



International Forum on  
**QUALITY & SAFETY**  
in HEALTHCARE  
COPENHAGEN

# F6: Rest & Recovery for Health Human Resources

## *A Necessary Step for Quality*

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@ck4q



# At your tables, turn to the person next to you ...

Introduce yourselves, answering the question:

***When have I felt most energized at work in the last 12 months?  
What was going on for me?***



2 minutes (1 minute each!)



# Setting the Context

- Health Care Workers (HCWs) have endured waves of COVID-19, and most recently a challenging winter surge
- We face unique professional stressors on top of the uncertainty and fear experienced by the general public
- This has taken a toll on health human resources, with early retirements, job transitions and vacancies all at record highs



Global News





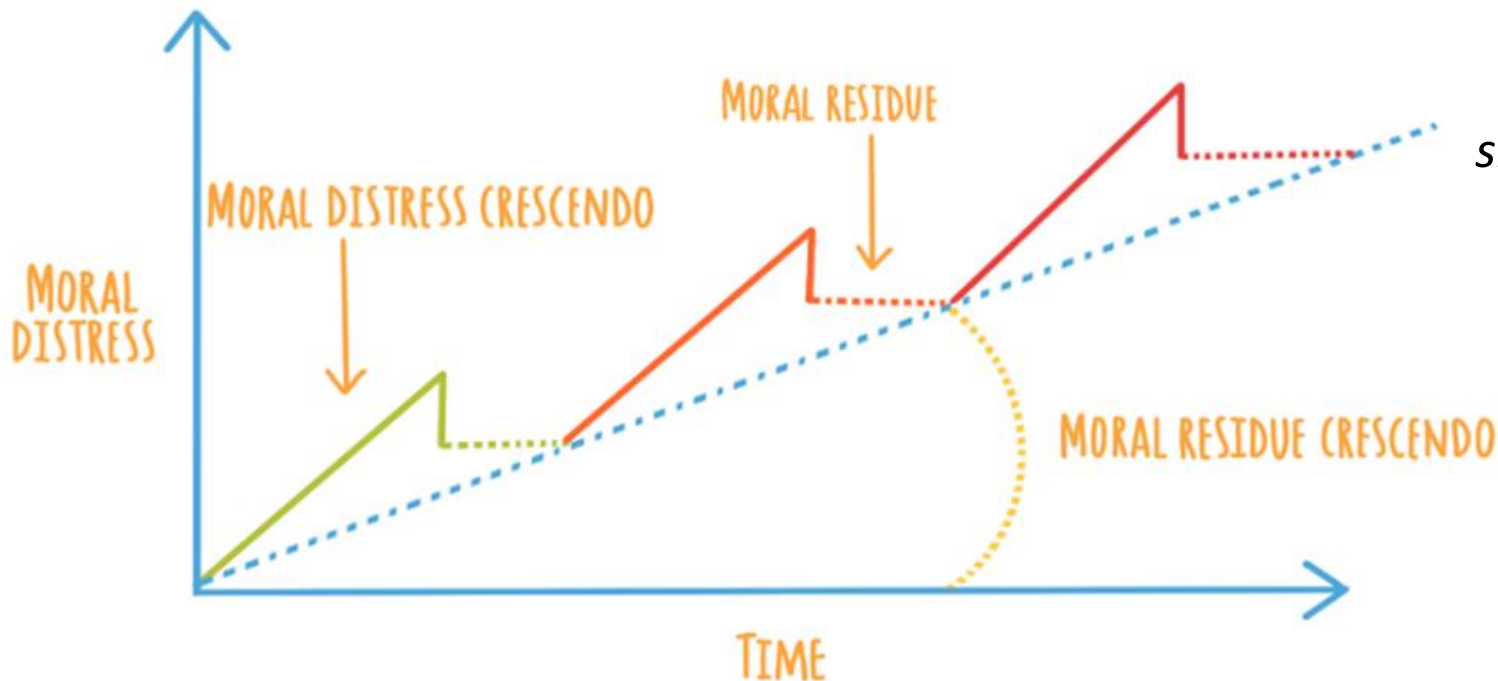
# Setting the Context

*Burnout is a syndrome conceptualized as resulting from chronic workplace stress that has not been successfully managed.*

Three dimensions:

- feelings of energy depletion or exhaustion
- increased mental distance from one's job, or feelings of negativism or cynicism related to one's job
- reduced professional efficacy

# Setting the Context



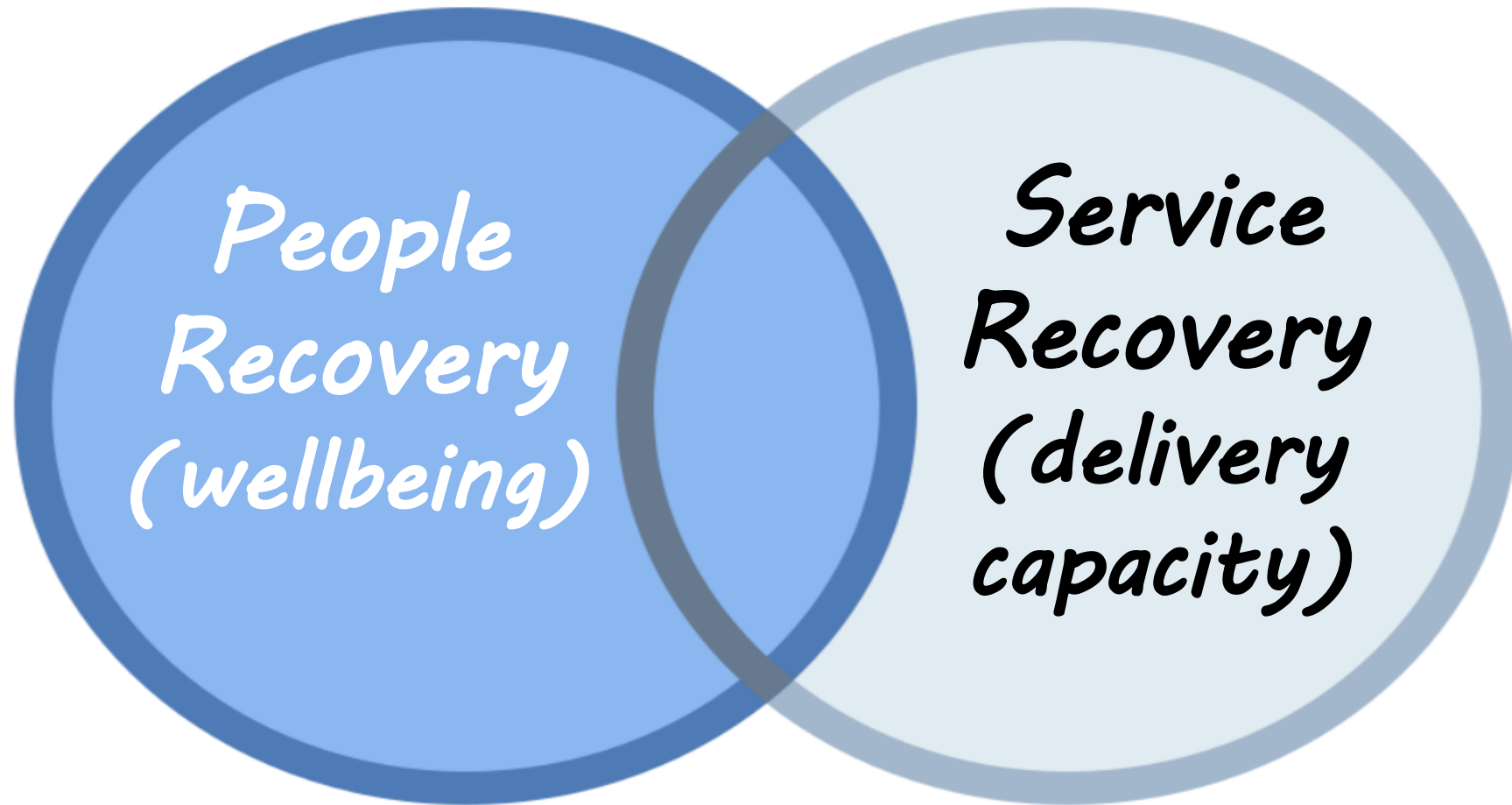
*“Moral distress is a predictable response to situations where nurses recognize that there is a moral problem, have a responsibility to do something about it, but cannot act in a way that preserves their integrity.”*

