NATIONAL ACADEMY of MEDICINE

CHANGE MAKER IN ACTION SERIES

Data Driven Well-Being: Using Assessments to Advance Meaningful Action

Measuring clinician well-being is an important step toward understanding workforce needs and identifying opportunities for improvement, but measurement alone doesn't create change. Organizations must decide what to measure, select an approach that fits their goals, make sense of what the findings mean, and determine how to act on what they learn. With no single assessment strategy that works for every organization or purpose, navigating this process can be challenging. This resource guide offers practical strategies for designing an assessment approach that fits your organization's needs and using what you learn to drive meaningful action and continuous improvement.

Sign up to be a Change Maker to prioritize health worker well-being at your organization: nam.edu/ChangeMaker

KEY TAKEAWAYS AND STRATEGIES

Build Buy-In and Engage the Right Partners

Building support for assessment efforts requires leadership buy-in and partnerships across the organization. To generate this support, connect your assessment to broader organizational priorities and help leaders see assessment as a tool for addressing their specific challenges and advancing shared goals. When building partnerships, especially with non-clinical partners, demonstrate connections between your intended assessment, well-being, and outcomes such as patient safety, quality, retention, productivity, or financial performance to help make the value of the assessment process clear.

Putting it into Practice

- **Create a clear structure for well-being efforts to help build organizational support**. At **Advocate Health**, *Best Place to Care* provides an established organization-wide framework for well-being efforts, with executive sponsorship, defined workstreams, and dedicated leadership. Establishing the work as an organizational priority, rather than an effort led by an individual, helps bring partners together and build support across the system.
- **Engage leaders at multiple levels**. At **The University of Maryland School of Medicine (UMSOM)**, well-being efforts involve both senior and department-level leadership. The Dean's Office has supported broader efforts to assess and address documentation burden while department chairs engage more closely with clinicians to advance their well-being.

Measure What Matters

An effective assessment begins with clarity about the problem and scope of the question you are trying to understand. From there, organizations should select an assessment approach and measures that fit that purpose and generate credible and relevant information for the stakeholders who will ultimately use the findings. Depending on the specific goal, this may involve assessing the broader workforce experience, evaluating a specific intervention, or combining well-being measures with operational, safety, or other measures.

Putting it into Practice

- **Use complementary assessments to see different parts of the picture while balancing depth with ease of participation and survey burden. Advocate Health** uses several surveys throughout the year to inform their well-being strategy, ranging from a brief, six-question pulse on local support that can be completed in 30 seconds to more comprehensive annual assessments of the work experience and well-being, including their Culture of Safety Work Environment and Well-Being surveys.
- **Look beyond traditional well-being measures**. When evaluating ambient AI documentation, **UMSOM** considered professional well-being alongside documentation burden, productivity, patient interactions, and safety considerations to better understand both the benefits and potential risks of the intervention.

Make Findings Meaningful to Different Audiences

Once findings are available, consider how they will be shared and understood by different audiences. Sharing results, while protecting confidentiality and anonymity, can help build trust and encourage future participation. Tailoring how findings are communicated can help stakeholders understand how the results are applicable to their work. Because frontline clinicians, senior leaders, and other organizational partners may define success differently, the same findings may need to be connected to different priorities and emphasize specific outcomes depending on the audience.

Putting it into Practice

- **Start with what matters to your audience**. Before each high-stakes conversation, **Advocate Health** leaders reflected on what matters to the person on the other side of the table and connected findings to those priorities.
- **Anticipate what different audiences will want to know. UMSOM** designed its assessment to capture outcomes relevant to different stakeholders. For example, clinicians care about work burden and professional well-being while leadership may be more interested in productivity and safety and quality.

> ***"The goal is not simply to measure clinician well-being more accurately…the goal is to use these measurements to redesign the conditions in which clinicians work."***
>
> **IRINA BURD**

> ***"If you've seen one well-being program, you've seen one well-being program."***
>
> **LAURIE HOMMEMA**

> ***"What the frontline cares about is: how is this going to make me a better nurse, physician, housekeeper? How is it going to make me a better mom when I go home?... That's how we [should] talk to them [about data]."***
>
> **KRISTI MCCLURE**

> ***"It's not about raising the scores on a survey, it's about the issues that the scores raise."***
>
> **SHERI ROCCO**

Considering different priorities from the outset helped them make findings useful and relevant to different stakeholders.

