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About the Conference

Business Research Intelligence Network's Healthcare Workforce Optimization Summit brings together nurse leaders, chief nursing officers, HR executives, workforce planning directors and operations leaders confronting the industry's most pressing staffing challenges. This two-day conference tackles the hard realities of nursing shortages, burnout and unsustainable labor costs while exploring practical solutions that are actually working in healthcare organizations today.

Attendees will move beyond theoretical workforce strategies to examine real implementations of float pools, flexible staffing models, retention programs and technology platforms that improve scheduling and reduce agency spend. The agenda addresses critical topics including predictive staffing analytics, cross-training programs, compensation strategies, workplace culture transformation and building internal talent pipelines. Sessions feature healthcare leaders who have navigated these same challenges and can share both their successes and hard-learned lessons.

Join us to connect with peers facing similar workforce pressures, discover approaches that are delivering measurable results and develop strategies to build more resilient staffing models. This is your opportunity to learn from organizations that have moved beyond crisis management to create sustainable workforce solutions.

Agenda

Day One – Thursday, January 28, 2027

7:15am – 8:00am
Conference Registration & Networking Breakfast

8:00am – 8:15am
Chairperson's Opening Remarks

8:15am – 9:00am
Float Pools That Actually Float: Building Internal Flexibility Without Breaking the Bank
Most float pools are either chronically understaffed or so expensive they defeat their own purpose. This session examines how smart organizations are building float programs that provide real staffing flexibility while controlling costs and maintaining quality. You'll learn what makes some float nurses love their roles while others flee after six months, how to structure compensation that's competitive without becoming your most expensive labor category and which competencies actually matter when you need someone who can function anywhere. This is a practical deep dive into recruitment strategies that work, orientation programs that prepare floats for reality, scheduling approaches that prevent burnout and metrics that reveal whether your pool is actually solving problems or just shifting them around.

- Compensation models that attract quality float staff without excessive premium pay
- Competency assessment frameworks for validating readiness across multiple units
- Scheduling strategies that balance flexibility needs with individual preferences
- Performance metrics that measure float pool effectiveness beyond simple fill rates

Steven Forti
Chief Wellness and Resiliency Officer
Hospital for Special Surgery

9:00am – 9:45am
Retention: What Actually Keeps People vs. What We Think Does
Staff can spot the difference between real solutions and window dressing. This session examines retention strategies that address what genuinely drives nurses and clinical staff away from organizations - which often isn't what leadership assumes. The discussion covers which workplace factors research shows matter most for retention, how to diagnose the actual drivers of turnover in your organization and why exit interviews reveal patterns leadership might be missing. This focuses on structural changes to how work gets done, how decisions get made and how staff are supported - not superficial engagement initiatives that don't address root causes.

Sheila Thompson, COO
Chief Operating Officer
Twin Cities Pain Clinic

9:45am – 10:15am
Networking & Refreshments Break

10:15am – 11:00am
Cross country session

11:00am – 11:45am
From Burnout to Capacity: How Employee Wellness Becomes a Workforce Strategy

Healthcare organizations cannot optimize workforce capacity without addressing the well-being of the people who deliver care. Yet employee wellness is often treated as an individual responsibility or a collection of programs rather than as a strategic component of workforce performance. This session explores how healthcare leaders can move beyond traditional wellness initiatives to create a more human-centered approach to workforce optimization—one that recognizes the connection between employee well-being, engagement, resilience, retention, and operational capacity. Using a coaching lens, attendees will learn practical strategies to better understand what employees need, identify barriers to well-being, create greater agency and connection, and incorporate coaching-based conversations into everyday leadership. Participants will leave with actionable tools they can use to strengthen employee wellness, improve the employee experience, and create the conditions for a healthier, more engaged, and more sustainable workforce.

