3.1 Goal Setting

Taking the time to set goals will help build a strong foundation for your impact workforce strategy, enable you to measure success and impact, and lead to further buy-in from stakeholders. Building this strong foundation will then lead to greater chances of long-term sustainability, as impact workforce programs can then be embedded into the culture and business of the institution.

The people or department(s) responsible for setting the high-level goals for an impact workforce strategy varies among healthcare systems. However, it is common for the executive leaders to set the vision while leaving the goal setting to the departments that are tasked with implementation. Much of the goal setting process, such as interpretation of the vision and metrics development, is often done by the leaders of those departments, while the designing, planning, and implementing of the programs are done by the designated team within those departments.

The purpose of this section is to help with the formation of goals, ensure that critical partners are at the table as goals are being set, and make sure that all stakeholders' voices are heard and considered.

Form an Advisory Planning Group

Form an advisory planning group made up of leaders of all departments who have a stake in the strategy's success, will be affected by impact workforce programs, and whose buy-in and leadership are critical to achieving success. These leaders will ensure the goals and objectives that are created reflect the vision and the values of the organization—and its anchor mission—as well as meet business needs. Consider a planning group made up of leaders from departments such as:

- Human Resources (particularly including Talent Acquisition, Workforce Development, and possibly Organizational Learning and Development)
- Community Health
- Community Engagement
- Department leaders of the areas you will want to include in your impact workforce efforts

Additionally, consider bringing in the perspectives of:

- *Key hiring managers*, who, when involved at an early stage, will be invested in the success of the program and will be champions and supporters of intentional, outside-in programs. They can then help develop buy-in from additional managers who will be supervising new employees.
- *Community partners*, who can identify needs and resources and bring knowledge about the communities of focus to the goal-setting process.
- *Data and information system professionals* who can advise about tracking metrics and setting up systems to measure impact.
- *Internal government relations and/or policy-advocacy teams*, who can advance a policy agenda that could accelerate workforce development.

Through an educational and collaborative process, ensure that all involved understand and are committed to the work. As goals are created, ensure that each stakeholder is able to execute on their role in order to reach those goals, and take the time to consider the implications of a goal to make sure it will benefit both

the community and the health system as intended, and that it will be a driver to build community wealth.

Setting Goals Note

We have found it to be best practice to have a dedicated workforce development professional lead the advisory planning group. Once the advisory group sets the goals and strategy, the workforce development leader will coordinate efforts among the stakeholders and various departments. However, even during the implementation phase, the advisory group should continue to meet from time to time to make sure everything is on track. Other people that can be added to this group once the goals are set may include other managers of the target departments who can inform the team about implementation details, successes, and challenges. In addition, a career coach who helps people navigate the internal systems of advancement would be a great addition to help realize the system's goals, as they often have greater insight into personal issues and barriers that may need to be addressed, such as childcare and transportation.

Understand Key Terms

When collaborating across departments, it is important to make sure everyone involved is using a set of mutually understood terms. It is critical for communication and for metrics collection that there be a clear understanding of terms such as ***impact hire, quality jobs, and impact promotion***.

- Impact hires are individuals who are hired into a quality job requiring less than a Bachelor's degree through an intentional, outside-in pathway or program or partnership which has a focus on place. Individuals must either:
  - Reside, at the time of hire, in targeted economically disadvantaged zip codes or more granular geographic areas (e.g., Area Deprivation Index zones, Census block or tract) that your organization serves.
  - Or, they can enter the institution through a partnership with a community-based, workforce, or educational organization that has a focus on reaching communities within economically disadvantaged geographies that your organization serves.

- A Quality Job:
  - includes employer-paid/subsidized health insurance
  - includes paid leave
  - includes employer-funded retirement benefits (e.g., employer contributions to 401(k))
  - pays at or above the local living wage (see MIT Local Living Wage calculator)
  - provides a stable schedule and stable hours
  - has either an established career pathway or earning growth opportunities

- Impact promotions are current employees in positions requiring less than a bachelor's degree who, through an intentional internal pathway program or initiative, obtain either 1) a promotional opportunity into a higher-skilled job with higher wages or 2) a lateral move to a position at a comparable wage level with greater career ladder opportunities.

> Make sure to define terms so that they can be used to track metrics for new hires and employees involved in any impact workforce program.

Define "Local"

Define ***local*** by zip codes, neighborhoods, or areas where your system would like to have an impact that have high numbers of households with low incomes and/or high poverty levels. This can include more granular geographic areas (e.g., neighborhoods identified as most disadvantaged through the Area Deprivation Index, which ranks census block groups according to relative economic disadvantage), in your catchment area that are experiencing health disparities as identified by your Community Health Needs Assessment (CHNA).