The residue left from those situations builds up  
Epstein & Hamric, 2009

# #1 Priority = Retention

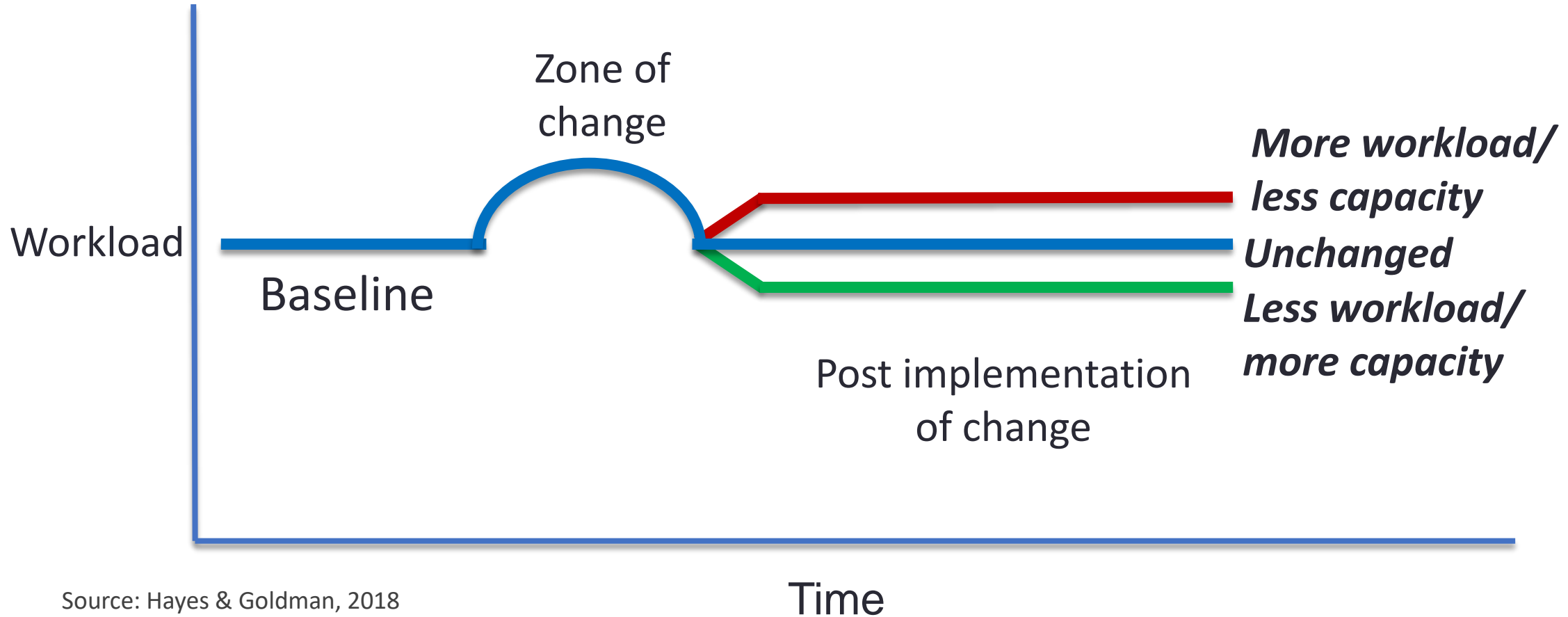


# People recovery AND service recovery



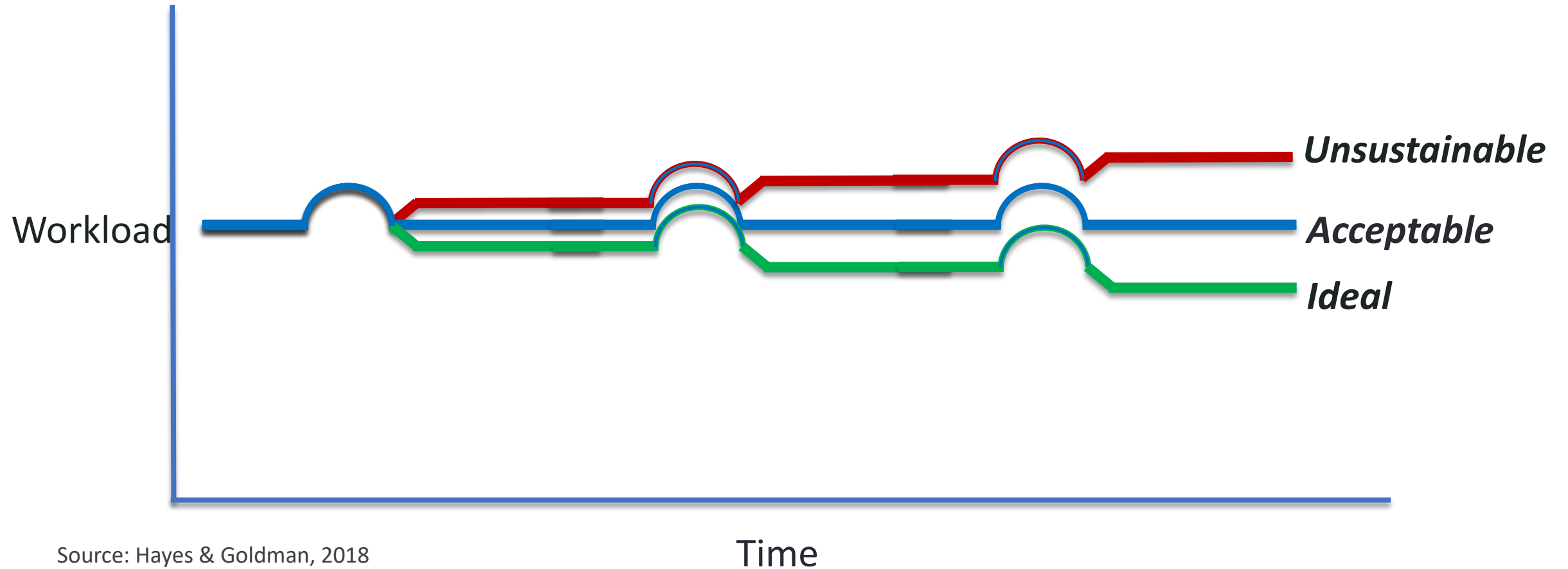


# Impact of Change on Workload/ Capacity

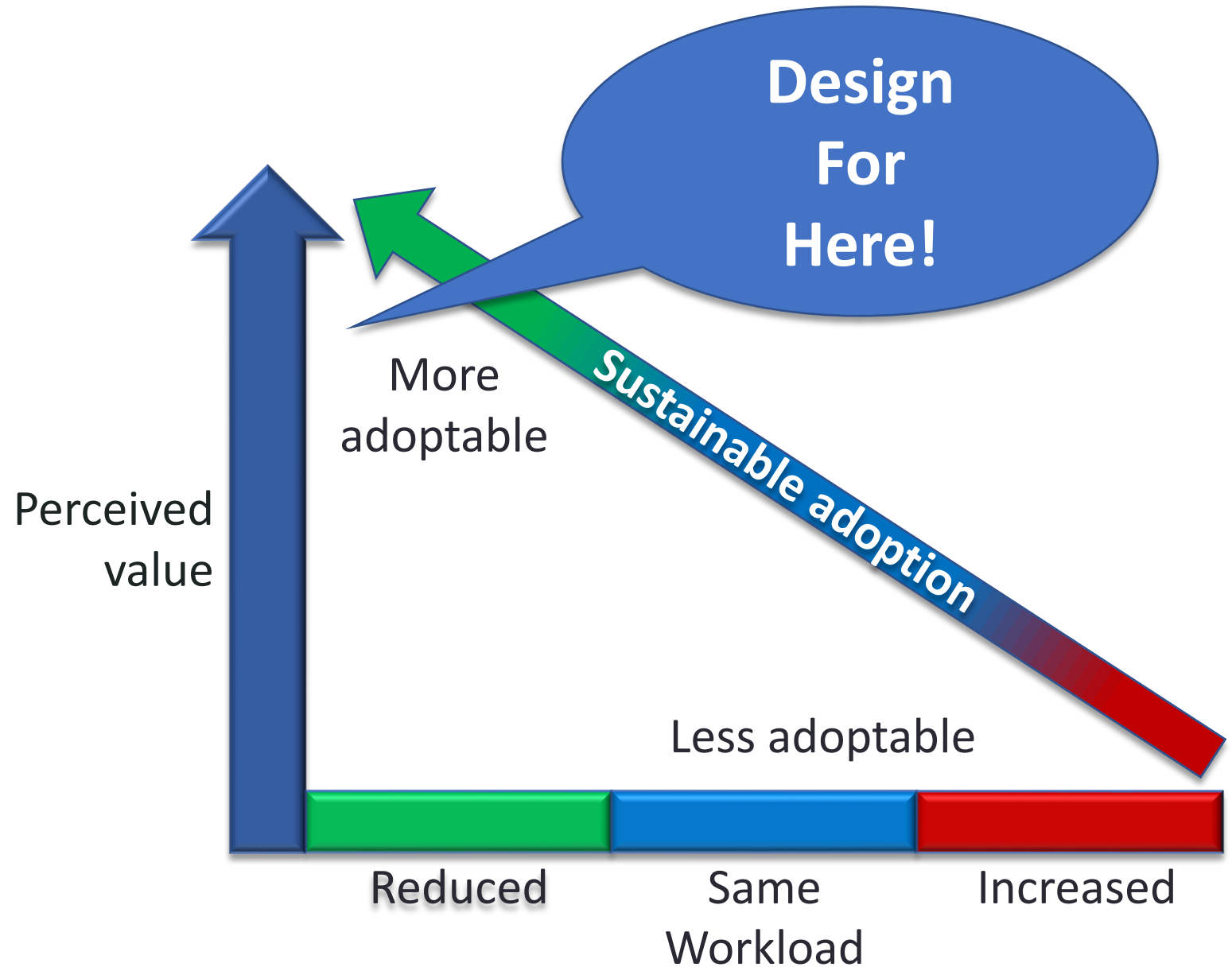


Source: Hayes & Goldman, 2018

# Cumulative impact of change



- › Initiatives that do not add additional workload and have high perceived value are more likely to be adopted, cause less workplace burden and, achieve the intended outcomes



# Energy for change

‘*The capacity and drive of a team, organisation or system to act and make the differences necessary to achieve its goals*

## Building and aligning energy for change

A review of published and grey literature,  
initial concept testing and development

[http://ihpme.webservices.utoronto.ca/Assets/  
IHPME+Digital+Assets/IHPME/hpme/events/b  
evan/bevan-bldg-align-lit-review.pdf](http://ihpme.webservices.utoronto.ca/Assets/IHPME+Digital+Assets/IHPME/hpme/events/bevan/bevan-bldg-align-lit-review.pdf)



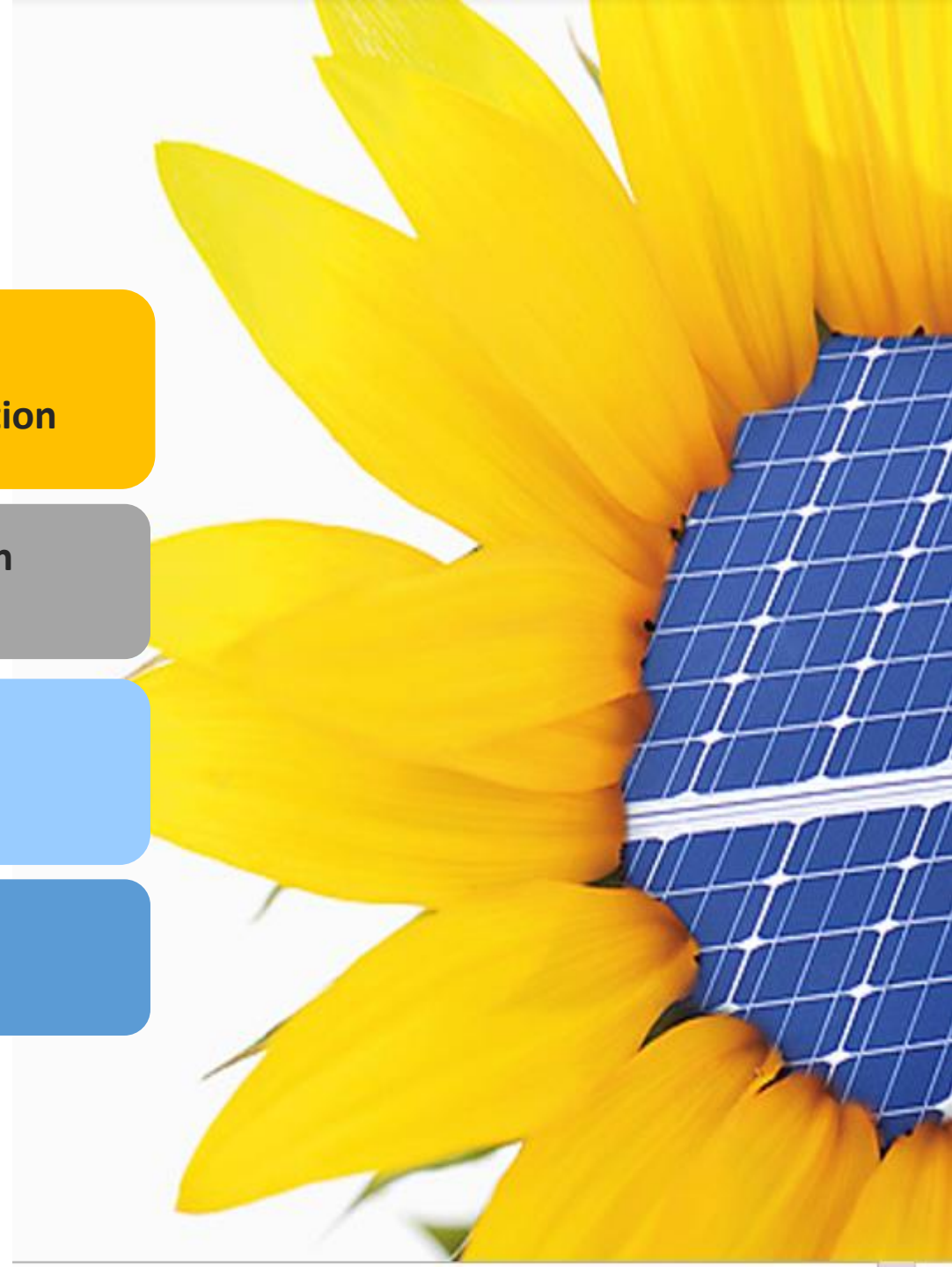
# Organisational energy

**Connection:** how far people see and feel a link between what matters to them and what matters to the organisation

**Content:** how far the actual tasks people do are enjoyable in themselves and challenge them

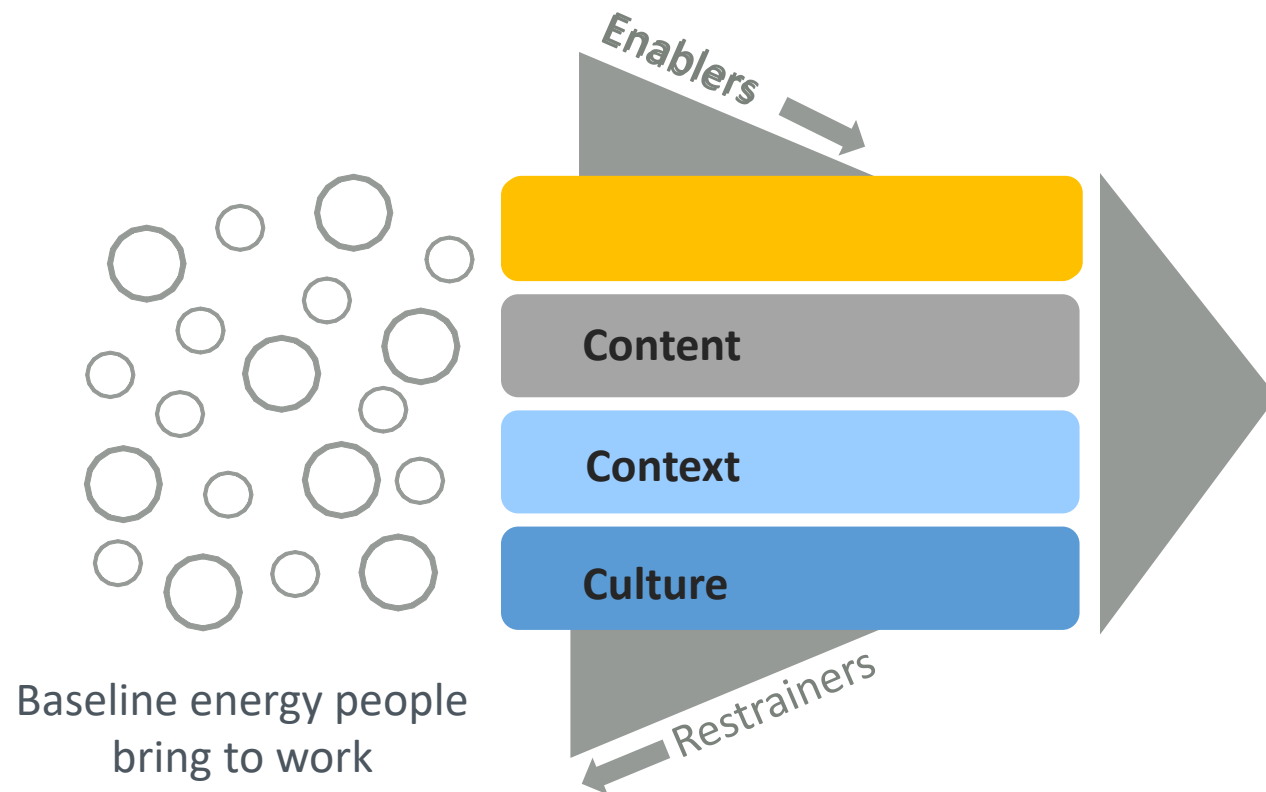
**Context:** how far the way the organisation operates and the physical environment in which people work make them feel supported