Stephanie Gilliam, MN, RN, NE-BC
Director Mission Control
Oregon Health & Science University

11:45am – 12:30pm
Cultivating a High-Performance Team

In today's complex and high-stakes healthcare environment, cultivating a high-performance team requires more than operational efficiency—it demands intentional leadership that integrates mindset, culture, and human connection. Participants will examine how This presentation explores a comprehensive approach to building and sustaining high-performing teams by synthesizing key principles from *Anatomy of Leadership*, *Making Competent Organizations*, *Leadership: Thinking, Being, Doing*, and *The Energy Bus*. effective leaders align purpose, values, and behavior to create psychologically safe, accountable, and resilient teams. Drawing on the "thinking, being, doing" framework, the session emphasizes the importance of self-awareness (being), strategic clarity (thinking), and disciplined execution (doing) in leadership practice. Additionally, concepts from *Anatomy of Leadership* highlight the internal drivers of behavior and decision-making, while *Making Competent Organizations* provides insight into system-level competence, reliability, and learning cultures. The presentation also incorporates the positive leadership principles from *The Energy Bus*, illustrating how leaders can intentionally shape team energy, foster engagement, and build momentum even in high-pressure clinical settings. Attendees will gain practical strategies for enhancing communication, strengthening trust, promoting accountability, and developing a culture of continuous improvement. By integrating these perspectives, this session offers a holistic, actionable framework for healthcare leaders committed to developing teams that consistently deliver high-quality patient care, adapt to change, and thrive in demanding environments.

Corina Bahr RN/BSN
Patient Services Director
Hospice and Palliative Care of Eastern Idaho

12:30pm – 1:30pm
Luncheon

1:30pm – 2:15pm
Managing Multi-Generational Workforces: Beyond the Stereotypes
For the first time, nurse leaders are managing teams that span four, and soon five, generations. From nurses who practiced long before electronic health records to new graduates who have never charted on paper, today's workforce brings a wide range of experiences, expectations, and perspectives to the same unit. While generational differences exist, many of the assumptions we rely on are stereotypes that can create more division than clarity. This session focuses on what actually matters when leading across generations. Drawing on real-world leadership experience and workforce data, we'll explore how communication styles, feedback expectations, and career priorities can differ across generations—and how nurse leaders can adapt their approach without creating resentment or inequity. Participants will leave with practical strategies to recruit, engage, and retain nurses across generations while leveraging the strengths each group brings to the team. The session will also address what younger nurses are actually seeking from employers and how leaders can intentionally preserve institutional knowledge as experienced nurses transition toward retirement. Participants will leave with strategies to:
• Separate meaningful generational differences from common stereotypes
• Strengthen hiring and retention strategies across generations
• Use communication approaches that resonate with diverse age groups
• Support knowledge transfer as experienced nurses prepare to retire

Erin Kelley MBA, MSN, RN, CCRN
Nurse Manager
5W Advanced Heart Failure ICCU
Thomas Jefferson University Hospital

2:15pm – 3:15pm
Panel: Building Sustainable Workforce Solutions: From Crisis Management to Strategic Stability
Healthcare organizations have spent years firefighting workforce crises—filling shifts, managing callouts, battling agency dependency and watching turnover climb. But a few organizations are shifting from reactive staffing to sustainable workforce strategies that actually reduce costs while improving retention. The speaker will discuss how predictive analytics moved them from daily staffing scrambles to proactive planning, what it took to build internal float pools and flexible staffing models that reduced agency spend without compromising quality, how they created workplace cultures and communication frameworks that stabilized turnover, and the metrics they use to measure true workforce effectiveness beyond simple fill rates. The session addresses the hard transition from short-term fixes to long-term solutions, including how to secure leadership buy-in for workforce investments, where to start when resources are limited, and how to maintain gains when external pressures return.