How to Set Goals for Impact Workforce Strategies

The goal-setting process will differ depending on the type of program being implemented, but certain common aspects of goal setting can be utilized in this process.

Include local populations and specific job codes for recruitment and workforce development goals

- *Focus geographies:* Ensure that recruitment efforts include outreach and support in economically disadvantaged zip codes and neighborhoods in which your healthcare system has hospital campuses or which fall within the system's service area.
- *Target job codes:* Assess the jobs that are high-demand, high volume, and/or have high turnover, then determine which of those jobs match up with the skill sets and educational attainment in your local zip codes. Set outreach goals around job codes that are accessible for people who live in these areas.
    - Successful outside-in programs often focus goals on the cross section of jobs that are high-demand and also align with the range of skills and education level that your data shows people in the focus neighborhoods possess. Paying attention to both the system's hiring needs, as well as to the positions that are accessible, can ensure a strong business case for buy-in and longevity of the program.

Set goals for local sourcing, recruitment and retention

- *If your institution is developing new outside-in pathway programs:* Assess how these programs could be leveraged to make progress towards strengthening the local talent pool and enhancing economic opportunity for residents in the health system's service area, with specific attention paid to economically under-resourced geographies. This can be accomplished by tracking local hiring practices within the service area (such as specific geographies identified in the CHNAs), and developing strategies to source and recruit from those areas. Examine data that shows local hiring numbers currently, and consider these questions:
    - How many people from specific targeted geographies are currently hired through the traditional application process?
    - Where are there gaps in access to career opportunities within the organization?
    - Where are the opportunities to partner with local institutions to build and strengthen the talent pool?

- *If your institution has developed baselines for outside-in pathway programs:* Choose both a realistic and aspirational goal—this can be numerical or a percentage—to reach for growth year-over-year of impact hires and workforce development programs. For example, health systems that signed onto HAN's Impact Workforce Commitment set goals to reach at least 10% of new hires as impact hires annually by the end of 2027. Some systems set incremental goals to reach ahead of the 2027 target aligned with their anticipated addition or expansion of intentional, outside-in pathways and programs.

Plan for longevity and set goals for success

- *Be cohesive:* While most programs start small (oftentimes at a single hospital or within a single

department), whenever possible set up a structure for goals and objectives that are scalable and in the future could be implemented hospital-wide and then system-wide. Running three differently structured initiatives at three different hospitals will likely make it hard to grow and implement a larger practice should the initiatives be successful.

- *Set goals for retention:* Create goals for retention to track success of the program and understand how the program may need to adapt or adjust to result in higher retention of new hires.
- *Plan for attrition:* There are times when things just do not work out because we are working with human beings, so factor in a reasonable turnover rate.

Assess Goals Over Time

A program's goals may need to change over time as business needs change and adjustments are made to priority jobs. Build goals for impact workforce programs to reach year-over-year growth, even if this growth is not always achieved. This sets up a vision for growth that encourages regular innovation, supervision, and improvement of the program to help meet the program's goals.

Goals and Metrics Over Time

The first few years will likely be spent testing different program and process models to understand what is possible and realistic for growth. In these early years, plan for goals to be revisited and adjusted to best fit the findings and outcomes of the previous year, acknowledging that initial goals may not always align with reality and that adjustments may be necessary. As not all pilots or programs are successful, it is best practice to regularly reevaluate the needs of hiring managers and the health system and track the number of people going through specific training programs or pathways from local geographies, in order to pivot the current programming if needed.

In future years, once a baseline of data and metrics is established, you can leverage this information to expand goals, find places for innovation within the program, and create buy-in for other related programs.

Institutionalizing Impact Workforce Practices

In the life cycle of impact workforce programs, there comes an inflection point at which a program will either terminate or will become institutionalized as part of the way the health system does business. As your team works to embed new programs and practices into the fabric of the organization, consider these key enabling factors in the areas of leadership and mission alignment, strategic partnerships and collaboration, communications, and data:

Leadership and Organizational Alignment

- Have key leaders at multiple levels of the organization developed a vested interest and sense of ownership in the program's success?
- Have new leaders and stakeholders received an orientation about the program and developed a deep understanding of the importance of the work and how it should be prioritized?
- Has the organization clearly articulated how its impact workforce/anchor mission strategies fit with its organizational goals, values, and commitments?
- Are there dedicated leaders accountable for impact workforce programs?
- Have the organization's policies and practices been adapted to accommodate the programs beyond the tenure of those who initially designed and implemented them?
- Is there a cross-functional team that comes together regularly to plan, problem-solve, and collaborate on shared goals (e.g., HR, community engagement, departments of focus of the program)?
- How does your organizational culture encourage shared learning and new ideas among all levels of leadership?
- If funding is needed to continue the program, have sustainable funding streams been developed?