**Culture:** how far 'the way we do things round here' encourages people to give of their best



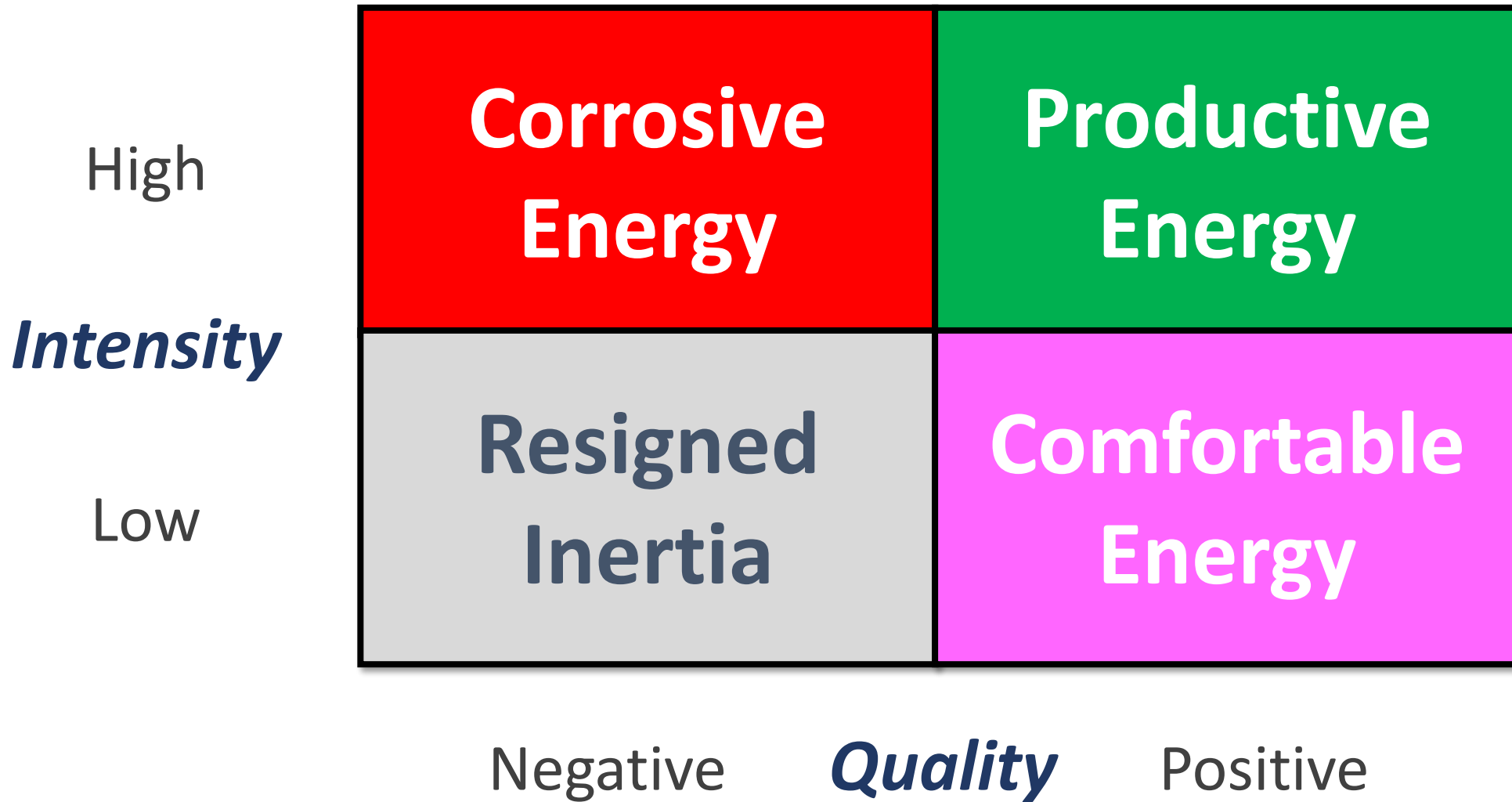


# What are the enabling and restraining factors?



Source: Stanton Marris, 2010

# Energy matrix



# There is a relationship between high energy and high performance

Teams with HIGH productive energy scored higher on:

- overall performance - 14% higher
- productivity – 17%
- efficiency – 14%
- user satisfaction – 6%
- user loyalty – 12%

Research by Bruch and Vogel





# The 5 Energies of High-Performing Teams

## Social

Personal engagement, relationships and connections between people.



## Intellectual

Analysis, planning, thinking.



## Spiritual

Commitment to a common vision for the future, driven by shared values and purpose.



## Physical

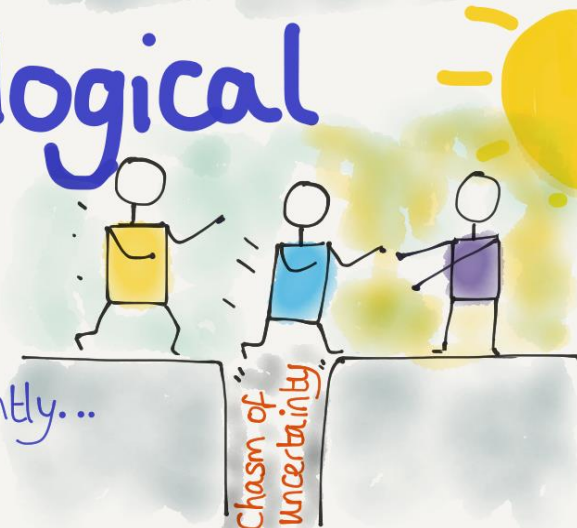
Getting things done!  
Making progress.

@HorizonsNHS



## Psychological

Courage, resilience, feeling safe to do things differently... and take risks.



# Social Energy

*Energy of connection,  
relationships, collective capacity*

It's where people feel a sense of  
*"us and us"*  
rather than  
*"us and them"*

