Engaging Physicians from Day One
Integrating New Physicians into Organizational Culture

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New Physician Starts Approaching a Critical Mass

Modeling Growth in New Physician Ranks

Potential Percentage of Employed Physicians With Less Than Three Years of Tenure

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>23.9%</td>
</tr>
<tr>
<td>2011</td>
<td>33.5%</td>
</tr>
<tr>
<td>2012</td>
<td>42.0%</td>
</tr>
<tr>
<td>2013</td>
<td>48.4%</td>
</tr>
</tbody>
</table>

Model Assumptions¹

- Overall Physician Turnover Rate: 9%
- Turnover Rate Among Physicians With Less Than 3 Years of Tenure: 12%
- Growth Goal for Employed Physician Group in 3 Years: 50%


¹ Initial number of employed physicians does not affect final percentages.
Integration Challenges Extend Beyond Just Finances

Lack of Hospital Experience Likely to Create Additional Roadblocks

Key Barriers to Cultural Integration of New Physicians

- **Formerly Independent Physician**
  - Pre-existing, engrained perceptions of hospital, culture

- **Closer affiliation primarily motivated by desire for financial stability**

- **Limited experience operating in large, team-based culture**

- **Entrepreneurial, business perspective**

- **Physician From Hospital Setting or Recent Graduate**
  - Isolated, siloed from organization

- **Time in high demand, competing priorities**

- **Resistant to change**

Source: HR Investment Center interviews and analysis.
First Year Offers Best Chance for Cultural Integration

Physician Engagement Levels Highest During Early Tenure

Percentage of Physicians Engaged by Tenure

<table>
<thead>
<tr>
<th>Tenure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 Year</td>
<td>43%</td>
</tr>
<tr>
<td>1 - 5 Years</td>
<td>35%</td>
</tr>
<tr>
<td>5 - 10 Years</td>
<td>35%</td>
</tr>
</tbody>
</table>

Physicians early in tenure naturally more engaged; offers opportunity to start with higher baseline engagement

1. Based on the Advisory Board 2017 physician engagement benchmark.
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Source: Advisory Board Survey Solutions, Physician Engagement Initiative, 2017; HR Investment Center interviews and analysis.
Integrating New Physicians Into Organizational Culture

Source: HR Investment Center interviews and analysis.

Infusing a Cultural Focus in Physician Onboarding

1. Physician-Tailored Onboarding

Identifying Culturally Compatible Physician Partners

2. Physician Self-Screening

3. Cultural-Fit Assessment
Physician Onboarding an Obvious Missed Opportunity

Contrary to All-Staff, Culture Rarely a Focus for Physicians

Representative All-Staff Onboarding by Time Allocation

Organizational Culture: 20% - 30%

Representative Physician Orientation Topics by Time Allocation

Clinical Leadership
Clinical Protocols
Referral Channels
Practice Mechanics
Compensation and Benefits
Billing and Credentialing
Providing a Detailed Road Map for Physician Onboarding

**HR Investment Center**
**Physician Onboarding Toolkit**

**7 Key Considerations for Physician Onboarding**

<table>
<thead>
<tr>
<th>Consideration</th>
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<tbody>
<tr>
<td>#1 Use Existing All-Staff Orientation as a Foundation</td>
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<td>#7 Employ Physician-Specific Survey to Further Refine Efforts</td>
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</table>

For complete Physician Onboarding Toolkit, please see the Appendix.