Strategic Partnerships and Collaboration

- Are you engaging in peer learning and collaboration to address problems and to build and share best practices?
- How are you listening to and centering community voices, priorities, and assets in your partnership strategies?
- Are you building strong and lasting relationships with intermediaries and community partners to help advance impact workforce goals?

Communications

- Do you have internal communications strategies that increase system-wide awareness of the program and its successes?
- Do you have external communication strategies that build trust and support with external stakeholders?
- Have you widely communicated the success of the program? Do employees beyond the leaders know about it? Do your communities and populations of focus know about it?

Data

- Have you clearly defined what you want to achieve with your initiatives and how you will track progress?
- What metrics are you collecting to help show how the program has met key business needs?
- Do you have in place tools and systems needed to collect and keep track of your program participation and outcomes?
- Are you regularly using data to drive learning and improvement, inform goals, and highlight successes?
- Are your data and metrics effective in monitoring progress, identifying gaps, and measuring the impact of your strategies?

Generally, most systems find that if the above points are considered, as a pilot program or initiative is implemented and becomes successful, it becomes easier to grow the initiative—often to the point where the initial pilot evolves into a well-established program that is an effective hiring stream. As an initiative grows, it may be necessary to expand initial goals around focus populations beyond the original geographies in order to adjust for attrition and additional hiring opportunities. Similarly, it may become possible, and perhaps necessary, to expand and develop outside-in pathway programs for additional jobs beyond those originally planned.

Develop Buy-in and Sense of Ownership Across All Levels of Leadership

Strategize working with leaders at all levels, and ensure that each person understands that they are a critical part of the impact workforce strategy as well as the role they will play to drive success. This level of ownership and buy-in will lead to the success of new outside-in programs and workforce development initiatives.

Buy-in from executive leadership

- *Leverage data:* Build your business case and communicate it openly and regularly with executive leadership. Leverage metrics and data to emphasize the business need by highlighting:
  - Supply and demand opportunities around the neighborhoods of focus, job codes, and how the program can fill a needs gap.
  - Expected return on investment (ROI) or impact on the business, which could include:

        - improved retention
        - improved skill levels of workers by incorporating training into the hiring process
        - the many ways this program can bring value to the organization that might not be easily quantifiable—for example, by improving the institution's reputation in the community and improving employee engagement through stronger community connections

- *Identify champions from within the executive leadership team*: Leverage their expertise and interest in this work to gain further support from other leaders. The support of a champion can be used to garner traction for a pilot program or for further growth of existing programs.
- *Start with a pilot program:* Use the data and information from the business case to help shape a small program that targets departments or positions where there is recognizable demand. Once in place, use the experiences of those within the program to craft stories about the value added, and convey those stories to leadership and the system at large.
- *Bring leadership and community members together:* Create opportunities for leaders who may not initially understand the value of the program to meet community members and team members who have been positively impacted by the effort. This can be an effective means to help leadership recognize the importance and value of these strategies.
- *Utilize a strong communication strategy:* Executive leaders often need information on a regular basis to help keep this priority at the top of their minds. A communication strategy that regularly highlights success stories and the positive business case of the program can influence leadership during the budgeting process and can set a strong foundation for potential appeals to grow the program.
- *Designate an accountable executive:* Impact workforce programs are most sustainable when leaders actively sponsor this work. Encourage champions and interested executive leaders to play an active role in the program and become regularly involved in the program's planning and management.

Buy-in from Hiring Managers

- *Actively engage hiring managers from the start:* Working with hiring managers during the planning process can provide them with the ability to shape the program in a way that will benefit their team. It will encourage managers to consider the program's participants when making future hiring decisions.
- *Highlight the program's purpose, goals, and impact on retention:* Working with hiring managers on the front end to understand the purpose and structure of the program will help set the program up for success. Hiring managers will be more likely to be on board and support the program when they understand that increased training for applicants can lead to higher skilled candidates and improved retention rates for those new employees.
- *Work with champions*: Work with hiring managers who are already aligned and on board to encourage involvement of and support from other hiring managers.
- *Identify and change policies that may penalize managers for this work:* Analyze data collection and review processes for hiring managers, and consider these questions:
    - What incentives or disincentives do managers receive to pay attention to retention strategies?
    - Are managers required to guide their teams towards professional development opportunities?
    - Do managers get "credit" for helping employees move to higher-skilled jobs even if it means the person leaves their department?
    - Managers who are rewarded for helping employees move up the career ladder despite causing increased departmental turnover are more likely to support the strategy than those who may be negatively impacted for these same actions.

Buy-in from staff

- *Utilize mentorship structures:* Connecting new hires to mentors from within the staff often leads to the mentors becoming champions for this work. Mentors can uplift personal stories in daily conversations as well as within internal and external communication strategies, which can lead to additional staff

becoming involved. Broader participation builds greater staff buy-in.

