The three R’s of staff engagement: Relationships, rounding, and recognition

Staff in the OR must be fully engaged each day to ensure they are providing excellent patient care. But finding time to develop that engagement is particularly challenging for OR leaders.

“The OR environment is intense and dynamic, changing minute by minute,” says Amy Bethel, MPA, RN, NE-BC, from UnityPoint Health in Des Moines, Iowa. OR leaders need strategies for staff engagement that fit into their busy schedules and yield results. Two such strategies are employee rounding and recognition, both powerful tools for building relationships and empowering staff.

Why round?
Bethel defines rounding as proactively engaging, listening to, communicating with, building relationships with, and supporting your employees. “The number one purpose of rounding is to establish that personal connection with the employee, which creates trust,” she says.

Jane McLeod, MSN, RN, cofounder of Capstone Leadership Solutions, Inc, in Sault Ste Marie, Michigan, agrees: “Any article on how to engage employees will tell you that you need to develop a personal relationship with your staff members so you know what makes them tick and what motivates them at work.”

Rounding can be particularly helpful for communicating with staff who are not very verbal. “You can capture feedback from those individuals who typically fly under that radar,” Bethel says. “Sometimes your most valuable feedback comes from those people who choose, for whatever reason, not to speak up.” For instance, a nurse might feel intimidated by other staff or is by nature reluctant to speak in a group.

And rounding provides an opportunity to reinforce positive behavior through recognition.

Rounding can be categorized into three tiers: executive leaders rounding on employees, leaders at the manager level rounding on employees, and leaders at all levels rounding on patients. This article focuses on establishing a program for leaders to round on employees.

Set expectations
A successful rounding program depends on engaging the entire leadership team. “Otherwise, it will be very difficult to meet your goal,” Bethel says. At UnityPoint, leaders are expected to round on 90% of their employees each quarter. The organization has established a process for rounding so it is done consistently (sidebar).

Bethel emphasized that rounding has to be scheduled and purposeful. “Rounding is not management by walking about. People need to know the questions you are going to ask and when you plan to ask them,” she says.
UnityPoint uses the following questions:
• What’s working well?
• Is there an individual, group, or department that I can recognize for doing exceptional work?
• Are there any systems that need improvement?
• Do you have the tools and equipment you need to do your job?

Leaders also add a fifth question, which varies depending on the current environment, for example, asking about a newly implemented electronic health record system.

“Round with heart and purpose, so they know it’s not just a task for you,” McLeod says. “Draw them out.”

Before McLeod rounds, she asks herself, “What am I going to learn about this person that I don’t already know?” Encouraging her staff to share something about themselves has deepened her relationship with them and identified common interests like a love of cooking.

UnityPoint leaders use iRound, an app developed by The Advisory Board Company, a global research, technology, and consulting firm headquartered in Washington, DC, to remind themselves what they spoke about last time with the employee and to capture key points of the conversation. Bethel notes that it’s important to be comfortable with saying, “I don’t know,” and then following up.

Bethel says leaders need to know that not all staff may embrace rounding; some will view it with skepticism. In this case, she says, “The most important thing is to be prepared and make sure your follow-up is meticulous.” Leaders must also be prepared to answer tough questions directly, honestly, and compassionately.

Recognize staff
One of the most powerful benefits of rounding is identifying employees who deserve recognition. “You can get so caught up in the whirlwind of operations that you don’t think to recognize someone unless it’s a ‘wow’ moment,” McLeod says. “It’s easy to overlook the little stuff, but that’s important as well.”

Tools for recognizing staff include thank you notes, annual awards, department celebrations, and direct recognition from colleagues and patients. The key is to be specific.

“If I just say, ‘you were awesome with that patient,’ you feel pretty good but you don’t know what you did well, so you’re not going to go out of your way to repeat that behavior,” McLeod says. However, if the leader gives specifics, such as, “you saw that the patient was anxious about his wife who was sick at home, and you took the time to call her so you could update the patient before he went to surgery,” the feedback reinforces the behavior. “What gets recognized and celebrated gets repeated,” McLeod notes.

The handwritten thank you note is a particularly simple, yet effective, tool (sidebar). “A written thank you note shows the person took time, and it reinforces the desired behavior,” Bethel says. She and McLeod recommend sending notes to the employees’ homes so they can share them with family members. “I’ve had some notes for years that were sent to my home,” Bethel says.