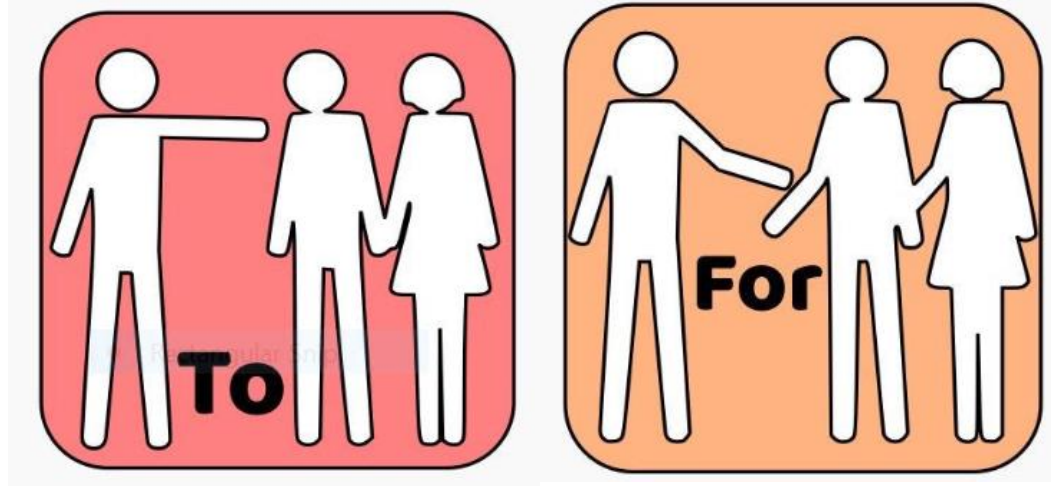




# How we go about change and improvement impacts on energy

## **TO**

When change is  
done to us,  
without us



## **FOR**

*When change is  
done for us,  
without us*



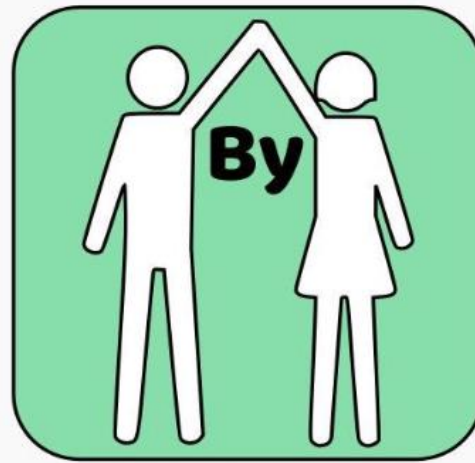
## **WITH**

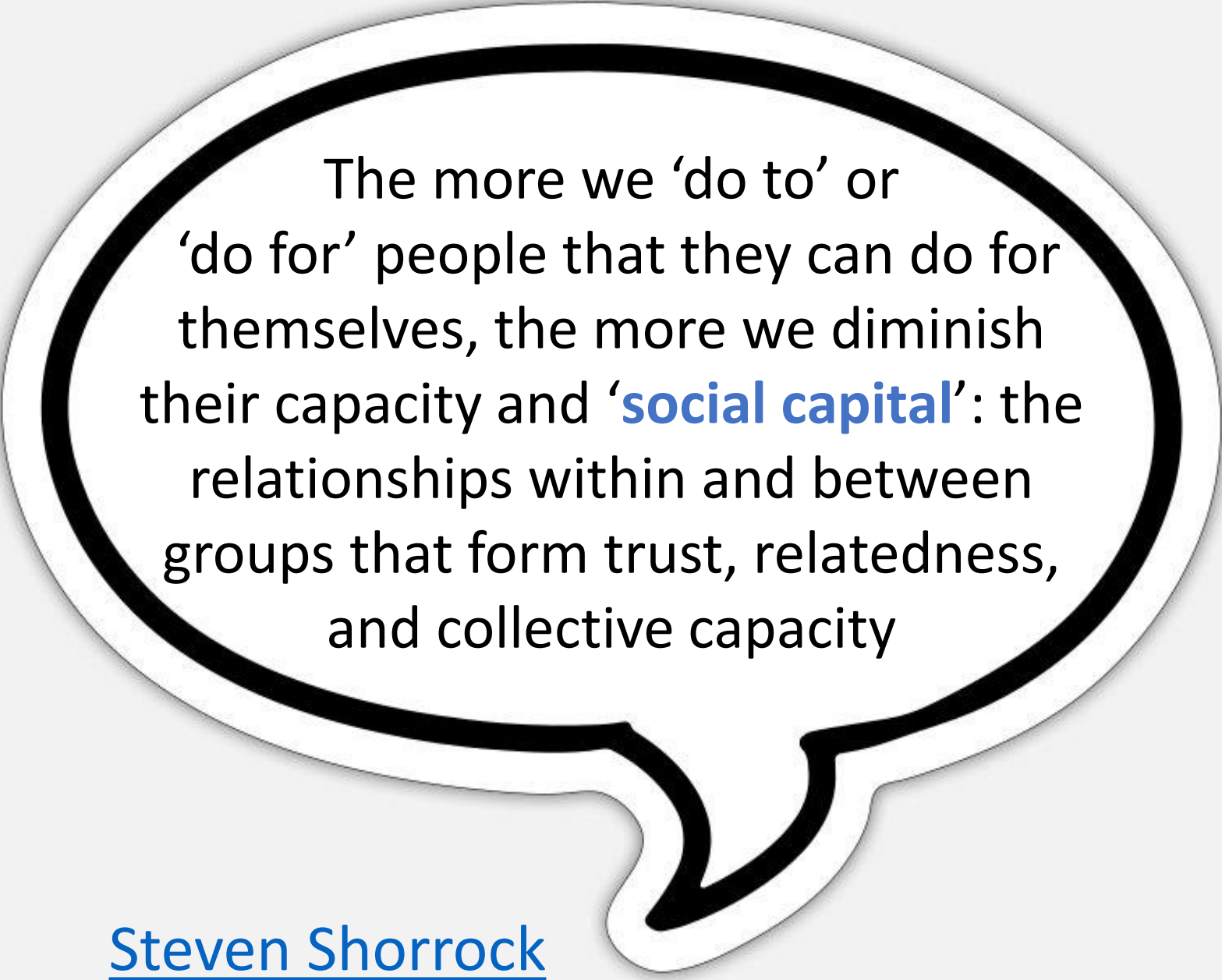
When change is  
done for us, with  
us



## **BY**

When change is  
done by us, for us

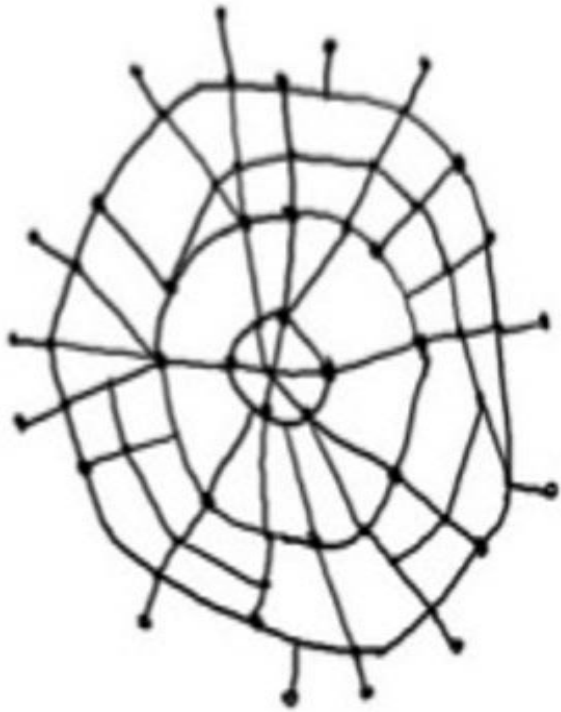




The more we 'do to' or  
'do for' people that they can do for  
themselves, the more we diminish  
their capacity and '**social capital**': the  
relationships within and between  
groups that form trust, relatedness,  
and collective capacity

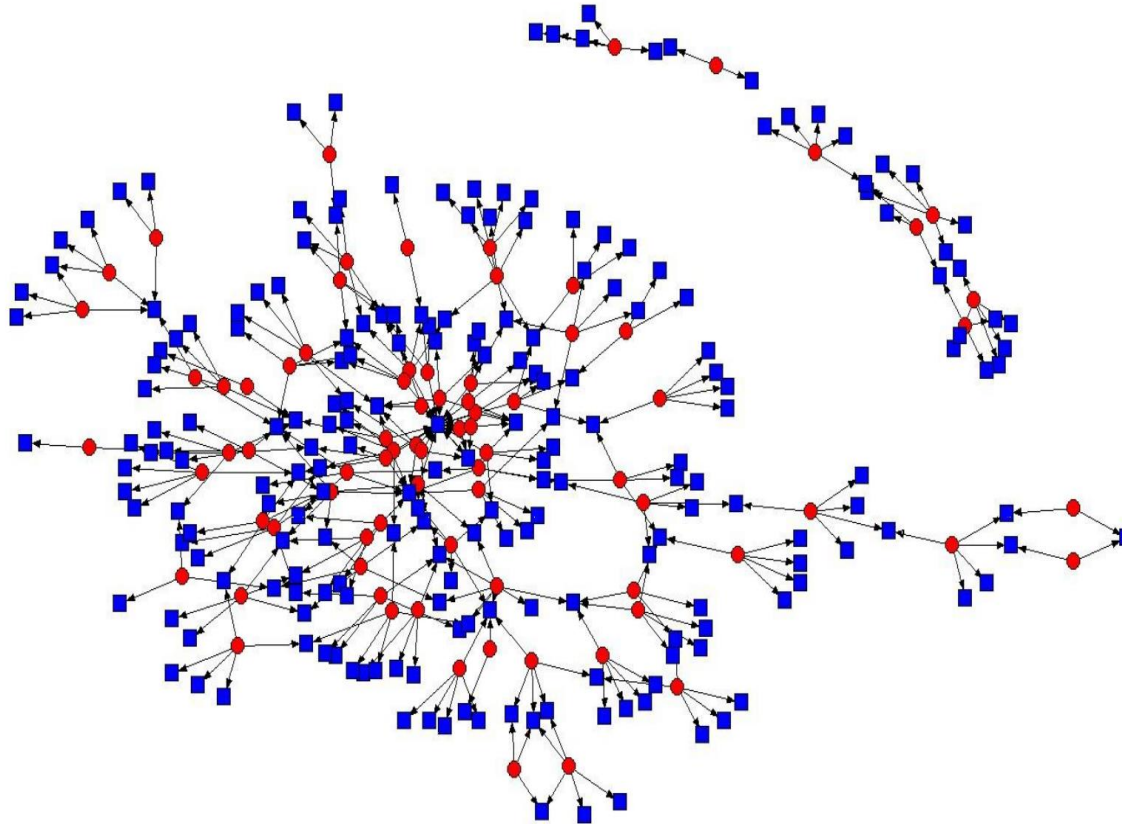
[Steven Shorrock](#)

# Human relationships matter!



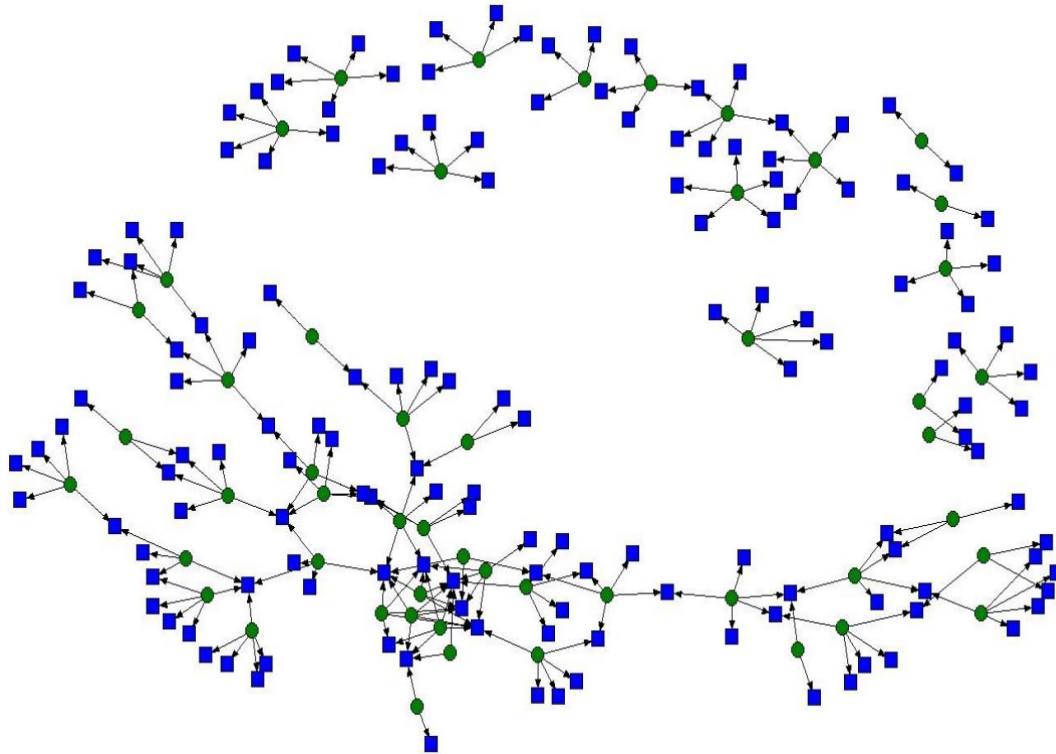
- Evaluation of NHS organisations that undertook comparable improvement initiatives with vastly different outcomes
- The difference? **The level of social connections between those working to lead improvement**

## Organisation A: “Outstanding”



- A distributed network with a high degree of connectivity
- High degree of interaction – everyone is talking to one another
- Dense clusters and groupings also indicate a high degree of collaboration
- High degree of connectivity associated with high capacity to facilitate knowledge exchange and learning

## Organisation D: “Special measures”



- Two thirds of the core network is decentralised and has chain-like characteristics
- Only one small dense cluster
- A third of the network is disconnected with isolated components
- Low to moderate connectivity indicates low capacity to facilitate knowledge exchange and learning



# Spiritual Energy

*Energy of commitment to a common vision for the future, driven by personal and shared values, and a higher purpose*

Gives people the confidence to move towards a different future that is more compelling than the status quo

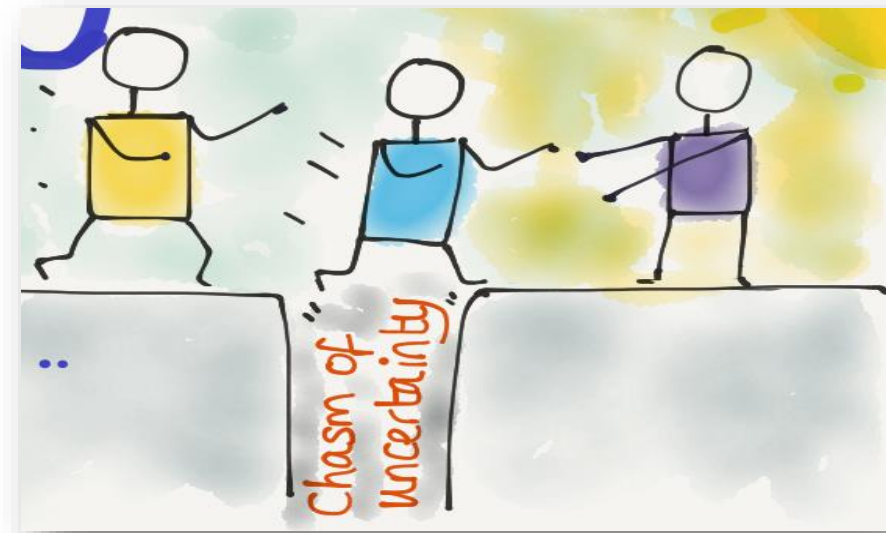
Moral injury  
destroys spiritual  
energy



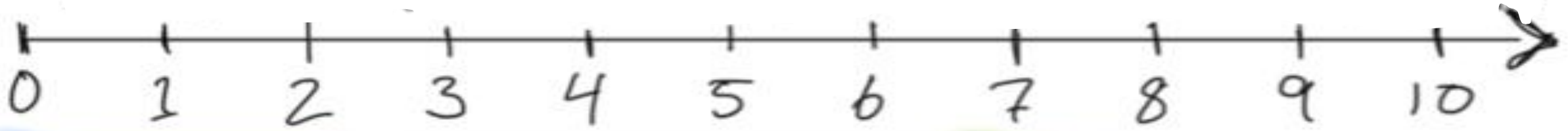
# Psychological Energy

*Energy of courage, resilience and feeling safe to do things differently without ridicule or criticism*

Involves feeling supported to make a change  
and trust in leadership and direction



# Where is your team on this scale?



**We have a toxic unsafe environment where .....**

- We hold back from voicing concerns
- People are not always kind or civil to each other
- We fear what we say might be used against us in the future