Source: HR Investment Center interviews and analysis.
Use Existing All-Staff Orientation as a Foundation

Organizations Re-Tool Schedule to Best Accommodate Physicians

### Representative Orientation Schedule

<table>
<thead>
<tr>
<th>Mission, Vision, Values</th>
<th>Personal Development</th>
<th>Infection Control, Case Management</th>
<th>Customer Compact</th>
<th>HIPAA Primer</th>
<th>General Operations</th>
</tr>
</thead>
</table>

**Most relevant physician sessions spread throughout day, difficult for physicians to attend**

### Orientation Schedule Following Restructuring

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<th>Mission, Vision, Values</th>
<th>Customer Compact</th>
<th>General Operations</th>
<th>Personal Development</th>
<th>Infection Control, Case Management</th>
<th>HIPAA Primer</th>
</tr>
</thead>
</table>

**Schedule restructured to better accommodate physician schedules**

![Diagram]

**Source:** HR Investment Center interviews and analysis.
Leverage Executives as Organizational Ambassadors

Northern Michigan Executives Welcome Every New Physician

### Overview of New Physician Executive Breakfast

**Meeting Agenda**

One-hour breakfast attended by all new physicians starting that month; goal to establish rapport with hospital leadership

**Executive Participants**

Breakfast attended by CEO, COO, CFO, VPMA, VPHR

**Standing Appointment**

Meeting a standing appointment on executives’ calendars, cancelled if no new physicians start that month

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**Case in Brief: Northern Michigan Hospital**

- 200-bed hospital located in Petoskey, Michigan; employs 80 physicians
- Monthly executive breakfast held with all new physician hires; focus of discussion how to better acclimate physicians into organization
- Executives’ calendars held for meeting a year in advance

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Source: Northern Michigan Hospital, Petoskey, MI; HR Investment Center interviews and analysis.
Consideration #3

Emphasize Pragmatic Peer Advice

Mercy Offers Physician Vantage Point to Assimilation Process

Overview of “What I Wish I Would Have Known” Panel

Panel Members

Four physicians who began working at hospital in previous two years

Participants

Any new physician starting since previous session, typically quarterly

Representative Areas of Focus

- What is unique about working at Mercy
- How to integrate self and family into community
- How to efficiently set up an office practice
- How to assimilate into Mercy’s culture
- How to navigate the community

Case in Brief: Mercy Health Partners—Southwest Ohio

- 1,897-bed, five-hospital system based in Cincinnati, Ohio; employs 160 physicians
- New physicians attend “What I Wish I Would Had Known” panel hosted by more tenured physicians; session focuses on Mercy-specific nuances, lasts one hour
- Panel coordinated by CMO; CEO or COO gives welcoming comments

Source: Mercy Health Partners, Cincinnati, OH; HR Investment Center interviews and analysis.
Implement Meaningful Physician Leader Check-Ins

Affinity Medical Group President Highly Visible in Critical First Year

Key Goals of President Check-Ins

- Solicit feedback on how physician is integrating
- Engage in dialogue on physician performance, expectations
- Develop improvement next steps, as necessary

Check-In Timeline

30 Days 60 Days 90 Days 1 Year

For New Physician Check-In Guide, please see the Appendix.

Case in Brief: Affinity Health

- 393-bed, three-hospital system based in Menasha, Wisconsin; employs 250 physicians
- President of medical group holds four informal check-ins with each new physician hire across first year; each session approximately 30-45 minutes
- Goal of sessions to gauge integration, discuss next steps
Consideration #5
Optimize Impact of Mentor Pairings

Handful of Pairing Criteria Critical to Success

Physician-Specific Pairing Recommendations

<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Capsule Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cross-Practice Pairings</td>
<td>New physician, assigned mentor should practice at different sites; this encourages more candid questions, conversations</td>
</tr>
<tr>
<td>Business Acumen</td>
<td>Depending on practice setting, new physician may benefit from mentor with business acumen; if so, should be top consideration in pairing decision</td>
</tr>
<tr>
<td>Whole-Practice Mentor</td>
<td>If acquiring practice already established in community, each physician unlikely to need dedicated mentor; instead, designate single mentor point person to work with practice as a group</td>
</tr>
</tbody>
</table>

For Physician Mentor Criteria and Road Map of Mentor Duties, please see the Appendix.

