THE ACADEMY H2C Strategic Survey – Q2 2017
Tracking: Physician Alignment

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Key Findings

- Combatting physician burnout has become a top priority for Leading Health Systems, with 50% of health systems ranking the priority level as a 4 or 5 on a scale of 1 (Very Low) to 5 (Very High), compared to other health system priorities.

- A majority (60%) of responding health systems measure burnout among their employed and/or affiliated physicians, commonly through physician engagement surveys.

- Over half (60%) of responding health systems have implemented programs at the system level to prevent physician burnout.

Workload, Change Fatigue, and Burnout are Top Challenges around Clinician Engagement

As healthcare continues to grow and evolve at a rapid pace, physician workload continues to increase, and practice becomes more complex, health systems are struggling to keep physicians enthused and engaged in their work.

“The biggest challenge is that with us growing so rapidly and healthcare changing so rapidly there are a lot of competing priorities. The biggest issue is how to engage physicians on the key priorities without immersing them on every priority. So many quality things to engage them on – hard to keep pace with it.” (CSO)

Additional challenges appear around time management, poor work/life balance, leadership development, EHR inefficiencies and frustrations, alignment of interests, and a need for increased access and standardization, many of which lead to increased physician burnout.

Combating Physician Burnout is a High Priority

With the many challenges around physician engagement at Leading Health Systems, combatting physician burnout has become a top priority with 50% of health systems ranking the priority level as a 4 or 5 on a scale of 1 (Very Low) to 5 (Very High), compared to other health system priorities (Figure 1). Many executives reported that combatting physician burnout has become a higher priority in the last year, and is likely to continue to increase in priority level.

“We are looking at this very seriously. We are looking at it for everybody, not just physicians.” (CMO)

Figure 1. Compared to other priorities at your health system, how much of a priority is combatting physician burnout?

<table>
<thead>
<tr>
<th>Priority Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (Very Low)</td>
<td>10%</td>
</tr>
<tr>
<td>2</td>
<td>10%</td>
</tr>
<tr>
<td>3</td>
<td>30%</td>
</tr>
<tr>
<td>4</td>
<td>45%</td>
</tr>
<tr>
<td>5 (Very High)</td>
<td>10%</td>
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</table>
60% of Health Systems Survey Physicians Around Engagement, Burnout

Reflective of the high priority level of combatting physician burnout, a majority (60%) of responding health systems measure burnout among their employed and/or affiliated physicians (Figure 2). Health systems commonly utilize a formal physician engagement survey to measure burnout. While most health systems utilize their own physician engagement survey, some report using a third party survey (e.g., AMA, Press Ganey) to allow for national benchmarking.

“We administer an annual engagement survey to all of our physicians, including voluntary. The survey does address burnout (e.g., ‘I feel burned out’, ‘I feel more callous over time’).” (COO)

Most health systems that do not currently measure burnout among their physicians (40%) commonly reported that the issue of burnout is a top concern and many are developing metrics in order to begin measuring.

Health Systems Have Implemented Various Programs to Prevent Burnout

A majority (60%) of responding health systems have implemented programs at the system level to prevent physician burnout including providing educational and support materials to physicians, physician wellness programs, implementing town halls allowing physicians to voice concerns, social programs, speaker series, and physician counseling and mentoring programs, among others.

“We have a bimonthly education/social program that brings in outside speakers to address a wide range of issues generally about things related to the practice of medicine. We are also trying to achieve more effective and efficient workflows within physician practices to make physicians' lives simpler and allow them to have better work/life balance.” (CSO)

As workload, EHRs, and time management are common factors leading to physician burnout, health systems are highly focused on streamlining workflows and making the physician workload lighter through automation, utilizing medical scribes or APPs, and EHR improvement.

“We are looking to manage physician workload by using robotics and machine intelligence to scrub through things like emails and answer them automatically. We are also working on workflow issues by consolidating work in one location among people who are specialized in that area so patients get routed to the center of excellence and physicians don’t have to deal with the one-offs.” (CFO)

Many of the health systems that have not implemented any programs around physician burnout are in the process of discussing and developing future programs.
Health Systems are Working to Improve EHR Usability to Reduce Burnout

As frustration around Electronic Health Records (EHRs) is one of the top factors leading to physician burnout, health systems are implementing a variety of strategies to enhance EHR usability for clinicians including customization to improve workflow integration (95%), implementing standardized order sets/use cases (90%), reducing/refining the number of alerts (75%), improving interoperability across the health system (75%), and using medical scribes/APPs to delegate workload (70%), among others (Figure 3).

“We have looked at the root cause of burnout and found 80% of the time it comes down to the EMR. We implemented scribes for any doctor who wants them which has helped. One thing we’ve noticed with the EMR is physicians are spending numerous hours going through their inbox. We are in the process of rolling out a program where nurses handle the inbox.” (CMO)

Other strategies health systems are utilizing include improving access to clinical decision support tools, implementing voice recognition technology, creating a concierge team for training and support, and improving clinical continuity across the system.

Most Health Systems’ Clinician Retention Rates Have Remained Steady

Among responding health systems, a majority (65%) have not seen a shift in their clinician retention rate in the last year (Figure 4).

Although most health systems are not losing clinicians at a faster rate, most (82%) health systems have still implemented strategies to improve their clinician retention rate. Strategies include enhancing the onboarding process, EMR optimization, implementing formal programs around burnout, offering training and development programs, renovating compensation models, increased flexibility around scheduling and staffing, as well as implementing programs to improve communication and coordination.

“We’ve completely renovated our physician compensation model to include a performance mentoring/evaluation piece designed to force conversations between physicians and who they report to. We are also in the midst of developing a physician leadership program and we are working with HR around initiatives that will enhance clinical wellbeing/resilience.” (CMO)

Figure 3. Is your health system implementing strategies to enhance EHR usability for clinicians? (Please check all that apply.)

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Percent of Health Systems</th>
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<tbody>
<tr>
<td>Customization to improve workflow integration</td>
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<td>Using medical scribes/APPs to delegate workload</td>
<td>70%</td>
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Figure 4. Has your organization experienced a change in your clinician retention rate in the last year?

- Increased: 15%
- Stayed the Same: 20%
- Decreased: 65%
Profile of Participating Health Systems

Representative of the various regions of the U.S.  

Average Net Patient Revenue

$3.8 BILLION

Own or operate 269 hospitals with 50,019 beds

<table>
<thead>
<tr>
<th></th>
<th>50%</th>
<th>73%</th>
<th>27%</th>
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</thead>
<tbody>
<tr>
<td>Have a Provider-Owned Health Plan</td>
<td>Single-State Systems</td>
<td>Multi-State Systems</td>
<td></td>
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</tbody>
</table>

50%  73%  27%

Methodology

In March and July 2017, The Academy conducted the tenth and eleventh rounds of its quarterly strategic survey among 20 senior health system executives, including: CEOs, COOs, CFOs, CMOs, CNOs, and CSOs. The survey for the interview consisted of: (1) a tracking section that provides insight into trends around primary strategic areas; (2) a special topic area that allows for an in-depth look into a timely, developing issue. Innovation, consumer engagement, ambulatory and real estate strategies, physician alignment, bundling, data analytics, telehealth, pharmacy strategies, and branding were topics of previous surveys.

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