Turn Findings into Action and Sustain Engagement

Assessment should serve as the starting point for improvement and action rather than being seen as the end goal. Before determining what action to take, organizations may need to dig deeper into the findings of their assessments and engage frontline staff or others to help understand what results mean in the day-to-day work environment. From there, assigning clear responsibility for action, learning from what works, and communicating back about what was heard and what changed can help turn assessment into a continuous cycle of learning and improvement.

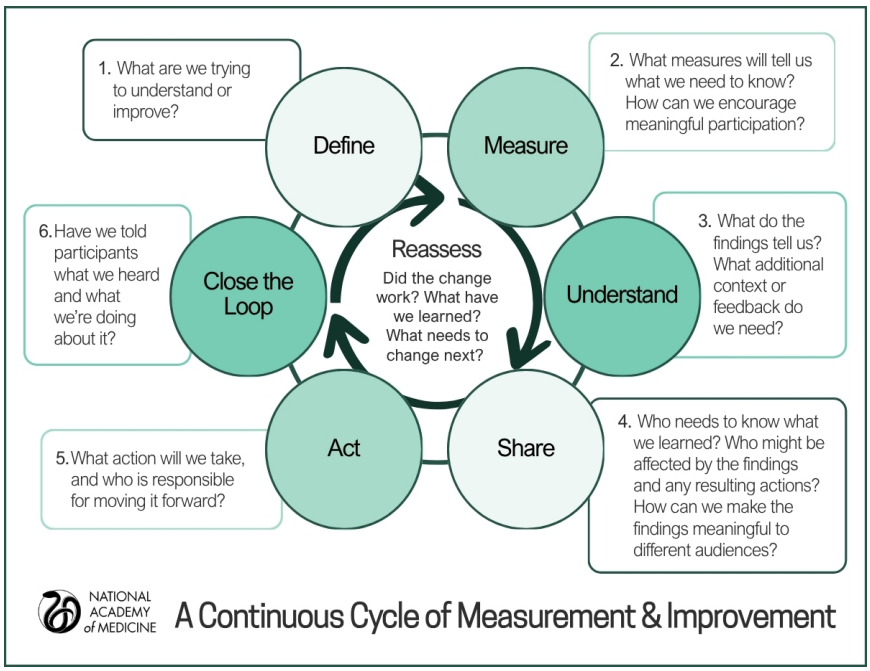
Putting it into Practice

- **Follow up with those who provided input**. At **Advocate Health**, leaders share action plans with frontline staff, seek additional feedback, revise plans as needed, and communicate back about what was heard and what was done in response.
- **Use findings to guide organizational decisions. UMSOM** used findings from its ambient AI pilot to inform their decision to move from a limited experiment to broader institutional access to the technology.

FROM MEASUREMENT TO MEANINGFUL ACTION

Measurement should not be an endpoint, and turning assessment findings into meaningful action is an ongoing process. The seven steps below form a continuous cycle for understanding findings, acting on what is learned, and using new information to guide continued improvement.

Define: What are we trying to understand or improve?
Measure: What measures will tell us what we need to know? How can we encourage meaningful participation?
Understand: What do the findings tell us? What additional context or feedback do we need?
Share: Who needs to know what we learned? Who might be affected by the findings and any resulting actions? How can we make the findings meaningful to different audiences?
Act: What action will we take, and who is responsible for moving it forward?
Close the Loop: Have we told participants what we heard and what we're doing about it?
Reassess: Did the change work? What have we learned? What needs to change next?



The Process in Practice

This process can be adapted for different assessment purposes, such as understanding the broader workforce experience or evaluating a targeted intervention.

The examples below show how Advocate Health and UMSOM have applied these steps.

Advocate Health: Understanding Workforce Experience

- **Define**: Advocate Health seeks to understand the workforce experience across a large health system spanning six states.
- **Measure**: The organization gathers input from employees throughout the year, using a brief survey administered during each employee's hiring anniversary month to provide an ongoing pulse on local support, alongside annual assessments of the broader work experience and well-being.
- **Understand**: Service line leaders review findings and engage frontline staff through focus sessions when additional context is needed.
- **Share**: Anonymized results are shared through customized reports for clinician leaders and a centralized repository that provides broad access to findings. Leaders also have direct portal access to explore more granular data relevant to their areas.
- **Act**: Service line leaders develop action plans based on the findings, and promising and innovative ideas, referred to as "gold nuggets," are identified and spread across the organization.
- **Close the Loop**: Action plans are shared across service lines and with frontline staff. Additional feedback is gathered, plans are revised as needed, and any changes are communicated back to staff.
- **Reassess**: Continue collecting data through recurring assessments and use new findings and feedback to inform continuous improvement.