- *Introduce new hires to the anchor mission during orientation*: Create a foundation for this work by introducing all new hires throughout the system to the anchor mission framework. Create buy-in by embedding the anchor mission as a value and goal of the organization, and develop a shared set of vocabulary for staff to communicate around impact workforce programs from the very start of a new hire's career with the system.
    - In particular, prepare to orient new leaders and managers who come into the system. Create an orientation that educates them on the goals, strategies, business case, and how it all aligns to the values and mission of the organization.

- *Protect against siloing*: Use the framework of a committee or working group that is made up of representatives from multiple departments (including members of HR, community health, executive leaders, and hiring managers) to communicate the purpose and goals of this work throughout the health system. Encourage committee or working group members to actively report back to their individual departments and spread the word about their programs and the anchor mission.

Internal communication to leverage successful buy-in

Robust internal communication

Communication strategies which highlight impact workforce programs should be shared with executives, physicians, and employees. Communications should highlight impactful stories of success and make a positive business case that emphasizes that intentional, outside-in recruitment, impact promotion, and the anchor mission are priorities for the system. By defining and regularly utilizing key terms throughout these communications, this strategy can also be critical to building a shared vocabulary around the anchor mission.

Know your audience

When communicating with different groups of stakeholders, such as leaders or employees, use your knowledge of the audience to recognize what type of story will best resonate with that audience. While some individuals will be most swayed with a story shaped by metrics and business data, others will be more motivated to hear about individual employees' successes. Some will be impacted by how an outside-in program or impact promotion initiative resolved a business challenge, while others may become a champion when the story highlights the success of an individual.

Align internal communication across departments

Aligning communication strategies across involved departments such as community health, human resources, and impacted clinical and operational departments as early as possible will lead to more coherent system-wide communications.

Encourage active discussion to ensure workplace expectations are clearly communicated and relevant to successful job performance

Bring awareness and education to executives, managers, and staff to understand potential cultural differences that may exist among employees that may impact hiring decisions, workplace culture, and employee retention. Having clear definitions of what makes a worker "good" or "bad" at their job and what "professional" means is critical to both creating buy-in as well as building a foundation for the success of any impact workforce program. Recognizing and acknowledging potential implicit bias in hiring, onboarding, training, and advancement may lead to adapting processes and policies for more successful hiring, retention, and advancement of people who enter the organization through intentional, outside-in pathways.

Setting the Groundwork and Gaining Trust for Successful Community Relationships

Buy-in from community partners

- *Discuss the benefit of quality over quantity:* Have a conversation with workforce intermediaries discussing the benefits of preparing their clients and customers for positions in the healthcare system. Pay particular attention to building an understanding of the skills, experience, and behaviors an ideal applicant has, as well as how the hiring process works. Provide a clear overview of your screening and interview process to help community partners find, prepare, and guide qualified applicants. While workforce intermediaries may sometimes be inclined to send large quantities of applications, explaining in detail the hiring process from the side of the health system can help intermediaries narrow down the applicant pool to find the best fit for the open opportunities.

Buy-in from potential applicants

- *Showing up:* To build trust in new communities you need to show up. This means physically attending meetings such as community town halls, hiring fairs held by workforce intermediaries, or community health events. To ensure the community both knows of the opportunities and sees these opportunities for themselves, consistent and long-term visibility at a community level is critical.
- *Know the community's history as well as your healthcare system's place in that history:* Before designing or implementing any strategies, it is critical to understand your community and its history and your healthcare system's place in that history. Understanding history helps break down any historical barriers or mistrust of the healthcare system. For example, historically in the U.S. many health systems have operated segregated facilities, provided substandard care to people of color, and excluded Black doctors from medical societies. If you know that your health system played a past role in discriminating against and excluding members of the community, acknowledging this history can help to build trust.
- *Work with community partners when choosing specific positions to target:* Work with community partners to pick job categories and career pathways that match up with the interests, skills, and education level of residents of the focus geographies. Make sure that there is also a concerted effort to educate the organizations about the different jobs in your system. Beyond nurses and doctors, the hundreds of jobs in the system may be quite hidden from the primary audience. Use data to determine education levels of people living in your targeted geographic areas. Consider going beyond entry-level jobs when choosing your targeted jobs. A program is more likely to succeed if the job codes are selected with input from the community as to what level or types of jobs they actually may be qualified for. The same is true of career pathways programs. A community intermediary or partner is more likely to have insight into the career pathways and growth opportunities that are most likely to engage and interest community members.
- *Assist applicants directly with the recruitment process:* Work with potential applicants to help them understand the application and training process as well as the services that will be available to help them succeed with application, training, and job placement.