.

Dr. Sinsky said it is also important to understand the well-being related work already underway by leaders in other departments at your organization—for example, human resources, information technology and faculty development.

“This will allow you and your team to compliment those efforts, without unnecessary duplication and without causing unintended friction,” she said.

Getting the lay of the land

As a CWO gets started on understanding the organization, the toolkit recommends focusing on these six fundamental areas:
- Organizational structures. Consider the size, geographic distribution, number of sites and leadership hierarchy.
- The organization’s relationship to its physician workforce. Look at whether there is direct employment, an open staff model, an affiliated network, or a combination of these models. Also look at the reporting structure of who oversees these individuals.
- Key priorities of the executive leadership team. These can typically be found in the organization’s strategic plan and may include things such as expanding access, improving quality, market expansion, evolving toward new payment models, pursuing contracts with local employers or preparing for value-based payments.
- The organization’s current financial health.
- Reputational strengths and risks.
- External landscape and the competitiveness of the practice environment in which the organization functions.

How to capture the best data

Once the CWO understands the broad organizational factors, it is crucial to collect quantitative data. Even if the organization already measures professional engagement, that is not enough. To get a holistic picture, the organization should evaluate the positive and negative aspects of the environment.

Typically, an assessment involves an institutionwide survey that physicians and other professionals in the CWO’s scope participate in. The surveys should holistically evaluate dimensions of professional fulfillment and occupational distress. They should also use standardized and validated instruments that have national benchmarks. The toolkit offers several examples of surveys, such as AMA Professional Burnout and Satisfaction Survey (the Mini-Z).

Talk with people

With survey data in hand, use the information to catalyze conversations throughout the organization. For example, the toolkit suggests a “listening tour.” This can include sharing the results of the survey with different work units, getting feedback on whether the results accurately reflect people’s experiences and asking for input on what would be the biggest system-wide and local opportunities for improvement.

CWOs can also ask about positive experiences on the listening tour. The “appreciative inquiry” framework is one way to go about that, which includes asking participants to verbally share with the group—or write on a card that is collected—two or three aspects of their work that are going well and
two or three things that are the most frustrating.

During this phase, it’s important for CWOs to let people know they are in a data-gathering part of the process and that the information will help prioritize which issues will be addressed. CWOs also should be careful to not set an expectation that they and other leaders will fix every concern raised in the sessions.

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.