John Renzi, DNP, MBA, CCCTM, NE-BC
Associate Chief Nursing Officer
Adjunct Faculty- Jefferson College of Nursing

Elizabeth Menschner, DNP, MAS, MSN, RN, NEA-BC
CEO
Pennsylvania Organization of Nurse Leaders

Steven Forti
Chief Wellness and Resiliency Officer
Hospital for Special Surgery

3:15pm – 3:45pm
Networking & Refreshments Break

3:45pm – 4:30pm
Building Your Own Pipeline: Growing Talent Instead of Just Buying It
External recruitment gets exponentially more expensive every year while internal development programs can create loyal staff at sustainable costs. This session examines how forward-thinking organizations are building career pathways that create talent rather than constantly competing to poach it from others. You'll explore successful models for CNA-to-RN progression, new grad residency programs that improve retention, leadership development initiatives that prepare staff for advancement and partnerships with nursing schools that create hiring pipelines. The discussion includes ROI calculations for development programs, strategies for keeping people after you've invested in their growth and cultural changes that make internal advancement feel achievable.

Elizabeth Menschner, DNP, MAS, MSN, RN, NEA-BC
CEO
Pennsylvania Organization of Nurse Leaders

4:30pm – 5:15pm
Who Will Care for Us? Understanding the Post-Acute & Long-Term Care Workforce
The post-acute and long-term care workforce plays a critical role in supporting patients after hospital discharge, yet significant challenges persist in workforce availability, training, and public understanding of who delivers this care. As demand for services continues to grow due to an aging population and increasing clinical complexity, providers across skilled nursing facilities, home health, and other post-acute settings continue to face staffing shortages and variability in workforce preparation. This session will provide an overview of the current state of the post-acute and long-term care workforce, including trends in staffing supply, turnover, and care delivery models. It will explore the evolving roles of interdisciplinary team members and highlight gaps in training and support that impact care quality and coordination. The session will also examine issues related to public transparency, including what patients and

families understand about who is providing their care and how that affects trust, engagement, and outcomes. Attendees will gain a clearer understanding of workforce dynamics shaping post-acute care today and will review policy and practice considerations to strengthen workforce capacity, improve training pathways, and enhance transparency for patients and caregivers navigating the care continuum.

Alex Bardakh
VP Government Affairs and Policy
CareConnecMD

5:15pm
End of Day One

Day Two – Friday, January 29, 2027

7:15am – 8:00am
Networking Breakfast

8:00am – 8:15am
Chairperson's Remarks

8:15am – 9:00am
Stress is Not Sustainable – Dealing with Today's Burnout Reality
Employees are an organization's greatest asset. Investing in their health and wellness is integral to employee engagement and is imperative to a successful patient experience. The organization's ability to empower the employee and partner with them in all recognition and improvement efforts are critical. Hear how creating an organizational culture of wellness will positively impact the organization, improve the employee experience, and ultimately increase customer satisfaction.
Key Take-Aways:
- Fresh perspective on understanding the connection between employee and customer experience
- Insights on employee engagement, wellness and emotional support
- Framework to optimize wellness through effective communication, empathy and compassion
- Techniques to empower the voice of the employee
- Best practices to create powerful relationships between leadership and the workforce.

Lisa Giocondi-Evernham MBA, RN, FACHE
Business Operations, Mayo Clinic
CEO, PurposedPath Executive Coaching

9:00am – 9:45am
Say It So It Sticks: The Clear Case Method for Workforce Solutions That Last.
Great workforce solutions often stall not because the idea is wrong, but because the people

who need to support it never fully understand or share the need. In this session, Ama Mathewos introduces the Clear Case Method, a five-step communication framework that helps healthcare leaders present workforce needs with the same clarity and structure they bring to patient care. Attendees will leave with a practical tool that turns competing priorities into shared strategy and builds the alignment workforce solutions need to last.

Ama Mathewos, MPA, BSN, RN, NEA-BC, CTA-CC
Assistant Vice President, Nursing Strategy, Leadership Development & Wellbeing
Maimonides Medical Center

9:45am – 10:15am
Networking & Refreshments Break

10:15am – 11:00am
The Workforce Crisis Nobody Saw Coming: Where We Are and What's Next
Let's be honest - healthcare workforce planning broke somewhere between 2020 and now. Turnover rates that used to be concerning are now just Tuesday. Travel nurse costs that seemed outrageous two years ago look like bargains compared to what desperate hospitals paid last month. This session will examine what actually changed in healthcare labor markets and why the old playbooks stopped working. Learn about which workforce challenges are temporary market corrections and which represent permanent shifts requiring new strategies. The discussion covers what's driving the current crisis beyond the usual suspects everyone blames, where labor markets are heading based on actual data rather than wishful thinking and which organizations are building models that might actually survive the next disruption.