**We don't have glaring psychological safety issues, but.....**

- We hold back our ideas or views to look competent, reliable and trustworthy
- Conversations between different professions or groups can feel like debates or negotiation
- People don't want to hear different views and it's hard to make change happen

**We are making progress towards our goals because we.....**

- We collaborate effectively across professions and teams
- We can speak up with ideas, questions and problems
- We can challenge things without fear of criticism or being made to look stupid
- People are open to change and learning when changes don't work

*Psychological safety: A belief that we will not be punished or humiliated for speaking up with ideas, questions, concerns or mistakes*

Amy Edmondson: [Psychological safety is not a hygiene factor](#)

# Physical Energy

*Energy of action, getting things done and making progress*

The flexible, responsive drive to make things happen



# Intellectual Energy

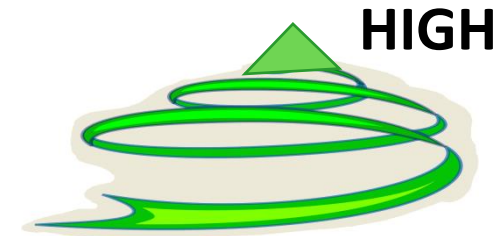
*Energy of analysis, planning and thinking*

Involves gaining insight as well as planning and supporting processes, evaluation, and arguing a case on the basis of logic/ evidence





# High and low ends of each energy domain



***Social***

isolated

solidarity

***Spiritual***

uncommitted

higher purpose

***Psychological***

risky

safe

***Physical***

fatigue

vitality

***Intellectual***

Illogical

reason

# THE LANCET

Volume 388 · Number 10057 · Pages 2209–2322 · November 5–11, 2016

[www.thelancet.com](http://www.thelancet.com)

“Physicians, disillusioned by the productivity orientation of administrators and absence of affirmation for the values and relationships that sustain their sense of purpose, need enlightened leaders who recognise that medicine is a human endeavour and not an assembly line.”

See Comment page 2216

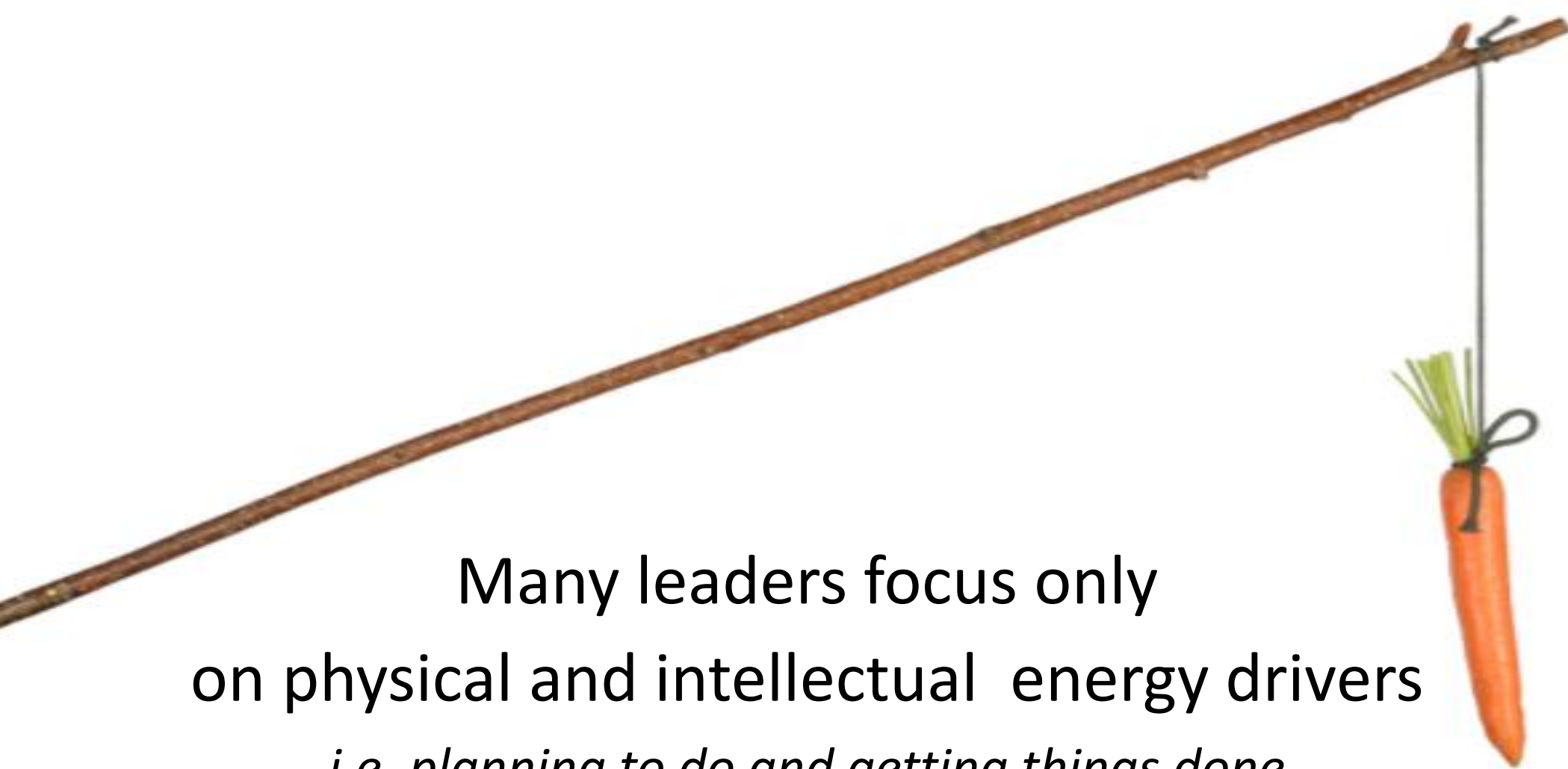
# The challenge of an over-focus on intellectual energy

- Intellectual energy on its own isn't transformational
- It keeps leaders in their comfort zone (intellect to intellect)
- Common values drive behaviour change more than data



<http://www.newyorker.com/magazine/2017/02/27/why-facts-dont-change-our-minds>

[You can't change fundamental behaviours without changing fundamental beliefs](#)



Many leaders focus only  
on physical and intellectual energy drivers  
*i.e. planning to do and getting things done*

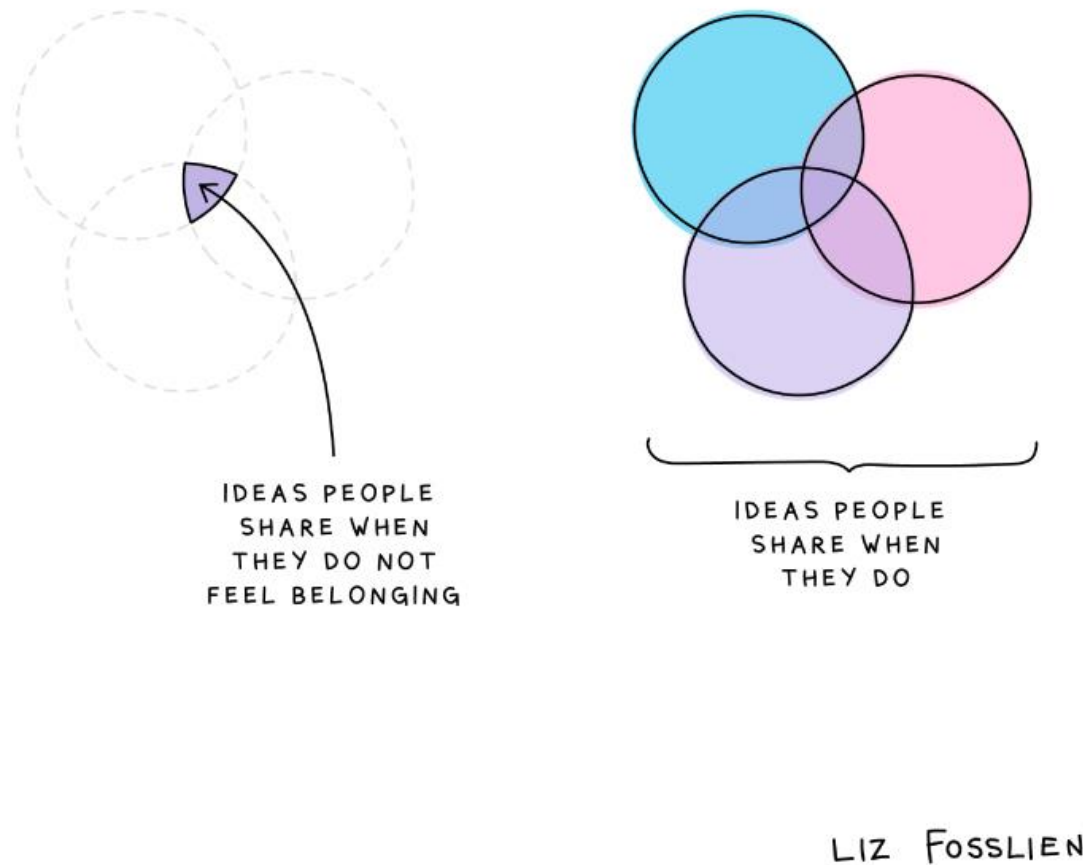
# Ten things we have learnt about recovery

1. People recovery and service recovery aren't just connected. They're the same thing
2. Recovery is inherently relational: it needs social, spiritual and psychological energy
3. Undertake improvement for people and service recovery in ways that energise, motivate and give people autonomy and control
4. Take a service-user and person-centred view of the world
5. Address moral injury
6. If teams are the primary unit for recovery, we must support team leaders and line managers as the prime enablers of recovery
7. Invest in the time and (psychologically safe) space to connect, collaborate and innovate
8. Take the opportunity to work in new, aligned ways
9. Improvement as the default
10. Share, share, share





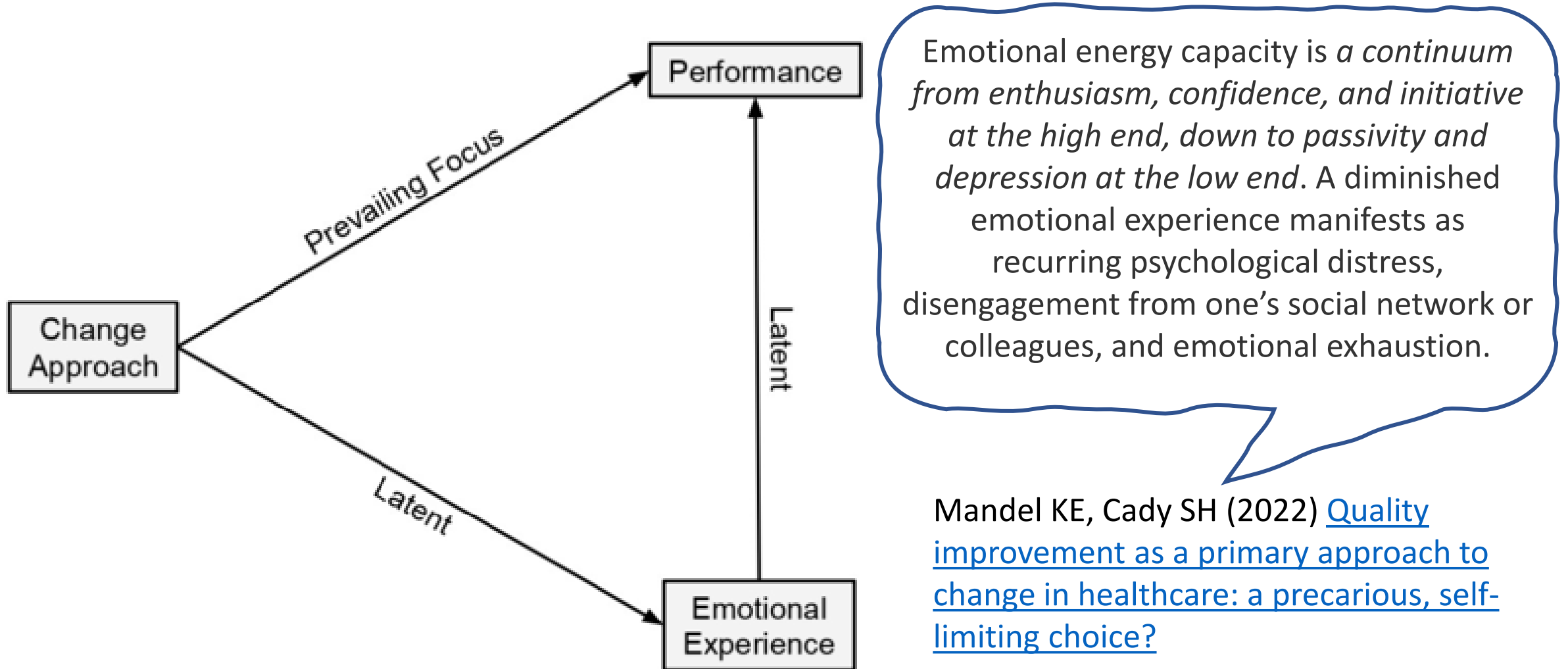
Workers who feel connected to their colleagues are three times as likely to report that they maintained pre-pandemic levels of productivity