UMSOM: Evaluating a Targeted Intervention

- **Define**: Determine whether ambient AI documentation reduces documentation burden and improves clinicians' experience at work.
- **Measure**: Assess documentation burden alongside speed of note completion, after-hours charting, work-related stress, professional well-being, sustainability, attention to patients, quality of patient interactions, and concerns about accuracy.
- **Understand**: Examine the findings across well-being, operations, patient-facing, and safety considerations to understand the benefits and potential risks of the intervention.
- **Share**: Share findings with institutional leadership to inform decision-making.
- **Act**: Use findings from a pilot primarily involving physicians, along with some advanced practice provider (APPs), to inform a transition from a limited pilot to broader institutional access to ambient AI documentation for physicians, APPs, fellows, and senior residents.
- **Close the Loop**: Communicate expanded access through an organization-wide email from the Dean's Office, sharing an announcement about discounted departmental rates for ambient AI per provider.
- **Reassess**: Assess the impact of ambient AI documentation with new providers following one year of use.

Disclaimer: *The external resources on this page do not necessarily represent the views of any one organization, the Clinician Well-Being Collaborative, or the National Academies of Sciences, Engineering, and Medicine, and have not been subjected to the review procedures of, nor are they a product of, the National Academies. We are sharing this curated list based on the expert guidance of Collaborative members to serve as resources.*

ABOUT THE CHANGE MAKER IN ACTION SERIES

The National Academy of Medicine's (NAM) Change Maker in Action Series is designed to foster dynamic information-sharing and collaboration, highlight the impact of ongoing initiatives, and elevate effective solutions to shared challenges. Each webinar focuses on a specific topic relevant to the NAM Change Maker community, promoting ongoing efforts to embed well-being as a long-term value. Through this series, the NAM aims to inspire continued progress and drive the national movement to support the well-being of the health workforce.

Learn more at nam.edu/ChangeMaker.

WEBINAR SPEAKERS:

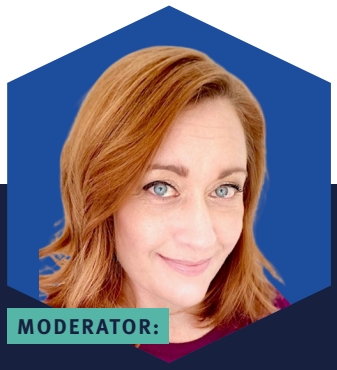
MODERATOR:

Laurie AM Hommema, MD

Senior Medical Director, Well-Being and Associate Program Director, Riverside Family Medicine Residency

OhioHealth

The OhioHealth Wellbeing center provides mental health services, counseling, same-day support, mindfulness programming and group/team interventions to all of OhioHealth and community partners. OhioHealth's We Care Program is designed to mitigate the inherent stress of working in health care through critical incident response, peer support, dog therapy, REACH © Suicide Prevention Gatekeeper Training, and more.



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Irina Burd, MD, PhD

Sylvan Frieman, MD Endowed Professor and Chair of the Department of Obstetrics, Gynecology and Reproductive Sciences

University of Maryland School of Medicine (UMSOM)

UMSOM is a leading academic medical institution dedicated to education, biomedical research, patient care, and community service. It trains physicians, scientists, and health professionals through MD, PhD, and combined-degree programs, and is closely affiliated with major teaching hospitals such as the University of Maryland Medical Center. Known for innovation in areas like trauma care, infectious disease, and transplantation, the institution continues to play a major role in advancing medical science and improving public health locally and globally.

Sheri Rocco, MD, FAAP

Medical Director of Engagement and Illinois and Wisconsin Division Lead, Best Place to Care

Advocate Health

Best Place to Care is Advocate Health's enterprise strategy focused on creating an environment where clinicians and team members can thrive. It is built on the understanding that exceptional patient care begins with a positive, supportive workplace culture. Through this initiative, the Best Place to Care team partners with physicians, advanced practice clinicians, operational leaders, and frontline teams to strengthen clinician voice, improve professional wellbeing, enhance recognition and belonging, and foster a culture where caregivers can deliver their best care.