Source: HR Investment Center interviews and analysis.
## Ensure Acclimation of Spouse and Family

**Physician Engagement Depends on Content Family-Life**

### Proven Spouse and Family Integration Tactics

<table>
<thead>
<tr>
<th>Tactic</th>
<th>Organization</th>
<th>Description</th>
<th>Further Implementation Details</th>
</tr>
</thead>
</table>
| **Spousal Pre-Screen**          | Geisinger Medical Center 548-bed hospital located in Danville, Pennsylvania | Spouses of incoming physicians interviewed before physician start date, typically by phone; goal to proactively identify acclimation issues to address, types of support family will need | Critical areas of focus for discussion include:  
• Professional interests  
• Children’s needs, interests  
• Qualms about relocating |
| **Dedicated Spousal Support Liaison** | Geisinger Medical Center 548-bed hospital located in Danville, Pennsylvania | Each incoming spouse assigned member of volunteer Spousal Recruitment Committee; serves as go-to person on community questions | Pairing considerations include age, career, interests, proximity, children |
| **Realtor Cadre**               | Affinity Health 393-bed, three-hospital system located in Menasha, Wisconsin | Organization utilizes handful of local realtors to provide physician, family community tour; each realtor screened in advance as effective ambassador, assigned to specific physicians based on common interests | Realtor supplied physician resume ahead of time |
Consideration #7

Employ Survey to Further Refine Efforts

Physician-Specific Tool Gauges Opportunities for Improvement

**Provider Onboarding Survey**

<table>
<thead>
<tr>
<th>Implementation Tip</th>
<th>Capsule Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limited number of questions</td>
<td>Survey only 12 questions; kept brief to decrease survey fatigue, increase response rate</td>
</tr>
<tr>
<td>Mix of physician-specific, general items</td>
<td>Items include credentialing, medical leadership, effectiveness of start packet, recruitment process</td>
</tr>
</tbody>
</table>

**Case in Brief: Overlake Hospital Medical Center**

- 337-bed hospital located in Bellevue, Washington; employs 67 physicians
- In early 2011, Training and Development created post-onboarding survey specifically targeted to new physicians; since implementing, physician response rate 60%
- Survey focuses on mix of general orientation issues, physician-specific items

Source: Overlake Hospital Medical Center, Bellevue, WA; HR Investment Center interviews and analysis.
## Physician Onboarding Toolkit

### Physician Onboarding Steps and Accompanying Tools

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Accompanying Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Use Existing All-Staff Orientation as a Foundation</td>
<td></td>
</tr>
<tr>
<td>#2 Leverage Executive as Organizational Ambassador</td>
<td>• Executive-New Physician Group Discussion Guide</td>
</tr>
<tr>
<td>#3 Emphasize Pragmatic Peer Advice</td>
<td>• Sample Peer Lessons Learned Panel Overview</td>
</tr>
<tr>
<td>#4 Implement Meaningful Physician-Leader Check-Ins</td>
<td>• New Physician Check-In Guide</td>
</tr>
<tr>
<td>#5 Optimize Impact of Mentor Pairings</td>
<td>• Guidelines for Physician Mentor Role</td>
</tr>
<tr>
<td></td>
<td>• Sample Mentorship Program Process Overview</td>
</tr>
<tr>
<td>#6 Ensure Acclimation of Spouse and Family</td>
<td>• Sample Spousal Support Program Overview</td>
</tr>
<tr>
<td>#7 Employ Physician-Specific Survey to Further Refine Efforts</td>
<td>• Post-Onboarding Survey Tip Sheet</td>
</tr>
<tr>
<td></td>
<td>• Sample Post-Onboarding Physician Survey</td>
</tr>
</tbody>
</table>

For complete set of physician onboarding tools, please see the Appendix.