Source: "What You're Getting Wrong About Burnout"  
By Liz Fosslien, *MIT Sloan Management Review*, August 2021  
[sloanreview.mit.edu/article/what-youre-getting-wrong-about-burnout](https://sloanreview.mit.edu/article/what-youre-getting-wrong-about-burnout)

[https://sloanreview.mit.edu/article/what-youre-getting-wrong-about-burnout/?social\\_token=4df7d91cfd5e8fca190db7c686480995&utm\\_source=twitter&utm\\_medium=social&utm\\_campaign=sm-direct](https://sloanreview.mit.edu/article/what-youre-getting-wrong-about-burnout/?social_token=4df7d91cfd5e8fca190db7c686480995&utm_source=twitter&utm_medium=social&utm_campaign=sm-direct)

# Most improvement approaches in health and care underplay the role of emotional experience in creating energy for change



**The hierarchy of capabilities:** the further up the pyramid people go, the more we maximise the contribution everyone can make



Source of model: Gary Hamel, Michele Zanini (2020)

*Humanocracy: creating organisations as amazing as the people inside them*

**The hierarchy of capabilities:** the further up the pyramid people go, the more we maximise the contribution everyone can make

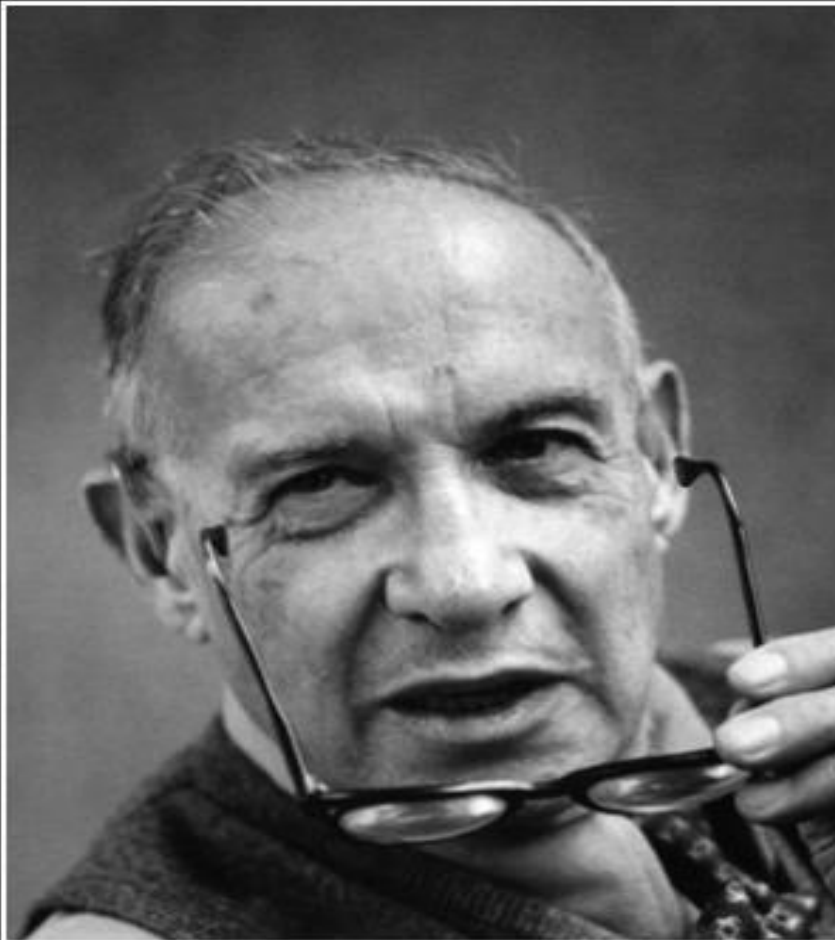
Which  
energies at  
which level?



Source of model: Gary Hamel, Michele Zanini (2020)

*Humanocracy: creating organisations as amazing as the people inside them*

# Focus on your own energy first



Your first and foremost job as a leader is to take charge of your own energy and then help to orchestrate the energy of those around you.

— *Peter Drucker* —

AZ QUOTES



# The 5 Energies of High-Performing Teams

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## Intellectual

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## Spiritual

Commitment to a common vision for the future, driven by shared values and purpose.



## Physical

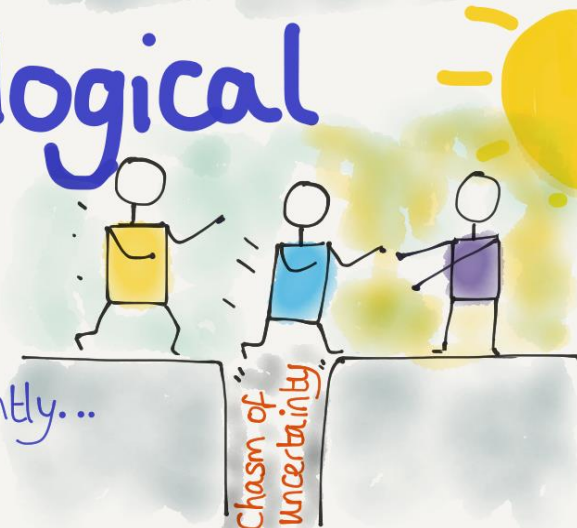
Getting things done!  
Making progress.

@HorizonsNHS

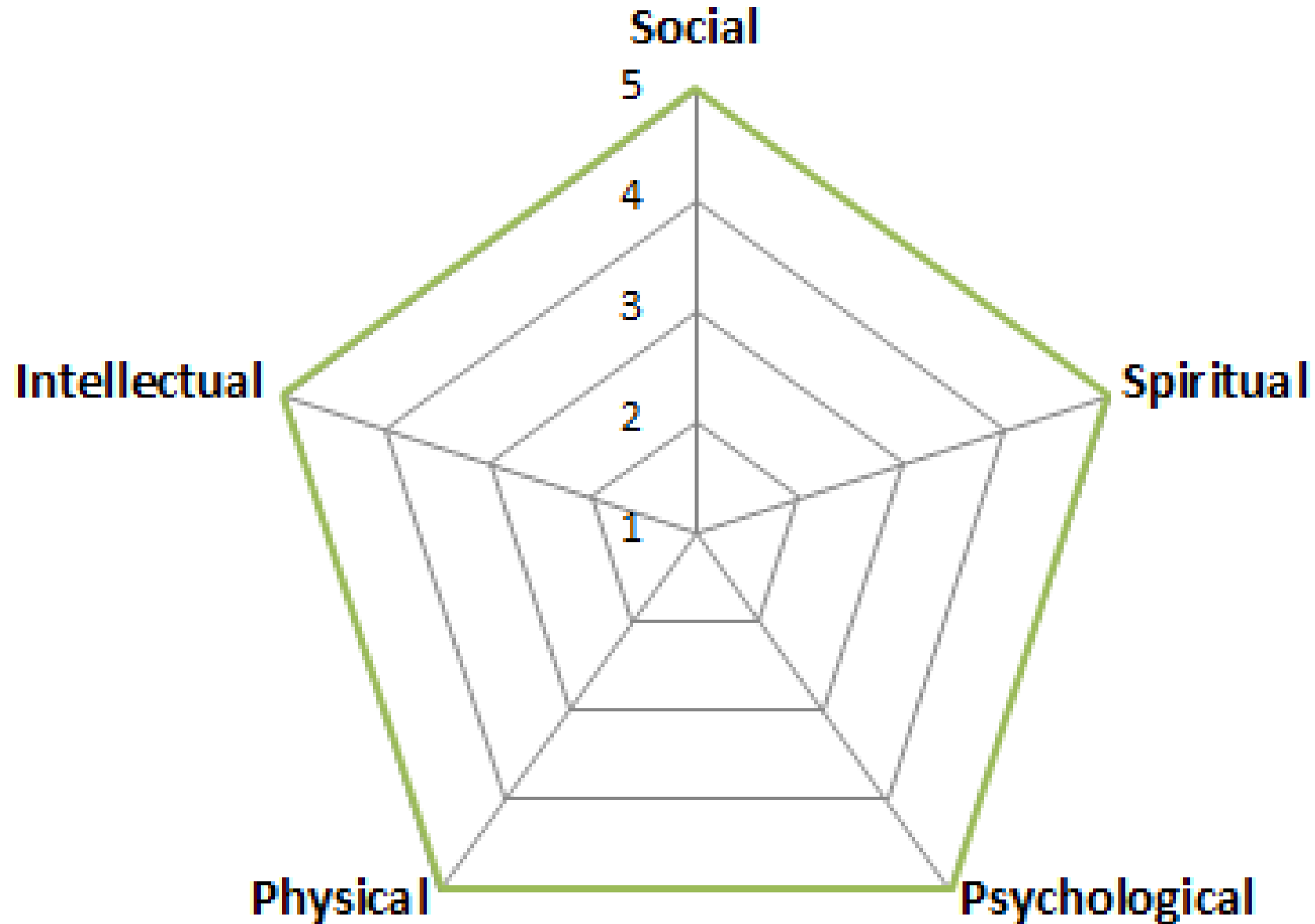


## Psychological

Courage, resilience, feeling safe to do things differently... and take risks.



# Where's the energy for change in your team?



# How do we build social energy?

We build social energy in a group (socially) so first define who is part of the group:

- Who is part of the extended team and needs to be included?
- Include people with lived experience

Make time for the informal “water cooler” moments

In the team, create “power with”, not “power over”

Listen like an ally

Work on key tasks together

Build a climate for social energy: openness, fairness, inclusion and welcoming uniqueness

## Social

Personal engagement, relationships and connections between people.



Build routines that create social energy eg, checking in and out of every meeting

