

# State Flex Program Staff Sustainability Guide & Toolkit

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# Executive Summary

Turnover of key state Flex Program staff has been a problem since the inception of the Medicare Rural Hospital Flexibility (Flex) Program. Given the increasing complexity of health care and the many dimensions of the Flex Program, there is a steep and time-consuming learning curve for new Flex Program staff.

The **Staff Sustainability Cycle** is a process for improving retention of high-performing Flex Program staff – and as a result, strengthening continuity of support for rural hospitals and clinics in your state. The five components of the Staff Sustainability Cycle are outlined below, along with some key actions associated with each component.



## Recruiting

- When crafting job descriptions and advertisements, consider the future vision for the job, not just what it has entailed in the past.
- Plan ahead to make the process as streamlined as possible.
- Publicize vacancies using avenues that reach passive as well as active job seekers.

## Onboarding

- Before the first day, contact the new employee to welcome them and let them know what to expect.
- Appoint an “onboarding buddy” to support new hires during the early days.
- Develop a detailed plan for the first few weeks on the job.

## Learning & Development

- Find creative ways to help employees build knowledge and skills, including things like on-the-job experiences, coaching, and mentoring.
- Provide regular feedback to shape behavior and recognize performance.
- Reinforce formal learning to help employees use what they’ve learned.

## Engagement & Retention

- Find ways to help each individual tap into their own values and priorities through the work they do.
- Create a culture of information sharing and transparency where questions and suggestions are welcome.
- Use stay interviews as a tool for strengthening engagement.

## Succession Planning

Succession planning is a process for ensuring continuity in critical roles. It involves identifying future staffing needs and taking action to ensure these needs are met.

- Involve current Flex staff in the succession planning process.
- Consider cross-training staff through classroom learning, job shadowing or other experiences.
- Build an external pipeline by communicating regularly about Flex Program priorities and activities.

By following the relevant and practical recommendations in this guide, state Flex Programs can strengthen staff engagement and retention – thus ensuring continuity of the critical programs they provide to support rural health.

## Introduction and Purpose

Turnover of key state Flex Program staff has been a problem since the inception of the Medicare Rural Hospital Flexibility (Flex) Program. Given the increasing complexity of health care and the many dimensions of the Flex Program, there is a steep and time-consuming learning curve for new Flex Program staff. The time and resources required to build skills and master the Flex Program's [Core Competencies](#) represent a significant investment by each state Flex Program, as well as by the technical assistance providers and the Federal Office of Rural Health Policy (FORHP). As staff turnover occurs, the continuity of the program suffers, work timelines are disrupted, funding goes unspent, and planned support for rural hospitals, clinics and communities is not realized.

*The sustainability of key staff requires a multi-faceted approach, beginning with the creation of a systematic process of recruiting, onboarding, developing, retaining and succession planning.*

Workforce continuity, in general, has recently become a nationwide problem, and recruitment and retention of employees has emerged as a high priority. The sustainability of key staff requires a multi-faceted approach, beginning with the creation of a systematic process of recruiting, onboarding, developing, retaining and succession planning. This guide lays out a series of recommendations and resources for each of these key workforce components. It also suggests a comprehensive process for achieving staff sustainability in the state Flex Program. While designed primarily for the leaders of State Offices of Rural Health (SORH) and state Flex Programs, the concepts are universal, and have applications for rural hospitals and clinics as well. In short, this guide is designed to help state Flex Programs recruit good Flex Program staff, train them successfully, retain them longer, and then plan an orderly process of finding and training new staff before the outgoing staff leave.

# The Staff Sustainability Cycle

The Staff Sustainability Cycle is a process for improving retention of high-performing Flex Program staff – and as a result, strengthening continuity of support for rural hospitals and clinics in your state. As the name implies, the cycle is continuous. It requires consistent attention and action to maximize its effectiveness. Five components make up the Staff Sustainability Cycle, with each component playing a key role in staff sustainability. This guide outlines specific strategies for addressing each component of the cycle.