Source: HR Investment Center interviews and analysis.
Integrating Physicians into Organizational Culture

Infusing a Cultural Focus in Physician Onboarding

1. Physician-Tailored Onboarding

Identifying Culturally Compatible Physician Partners

2. Physician Self-Screening
3. Cultural-Fit Assessment

Source: HR Investment Center interviews and analysis.
Filtering for Ideal Physician Partners

Key Filters for Physician Candidates

All Candidates
- Provides high-quality patient care

High Performing
- Expands access, increases capacity
- Brings needed specialty service to community

Strategically Important
- Collaborates with hospital, other physicians
- Shares organizational vision

Culturally Compatible

Source: HR Investment Center interviews and analysis.
Equipping Physician Candidates to Self-Screen for Fit

Geisinger Communicates Pertinent Details Throughout Recruitment

Case in Brief: Geisinger Medical Center

- 548-bed hospital located in Danville, Pennsylvania
- Physician candidates given detailed information on organization, culture at multiple recruitment steps; goal for incompatible physicians to self-select out of process before offer extended
- Efforts began in 2000 due to high turnover; since implementation, turnover reduced from 10% to just 3%
Providing a Realistic Picture of Day-to-Day Expectations

### Key Topics Addressed During Upfront Expectation Setting

<table>
<thead>
<tr>
<th></th>
<th>Key Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Organizational Values</td>
</tr>
<tr>
<td>2</td>
<td>Patient-Care Philosophy</td>
</tr>
<tr>
<td>3</td>
<td>Community</td>
</tr>
<tr>
<td>4</td>
<td>Committee Responsibility</td>
</tr>
<tr>
<td>5</td>
<td>Patient Load</td>
</tr>
<tr>
<td>6</td>
<td>Productivity Goals</td>
</tr>
</tbody>
</table>

### Recommended Documents to Share With Physician Candidates

- Organizational Values Statement
- Sample Goal Sheet
- Profile of Practice

Geisinger began efforts to improve screening process; took several years to fully develop

Practice #3: Cultural-Fit Assessment

Screening Candidates for Cultural Fit

ThedaCare Utilizes Physician-Specific Behavioral-Based Interviewing

Key Screening Components

- **Standard Screens**
  Education and practice history, reference checks

- **Personality/Leadership Assessments**
  OD specialists administer 16-Personality Factors, Human Synergistic Lifestyles Inventory, MBTI

- **Behavioral-Based Interviewing**
  Senior Medical Director, COO, OD, and practice providers conduct behavioral-based interview to assess cultural fit

**Case in Brief: ThedaCare**

- 362-bed, five-hospital system based in Appleton, Wisconsin; employs approximately 200 physicians
- Behavioral-based interviews added to physician screening process in 2008 to better judge potential organizational fit
- Findings used to tailor integration, development efforts of hired physicians

Source: ThedaCare, Appleton, WI; HR Investment Center interviews and analysis.
Mining for Core Attributes of Model Physician Partners

Physician-Specific BBI Guide

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Sample Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborative Nature</td>
<td>Tell me about a time you placed another physician's needs over your own. How did you feel about it?</td>
</tr>
<tr>
<td>Communication Effectiveness</td>
<td>What is the most recent difficult conversation you’ve had with a colleague?</td>
</tr>
<tr>
<td>Flexibility</td>
<td>How did you react the last time you were in an unsettled or rapidly changing environment?</td>
</tr>
<tr>
<td>Fiscal Responsibility</td>
<td>What is your philosophy for controlling healthcare costs?</td>
</tr>
<tr>
<td>Leadership</td>
<td>Tell me about the most important contributions you’ve made to your current organization. Why did you do it?</td>
</tr>
<tr>
<td>Patient–Centeredness</td>
<td>How did you resolve the last major conflict you had with a patient?</td>
</tr>
<tr>
<td>Clinical Excellence</td>
<td>How do you feel about sharing data and best practices?</td>
</tr>
</tbody>
</table>

For complete version of the Physician-Specific BBI Guide, please see the Appendix.