Focus on what unites us rather than what divides us

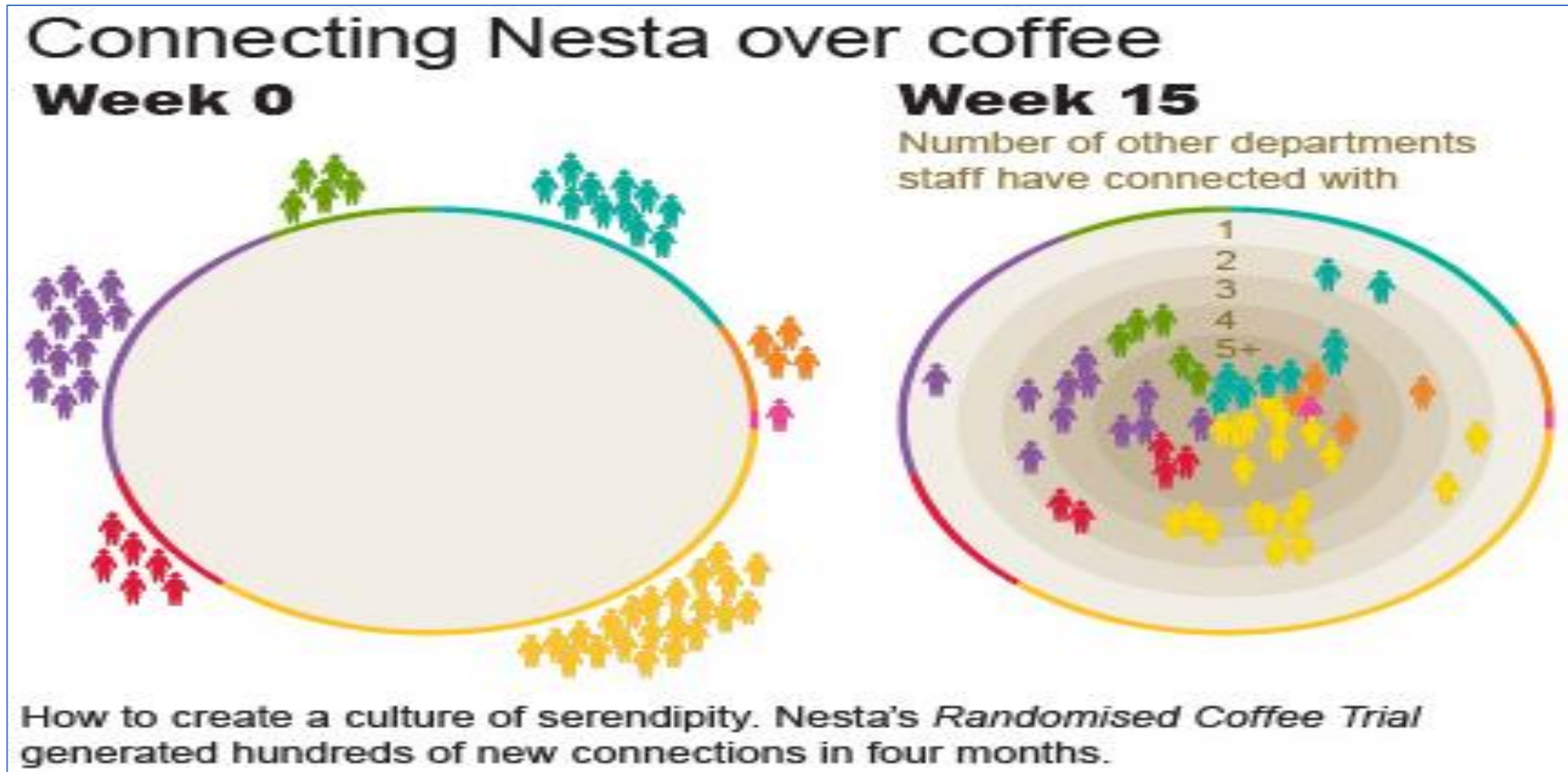
Encourage space for creativity and play

Demonstrate what we appreciate about each other

Get to know everyone – knowing someone, understanding how they think, how they feel about topics, understanding the unique things about individuals



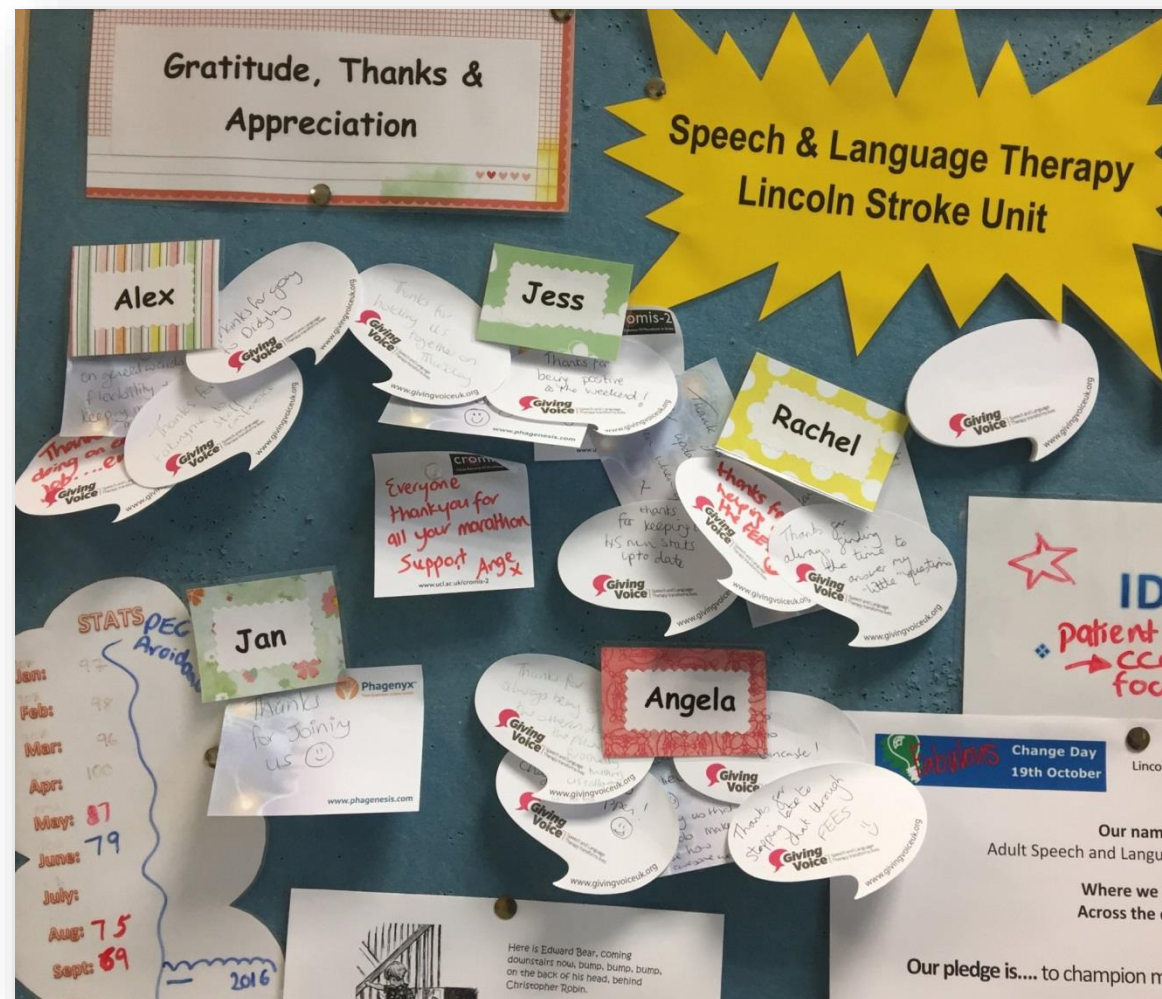
# We can build social energy across a whole organisation or system



Randomised coffee trials: <https://conversational-leadership.net/randomised-coffee-trials/>

# Remember!

We have to work especially hard to build social energy in a virtual or hybrid world - where the lack of direct contact makes feelings, emotions and reactions harder to gauge



Practice gratitude, thanks and appreciation @shimada\_angela



# How do we build spiritual energy?



Take action to build shared purpose:

## SHARED:

- Start with each individual talking about their own stories (“what matters to me”)
- Talk about the parts of the stories that unite the group
- Discuss differences in perspective and how differences will be addressed

## PURPOSE

- Consider how the sense of “us” (shared values and ambitions) can be translated into a statement of shared purpose that we can all unite around

Use “our shared purpose” as a road map towards our collective destination

When presenting data, build a compelling story around it that takes it back to higher purpose

Avoid “de facto” purpose

Make space to discuss moral injury and other aspects that makes people feel that they are being asked to do things that go against their basic principles

Mobilise people for change by connecting with emotions, through values

Keep shared purpose alive:

- Connect shared purpose with the work you are doing
- Tell stories that connect with spiritual energy
- Talk about it
- Build it into organisational routines, eg, induction processes, performance reviews, 1:1 conversations

## Our

Who are the people who will be impacted by the change? Who will need to be part of the change?



## Shared

What unites us?



## Purpose

Why are we taking action?  
How does it connect with the things that really matter to us?

# #END PJ PARALYSIS

OUR

Patients  
Nurses Families  
Physios Senior leaders  
Doctors Care assistants  
Students

STARTED

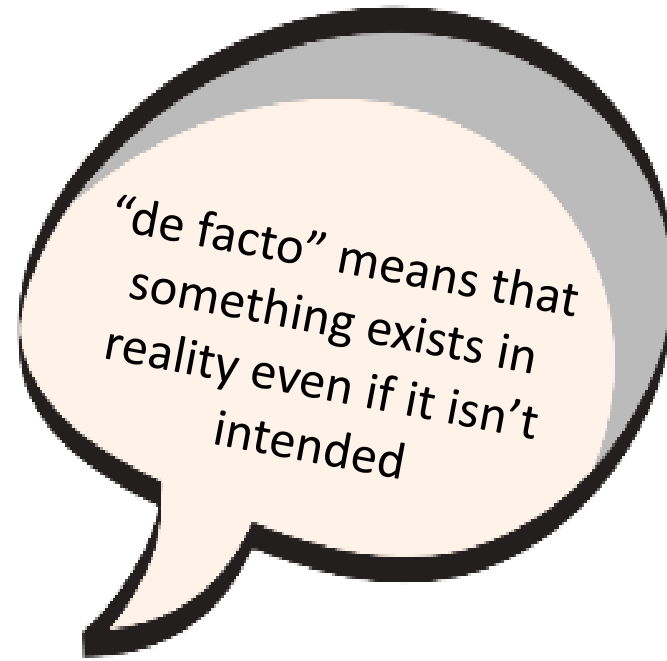
Anger & outrage  
at older patients deteriorating  
when we can do something about  
it

PURPOSE

To make sure  
that every person in a  
hospital bed gets mobilised when they  
are ready (clinically & personally) & that  
every person gets choice & a chance  
for the future life they want

# Avoiding “de facto” purpose

- Shared purpose can easily be displaced by a “de facto” purpose:
  - hitting targets, standards or key performance indicators
  - reducing costs
  - reducing discharge delays
  - complying with regulators
- If purpose isn’t explicit and *shared*, then it is very easy for something else to become a de facto purpose in the minds of the workforce
- De facto purpose is toxic, leads to burn out and blocks engagement



Source: [Delivering Public Services That Work: The Vanguard Method in the Public Sector](#)

# How do we build psychological energy?



## Actively build a safe environment by:

- Asking people how they are and getting to know everyone by understanding how they think, how they feel about topics
- Regular group and 1:1 conversations to deeply understand colleagues and team members
- Dealing with things when they come up

## Destigmatise feedback by:

- Practicing giving regular constructive feedback and asking for feedback
- Making the giving of feedback a team norm
- Working out loud. Share your work when it's in progress, even if it's messy, and ask others to do the same

Create norms (a “team charter”) that build psychological safety and agree to hold each other to account