**Recruiting:** Identifying and soliciting individuals – either from within or outside an organization – to fill job vacancies or staff for growth.<sup>1</sup>

**Onboarding:** A process of bringing a new employee into the organization.

**Learning & Development:** Empowering employees' growth and developing their knowledge, skills, and capabilities to drive better business performance.<sup>2</sup>

**Engagement & Retention:** The extent to which employees are passionate about their work and committed to the organization (engagement) and the choice by an employee to stay with an organization instead of seeking employment elsewhere (retention).

**Succession Planning:** A process for ensuring continuity in critical roles. It involves identifying future staffing needs and taking action to ensure these needs are met.

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<sup>1</sup> Society for Human Resources. (2019, November). *Recruiting Internally and Externally*. Retrieved August 2022, from <https://shrm.org/ResourcesAndTools/tools-and-samples/toolkits/Pages/recruitinginternallyandexternally.aspx>

<sup>2</sup> Association for Talent Development. (2019). *What Is Learning and Development?* Retrieved August 2022, from <https://www.td.org/talent-development-glossary-terms/what-is-learning-and-development>

# Recruiting

## What is it?



The Society for Human Resource Management defines recruitment as “the activity of identifying and soliciting individuals – either from within or outside an organization – to fill job vacancies or staff for growth.”<sup>3</sup>

The recruiting process is made up of three phases:

- 1. Planning**
  - Identify job requirements and characteristics of successful candidates
  - Involve others in the process
  - Develop a hiring timeline
- 2. Candidate communication and marketing**
  - Solicit candidates through internal and external job postings, referrals, and advertising
- 3. Selection and negotiation**
  - Evaluate candidates
  - Conduct interviews
  - Make a job offer and negotiate as needed

*Organizations who carefully consider what candidates are looking for have an advantage over those who stick with the status quo.*

Actions taken during each phase of the process determine the quality of hire (the value of the contributions a new hire brings to the organization) and ultimately the selected candidate’s longevity in the role.

## Best Practices in Recruiting

The recruiting environment has changed significantly over the past several years. Workforce shortages have left employers competing for qualified candidates, with the balance of power shifting in favor of job seekers. Hiring organizations who carefully consider what candidates are looking for, both from the

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<sup>3</sup> Society for Human Resources. (2019, November). *Recruiting Internally and Externally*. Retrieved August 2022, from <https://shrm.org/ResourcesAndTools/tools-and-samples/toolkits/Pages/recruitinginternallyandexternally.aspx>

job and from the recruiting process itself, have an advantage over those who stick with the status quo. The competitive environment does not mean that you should expect to settle for less-qualified candidates, however. It's important to start with retention in mind and stay focused on long-term success throughout the process. Here are some strategies for maximizing the odds of selecting the best-fit candidate during each stage of recruiting.

## Planning

### Identifying job requirements and characteristics of successful candidates

In today's market, many employers are looking carefully at job requirements to be sure they truly predict success in a given job and open opportunities to as wide a variety of candidates as possible. A job opening provides the perfect opportunity to review the position description to be sure it accurately reflects the requirements of the job now and in the near future.

- Look forward, not backward. What environment will Flex Program staff be working in 1-3 years from now, and what will the job entail as a result? Identify the accomplishments, skills, and knowledge truly required to be successful over the next 1-3 years. Consider, for example, what employees will need to know about telehealth and the transition to value over the next few years.
- Many employers have been taking a second look at whether a 4-year degree is truly necessary for a given job, or if skills and experience are what's most important. In many circumstances where degrees have been found to be unnecessary, larger, and more diverse pools of applicants have resulted.
- Think carefully about required qualifications. Distinguish between what employees need to know on their first day and what can be taught over time.
- Work closely with your organization's Human Resources (HR) department throughout this process to be sure that internal processes are being followed and that you understand the implications of any changes to the job description and qualifications.



- Seek input from your organization’s Diversity, Equity, and Inclusion experts to ensure that your recruiting practices emphasize equity and inclusion and are designed to reach as diverse a pool of candidates as possible.

### **Involving others in the process**

Whether or not your organization’s hiring practices involve formal hiring teams made up of peers, managers, and other involved staff, it’s important to involve others in the process.