Source: ThedaCare, Appleton, WI; HR Investment Center interviews and analysis.
Utilizing the Most Qualified Judge of Each Attribute

Leaders Own Discrete Lines of Questioning Based on Expertise

Representative Areas of Inquiry by Leader

CMO or Medical Director
- Clinical Excellence
- Patient-Centeredness

COO or Administrative VP
- Fiscal Responsibility
- Collaborative Nature
- Communication Effectiveness

Organizational Development Manager
- Leadership
- Flexibility

Source: ThedaCare, Appleton, WI; HR Investment Center interviews and analysis.
Translating Candidate Responses Into Hiring Decisions

Distinguishing Improvement Opportunities From Deal Breakers

Two Possible Applications of BBI Results

**Identify Development Opportunities**

- BBI Assessment Results
- Development Plan

Hospital extends offer, leverages information from interview to proactively customize individual development plan and hasten cultural fit

**Recognize Red Flags**

- Candidate Application

Hospital does not extend offer, alarmed by evidence of weaknesses historically difficult to rectify:
  - Extreme introversion
  - Resistance to change
  - Defensiveness
  - Aversion to transparency

Source: HR Investment Center interviews and analysis
Expanding the Principle Beyond Individual Practitioners

Fairview Deploys Cultural Screen to Assess Practices as a Whole

Assessing Physicians for Cultural Compatibility

Possible to assess cultural fit of individual physicians...

Assessing Physician Practices for Cultural Compatibility

....however, cannot pick and choose among physicians when acquiring practice; assessing compatibility of practice requires distinct approach, tool

Case in Brief: Fairview Health Services

• 1,647-bed, multi-hospital system located in Minneapolis, Minnesota; employs 750 physicians
• Developed Change Assessment Tool to diagnose cultural similarities, differences with potential practice acquisitions
• Overall findings determine level of resources afforded for transition, cultural integration

Source: Fairview Health Services, Minneapolis, MN; HR Investment Center interviews and analysis.
Isolating Critical Cultural Indicators for Acquisition

Change Assessment Tool

Key Cultural Indicators

1. Business Strategy
2. Mission, Vision, Values
3. Human Resource Philosophy
4. Communication
5. Leadership
6. Achievement
7. Environment
8. Perspective
9. Quality
10. Organizational Structure

For complete version of the Change Assessment Tool, please see the Appendix.
Tailoring Integration Efforts to Assessment Findings

Least Aligned Items Receive Majority of Focus and Resources

<table>
<thead>
<tr>
<th>Change Assessment Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication</strong></td>
</tr>
<tr>
<td>13. Communication style is informal vs. hierarchical</td>
</tr>
<tr>
<td>14. Employee’s suggestions are heard and valued</td>
</tr>
<tr>
<td>15. Communication vehicles are effective (i.e. information can be disseminated rapidly)</td>
</tr>
</tbody>
</table>

Each item assessed on level of consensus between Fairview, practice to be acquired

Fairview leaders also assess importance of items to incoming practice

Majority of integration efforts focused on items with low consensus, high importance; high consensus, high importance items are further emphasized, leveraged to ease transition

Source: Fairview Health Services, Minneapolis, MN; HR Investment Center interviews and analysis.
Questions?

Integrating New Physicians Into Organizational Culture

Infusing a Cultural Focus in Physician Onboarding
1. Physician-Tailored Onboarding

Identifying Culturally Compatible Physician Partners
2. Physician Self-Screening
3. Cultural-Fit Assessment

Source: HR Investment Center interviews and analysis.
Key Executive Takeaways

- **Fix Physician Onboarding** – Given influx of new physicians and harder-to-integrate independents, effective onboarding to organizational culture never more important; wide gulf between what most organizations have in place and what HR could provide.

- **Triage Orientation Sessions** – Equally important to spell out portions of orientation physicians should not attend, otherwise time-constrained physicians likely to opt out of entire program; consider both relevance and quality of sessions.

- **Gather Cultural-Fit Intelligence** – Recruiting process can be used to identify potential challenges in each new physician’s cultural integration; allows organization to tailor onboarding and development to incoming physician’s specific barriers.

- **Lay Groundwork for Selectivity** – Even if organization not yet ready to base physician hiring decisions on cultural compatibility, instituting mechanisms such as BBI now will make eventual transition smoother.

Source: HR Investment Center interviews and analysis.
Webconference Survey

Please take a minute to provide your thoughts on today’s presentation.

Thank You!

*Please note that the survey does not apply to webconferences viewed on demand.*