- Determine what the actions will be if people break team norms

Talk openly about past failures and good things that came from them

Reframe “failure”  
as learning

Make quick debriefs part  
of finishing up projects

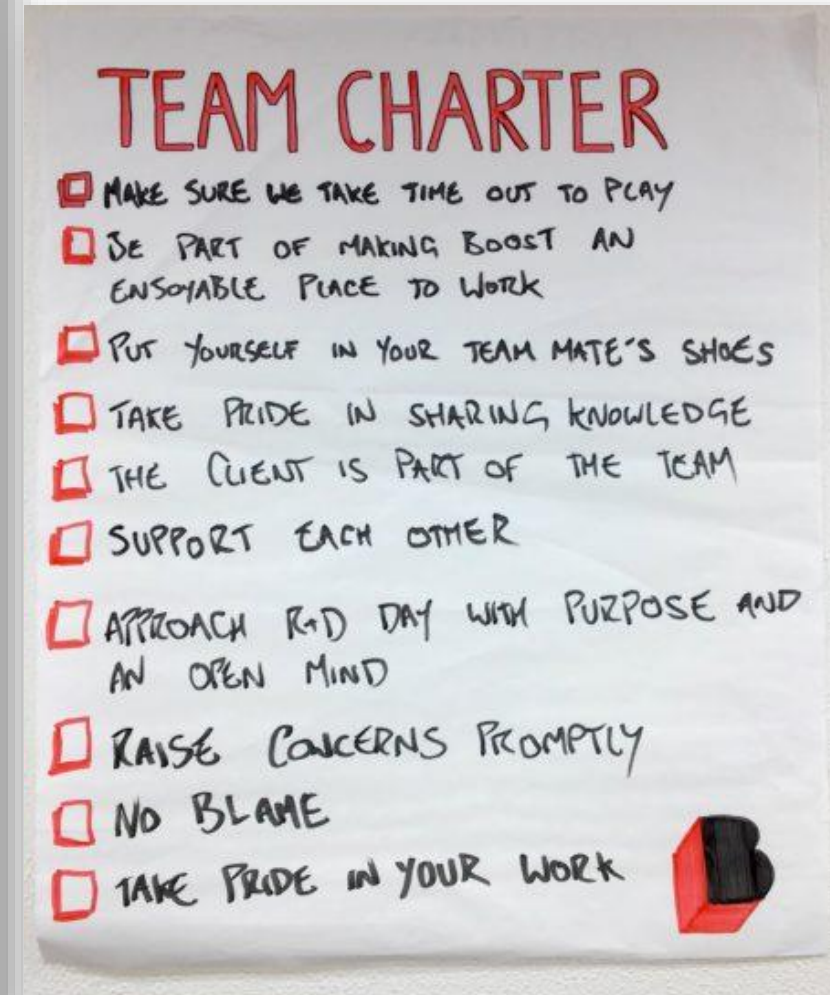
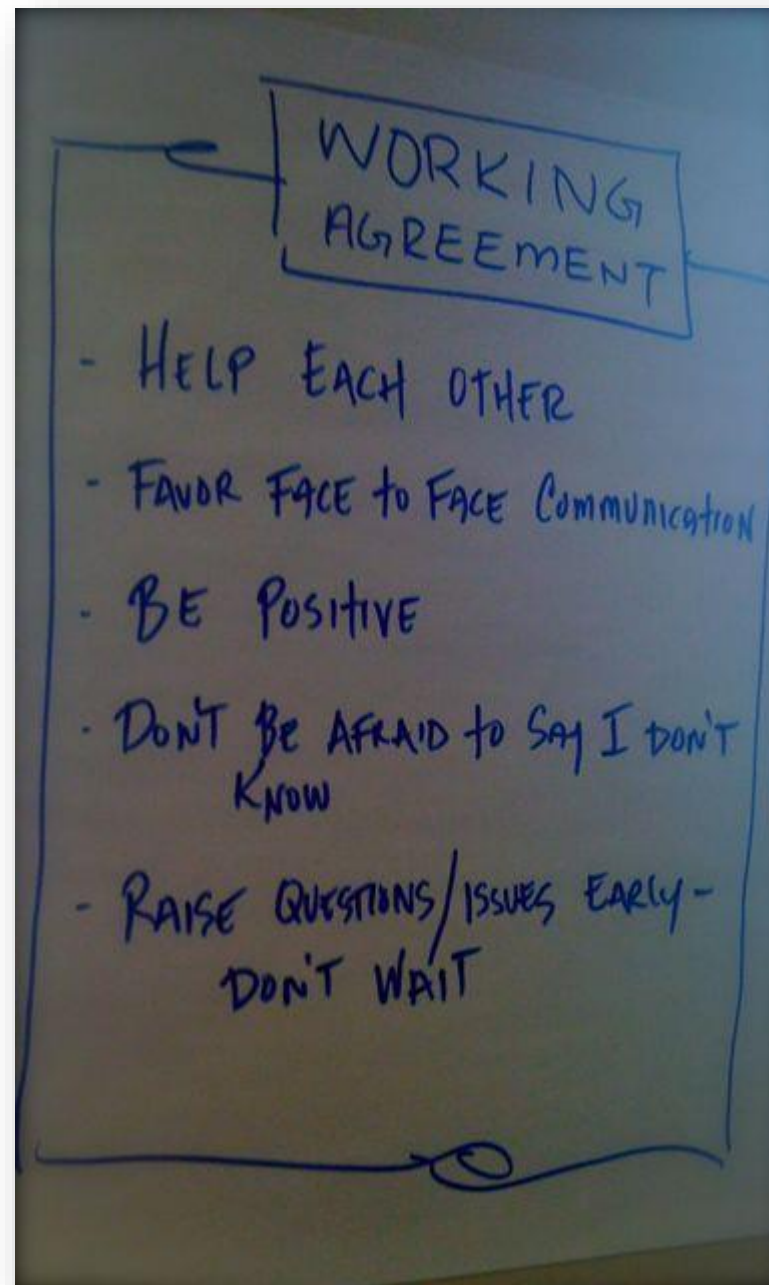
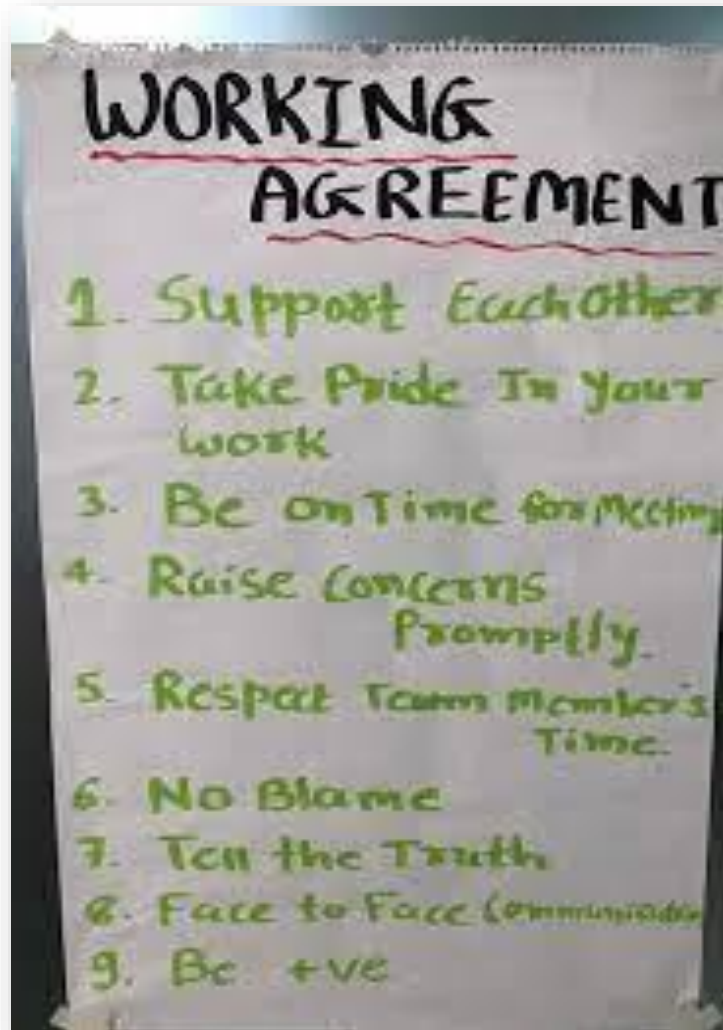
Promote speaking up. Publicly praise others for being candid or going against the grain. Endorse discussion techniques that hear from everyone

Always give credit to  
the right person  
when their ideas are  
taken up

The very best way  
to make speaking  
up worth it is to  
act on  
suggestions



# Create Team Norms



# How do we build and sustain physical energy?



Rather than setting goals that seem overwhelming and unachievable, create short, achievable milestones that allow a sense of progress and enable individuals to manage their energy levels

Do meaningful things, share and celebrate progress

Collect data and information to show the positive difference that is being made

Encourage people to take leave throughout the year

Monitor physical energy to avoid burnout

Design the work to have ebbs and flows: everyone cannot be working "at the top of their licence" continuously

Know the warning signs of burnout and act immediately

Check-in and assure your team they can discuss levels of physical energy with you

Set (and model) healthy work boundaries

Create fun, relaxed team-building opportunities

Help establish a healthy work-life balance

Make sure everyone gets a lunch break and other breaks

# How do we build and sustain intellectual energy without it dominating all the other energies?



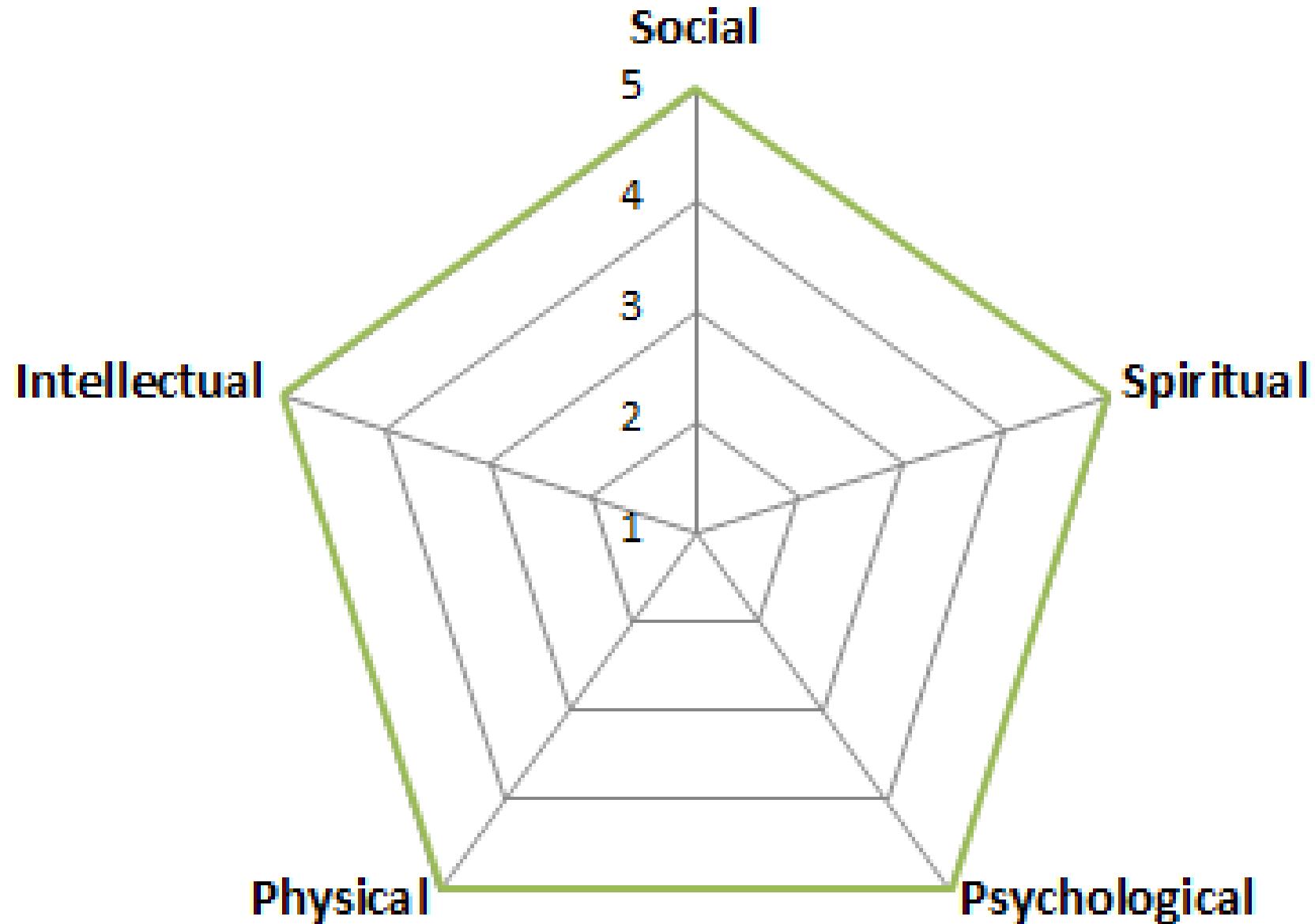
## **Build intellectual energy by:**

- Regularly reading research reports and other sources of new information
- Developing business plans and programme plans
- Developing and connecting to research, evidence and strategies
- Using data and evidence to plan thoroughly
- Building analytical capability
- Writing papers and reports

## **Avoid intellectual energy dominating by:**

- Consciously building the higher purpose “why” into every business plan and project document
- Avoiding de facto purpose (see spiritual energy)
- Involving people who will be impacted by change as early as possible in the planning process
- Training project and programme managers in the psychology of change as well as the technical aspects of programmes
- Expecting and allowing for emergence in change initiatives and don't expect the plan to work
- Building in time for learning and reflection about what works
- Taking a spirit of experimentation and testing new ways of working
- As senior leaders, actively role modelling all five energies

# Where's the energy for change in your team?



# Igniting energy for change

**What actions will you take to build energy for change?**

- Discuss it with others on your table/ in your group



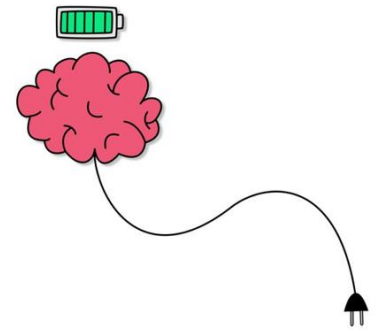


# *Reflections*





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