- Gather input from others as you develop the job description and identify qualifications.
  - Consult others inside your organization. Incumbents, in particular, can be the best sources of information about the true experience of the job and what’s needed to be successful in the role.
  - Connect with those outside your organization as well, including representatives of rural hospitals served by your state Flex Program. You might also consider reaching out to other states’ Flex Programs to ask about their job descriptions and qualifications.
- If your organization’s policies support it, form and convene an interview team to start the planning process. Having a diverse interview panel can reduce bias and help see candidates from different perspectives.

### **Developing a hiring timeline**

In a competitive hiring environment, lengthy hiring process can result in the loss of a good candidate. While public sector hiring can sometimes take longer than in a private company, thoughtful planning can help minimize delays.

- Create a timeline that keeps the process moving forward while accounting for all steps in the process required by your organization.
- As soon as you have your timeline laid out, block time on the hiring team’s calendars for reviewing applications, participating in interviews, and making the final decision.

- Create a project plan of sorts for yourself so that you can stay on top of steps in the process and proactively address challenges as needed.

## Candidate Communication and Marketing

Use a wide variety of sources to publicize the job opening.

To maximize visibility, target not just active job seekers (those who are actively looking for a job) but also passive job seekers (those who are not actively looking for a new job but potentially open to the right opportunity).

- Use job boards that attract diverse talent such as diversity.com, Fairygodboss, and Pink Jobs.
- Sources for reaching active job seekers include your organization’s website, job boards, and other hiring sites.
- Sources for reaching both active and passive seekers include social media and referrals. Referrals may come from inside or outside your organization, including the hospitals you work with.
- Check with your HR department for guidance on referrals. While many public sector entities prohibit coaching job candidates, most do support communicating with potential candidates about the position and the timeline for hiring.
- When crafting a job posting, emphasize qualities that are important to candidates.

## Recruiting for Flex Program Sustainability

- Seek to hire those who are personally flexible, intellectually curious, and comfortable with uncertainty and a steep learning curve. Other characteristics of those who have been successful in Flex roles include strong communication skills and comfort meeting new people.
- Look for candidates who have experience working with hospitals, clinics, or other rural health organizations. Having lived in a rural area is also a plus.
- During the interview process, be sure that candidates understand the “why” of the Flex Program. Emphasize the special nature of working in rural health as well as the mission orientation and non-competitive nature of the work.

- In a 2022 study, Gallup found that job seekers in the U.S. placed the highest importance on these characteristics when deciding whether a job was right for them:<sup>4</sup>
  - The ability to use their strengths on the job
  - Stability and job security
  - A culture valuing diversity and inclusion
  - Work-life balance and wellbeing
  - Pay and benefits
  - Additional studies have found that younger candidates in particular are attracted to jobs that provide opportunities to grow and develop in their role and make a difference to others.<sup>5</sup>



86% of candidates worldwide say that inclusion in the workplace is important.<sup>5</sup>

## Selection and Negotiation

- Be sure all interviewees know the hiring process and timeline: How many rounds of interviews they can expect, when decisions will be made, and when they can expect to hear back. If delays occur, reach out to candidates to let them know there has been a delay and when they can expect to hear back.
- During the interview, provide a clear picture of what it's like to be in the role.
- If possible, include a current or former staff member on the interview team so they can provide a first-hand account. Be as transparent as possible about the challenges and the rewards they might expect.
- Share information about the things that tend to be important to candidates such as pay range, work-life balance, flexibility, and opportunities to grow and develop.

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<sup>4</sup> Wigert, B. (2022, February). *The Top 6 Things Employees Want in Their Next Job*. Gallup.com. Retrieved August 2022, from <https://www.gallup.com/workplace/389807/top-things-employees-next-job.aspx>

<sup>5</sup> Houle, S., & Campbell, K. (2022, June). *What High-Quality Job Candidates Look for in a Company*. Gallup.com. Retrieved August 2022, from <https://www.gallup.com/workplace/236492/high-quality-job-candidates-look-company.aspx>

- Work with your HR department to identify any potential flexibilities in negotiation. For example: Salary may be non-negotiable, but is there any flexibility in scheduling? Can employees work remotely all or some of the time, or flex their start and end times?