McLeod says leaders sometimes hesitate to send thank you notes because they worry staff won’t believe they are sincere. “You have to do it with heart,” she says. “You have to put your own personality into it.”

She buys thank you notes with funny pictures and in her signature color of orange. “Go crazy with the card itself,” she says. “Inside write the key behavior that you want to recognize and therefore have repeated.”

Rounding process
Below is a summary of a purposeful rounding process.
1. Let employees know when you will be rounding, and share rounding questions ahead of time. The purpose is to ensure they have what they need to do their jobs well.
2. Start the conversation by making a personal connection with the employee. For example, ask about his or her family.
3. Ask the rounding questions (UnityPoint asks five questions). Drill down to obtain specific information.
4. Record issues on a rounding log.
5. Recognize and reward those who are identified by peers.
6. Establish a standing agenda item to report on rounding outcomes at staff meetings.
7. Post reports in the department.
8. Share the rounding log and report with your manager.
9. Repeat quarterly.

Source: UnityPoint. Used with permission.
As with any feedback, Bethel says to be specific in what you write. “Outline the who, what, when, and where.”

McLeod says that some organizations she works with use a recognition toolkit created by its employee experience team. It might include thank you notes, coupons for a discount in the cafeteria, a free movie pass, or a ticket to be entered into a drawing for a small prize. The toolkits help give leaders ideas for how to recognize employees.

Create a recognition program
Organizations may choose to create a more formal systemwide recognition program, but McLeod cautions that the decision to recognize should not be taken on by a committee. Instead, leaders—and employees—should be empowered to recognize without approval from a higher authority.

These overall programs should be accompanied by a rollout that explains the purpose and parameters. “Be clear that the intention of the program is to give recognition for behaving, performing, and contributing at a higher level and not just for working hard,” McLeod says. Otherwise, staff may simply reward each other for a challenging shift.

It’s also helpful to tie the program to standards and to have a catch phrase. McLeod says Southwest Health Center in Platteville, Wisconsin, uses the phrase “The Drive” to reflect the hospital’s drive on their journey to excellence. Employees who greatly exceed expectations receive a small toy car (called “Driven”) and a coupon to use in the cafeteria. In some organizations, the person is recognized in the hospital newsletter or entered into a monthly drawing.

Costs for such programs are relatively low—as little as $5,000 a year.

Follow-up
Lack of follow-up after rounding will quickly lead to staff disengagement and
even resentment, but follow-up of process improvements increases employee satisfaction.

“You need to make sure staff understand that you have heard them and that you have taken them seriously,” Bethel says.

Leaders should document the conversations on rounding logs and address common issues. To facilitate this process, UnityPoint uses “stoplight reports.” The report below is communicated back to those in the department and may be shared with the leader’s immediate supervisor. Rounding logs are reviewed monthly with the leader’s supervisor.

At the end of the year, quarterly reports are summarized so leaders can talk about the successes over the year. “Staff sometimes forget that there has been follow-up,” Bethel says. The annual report serves as a reminder.

**Overcome barriers**

The tendency to focus on negative events is one barrier leaders must surmount when building relationships. “We in healthcare tend to look at things negatively because we’re constantly trying to figure out what’s wrong with the patient,” McLeod says.

She suggests leaders take time every day to reflect and write down three good things that happened during the day, so they start looking for positivity, and to set a goal of writing one thank you note a week. “You have to train your brain to think positively.” Once leaders focus on the positive, it’s easier for them to recognize it in others.

McLeod recommends creating an environment where positive feedback significantly outweighs negative, so that it becomes more prevalent in the workplace.

Perhaps the biggest barrier is time. “The most important thing is to have a plan; that’s what will make it successful,” Bethel says. For example, a leader might plan to round from 1 to 3 PM on Fridays. She acknowledges that sometimes plans can go awry in the OR but adds, “People have been successful in doing it.”

Fortunately, the time spent building a strong relationship with staff can, in turn, save leaders time. “When you recognize staff behaving, performing, and contributing at a higher level, you’re empowering them to repeat what they did,” McLeod says. “Leaders will find they have less on their plate because their staff will be coming to them wanting to take on other projects.”

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