Dr. Jacqueline Becerra
Director of Nursing
Methodist Metropolitan Hospital

11:00am – 11:45am
Staffing the System, Not Just the Unit: Workforce Management Through Capacity Coordination
Traditional staffing models focus on individual units, often leaving hospitals reacting to daily capacity crises. This session explores how system-level workforce coordination—through transfer centers, command centers, and centralized operations teams—can help hospitals manage staffing resources more strategically. Using operational examples from several healthcare organizations across Louisiana & Mississippi, participants will learn how organizations are aligning workforce deployment with real-time patient demand. The session highlights how centralized oversight improves communication between clinical teams, reduces delays in care, and supports more sustainable staffing practices.
Attendees will gain practical insights into workforce coordination models that help organizations move beyond shift-by-shift staffing decisions to system-level workforce optimization.

Jessica Crum, DNP, MBA, BSN, RN
Founder & Principal Advisor, Roshira Insights, LLC
Healthcare Operations Executive | Health System Operations & Transfer Center Leader

11:45am – 12:30pm
Safe to Stay: Creating Environments Where Nurses Thrive — Not Just Survive
The strongest nurse retention strategy isn't pay it's culture. Leadership presence, psychological safety, and real opportunities for growth are what truly keep nurses committed.
Nurses don't leave hospitals. They leave environments where they feel unseen, unsupported, and professionally stagnant. Retention improves when organizations intentionally create spaces where nurses feel respected, protected, and empowered to build lasting careers.

John Renzi, DNP, MBA, CCCTM, NE-BC
Associate Chief Nursing Officer
Adjunct Faculty- Jefferson College of Nursing

12:30pm
Conference Concludes

12:45pm – 2:45pm
Elevate Under Pressure: The Pressure Performance System™
Healthcare leaders are operating in an environment where pressure is no longer occasional—it is constant. Staffing shortages, competing priorities, workforce turnover, difficult conversations, rapid change, and decisions made with incomplete information can test even the most experienced leaders.
Elevate Under Pressure gives nurse and workforce leaders a practical system for staying effective when the stakes are high and the pressure is real. Based on the Pressure Performance System™ from the book, participants learn four repeatable moves—Regulate, Reframe, Decide, and Execute—designed to help leaders manage their own response, think more clearly, make sound decisions, and move their teams forward even when conditions are less than ideal.
Through real-world healthcare scenarios and hands-on application, participants will explore how to use the four moves in the pressure arenas they navigate every day:

- Decision-Making Under Uncertainty — Making staffing, operational, and workforce decisions when information is incomplete, priorities conflict, and there may be no perfect solution.
- Conflict & Difficult Conversations — Staying grounded and productive during challenging conversations with frustrated staff, physicians, peers, and administrators without allowing pressure to drive the interaction.
- Leading Through Change & Disruption — Maintaining clarity, trust, and team stability through turnover, restructuring, new care models, shifting expectations, and ongoing organizational change.
- High-Pressure Team Performance — Recognizing how a leader's response to pressure affects the team and learning practical ways to help others reset, refocus, and perform when demand is high.

Participants will apply the four moves to a real pressure situation they are currently facing and leave with a personal Pressure Performance Plan they can put into practice immediately. They will also receive a simple, repeatable tool for helping their teams regulate, refocus, and execute effectively during high-demand shifts and challenging moments.
The goal is not to eliminate pressure. It is to build the capacity to perform well because of how you respond to it.

Scott Sadler
ICF Professional Certified Coach
Scott Sadler Coaching and Speaking

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