## Recruiting Tools

1. [Hiring timeline template](#)
2. [Flex for success template](#)



## KEY TAKEAWAYS

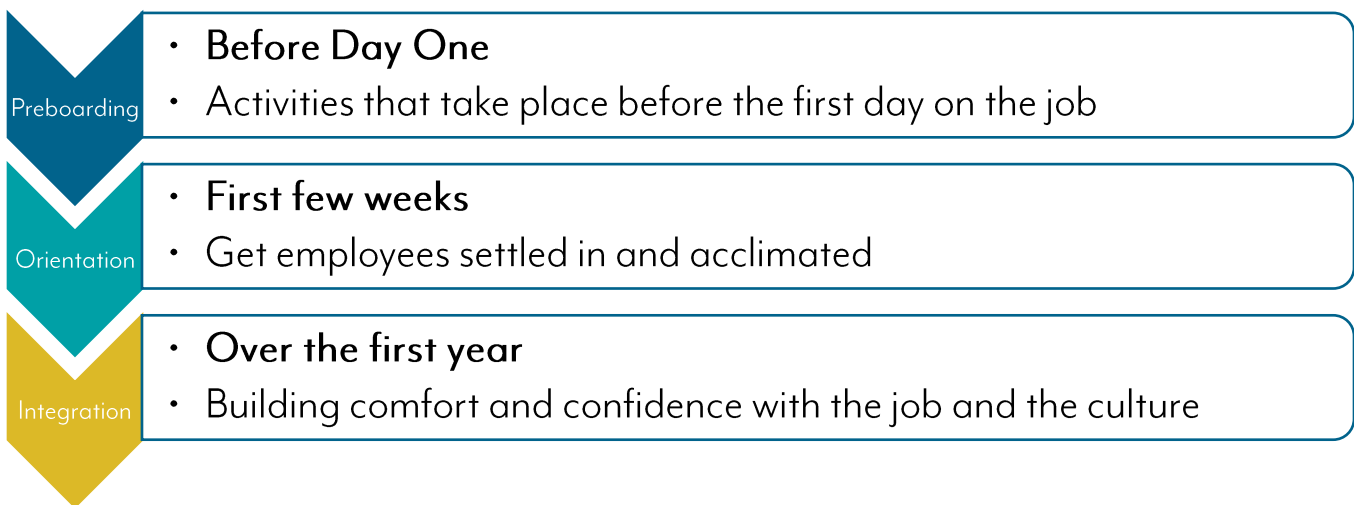
- Start with retention in mind.
- Stiff competition for qualified candidates means that employers must carefully consider the candidate's perspective during every step in the recruiting process.
- Consider the *future* vision for the job, not just what it has looked like in the past.
- Think carefully about job requirements. Consider prioritizing skills and experience over formal education where appropriate.
- Time is of the essence. Plan ahead to make the process as streamlined as possible.
- Publicize the vacancy using avenues that reach passive as well as active job seekers.
- During the interview process, be as transparent as possible so candidates know what they can expect from the job – the challenges as well as the rewards.

# Onboarding

## What is it?



Onboarding is the process of bringing a new employee into an organization. The onboarding process involves administrative tasks like filling out forms and signing up for benefits, as well as activities to welcome the employee and introduce them to the organization’s culture. We can think about onboarding in three phases:



Just as in the recruiting stage, actions taken during onboarding have a significant impact on a employees’ longevity in their role. A 2021 Gallup study found that employees who report “exceptional” onboarding experiences are 2.6 times as likely to feel high satisfaction in their jobs – and as a result are far more likely to stay.<sup>6</sup>

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<sup>6</sup> Wetherell, E., & Nelson, B. (2022, May). *Eight Practical Tips For Leaders For A Better Onboarding Process*. Gallup.com. Retrieved August 2022, from <https://www.gallup.com/workplace/353096/practical-tips-leaders-better-onboarding-process.aspx>

## Best Practices in Onboarding

The onboarding process should be designed to set your new Flex Program staff up for success and help them become comfortable in their roles as quickly as possible.

### Preboarding

- As you plan the onboarding process, consider asking recent hires to share their experiences. Ask about the parts of the process that were most valuable to them and any recommendations they have for improvement.
- As soon as possible after the job offer is accepted, email the employee welcoming them to the team. Share an itinerary for their first few days and any additional information they need to get off to a good start (parking details, meeting location, etc.). Let them know whom they should contact with questions.
- Appoint an “onboarding buddy” – someone who is not the new employee’s manager and who can help them get acclimated, answer questions, and introduce them to others. Ask the onboarding buddy to send an introductory welcome email as well.
- Send a welcome package to the new employee’s home. You might include small gifts such as a branded mug or t-shirt along with a card signed by other members of the team. Sending e-cards signed by the team works great for those working in remote environments.
- Prepare a welcoming workspace for the employee. Ensure that any needed accommodations are available. Do what you can to ensure that all technology will be available as soon as the employee is ready to use it. If this is a concern, develop a backup plan so that the new employee has something to do while any technology hiccups are sorted out.
- Have a learning plan for the first 30, 60, and 90 days ready to go on the first day.

## Orientation

- Plan the first few days carefully and share the plan with the new employee. Break learning into manageable chunks by incorporating time for individual work and reflection into the workday. Build in time for the new employee to meet with their onboarding buddy to touch base and ask questions.
- Review job responsibilities in detail. Share information about the available resources that will help them be successful in their jobs.
- Emphasize the big picture as well as the details. Be sure the new employee has a clear understanding of the impact they have on the success of the rural health care system in your state.
- Help the employee learn about the organization as well as their role. Sharing organizational charts and introducing them to people on other teams can help them understand the big picture and where they fit in.
- During the first few days, assign a few small tasks. This will help the employee acclimate and begin to feel productive early on. Stay available for questions as they arise.

## Onboarding for Flex Program Sustainability

Each fall and spring the National Rural Health Resource Center holds a Flex Program Workshop. The goals of this multi-day event include:

- Provide an orientation and basic education about every major aspect of the Flex Program.
- Give new Flex staff the opportunity to meet and get to know
  - Flex staff from other states, so that they can discuss issues and support each other after the workshop.
  - Staff of the Technical Assistance and Services Center (TASC) and feel comfortable requesting TA and information when needed.

TASC staff follow up with attendees after the event and periodically during the ensuing six-month period. New Flex Coordinators and Directors should sign up for the Flex Workshop as early in their employment as possible so they that can obtain education and support in the important onboarding phase.

- Check in frequently with the employee. During the first few weeks, a daily check-in is especially important. As they become acclimated, these meetings can be spaced further apart.
- Encourage other staff to reach out to the new employee to welcome them to the team. Consider an all-office meet-and-greet or coffee chat. This is an informal way for the full team or office to pop in and say hello. This can be offered via a virtual meeting space.
- Share information about workplace norms and other cultural elements. For example, do internal staff communicate most often in person? Via chat? Email? Is there a strict expectation for meetings to start and end on time, or are these considered flexible?
- If the new employee will be working remotely, it's even more important to be especially vigilant about communicating and connecting. Set up time not just for talking about work, but also for helping them get to know you and others on a personal level. Consider scheduling virtual coffee hours or lunches with different staff members during the first few weeks.

## Integration

- As the new employee becomes more comfortable in their role, continue to help them learn by broadening their view of organization and the rural health system. Set up meeting for the employee to learn about other related programs that are not part of their job responsibilities, such as Small Rural Hospital Improvement Grant Program (SHIP), SORH, Primary Care Office (PCO), etc.
- Get them involved in their own development. Ask what knowledge, skills, or resources would help them be more effective in their role.
- Identify at least one milestone worthy of celebration. You might schedule a virtual or in-person gathering to recognize the new employee's 6-month anniversary, their first onsite visit to a hospital or clinic, or the successful completion of their first big project.
- See more tips related to Learning & Development and Employee Engagement in the next two sections of this guide.



## Onboarding Tools

1. [Onboarding checklist](#)
2. [“Get to know you” discussion questions](#)



### KEY TAKEAWAYS

- Before their first day, connect with the employee to welcome them and help them know what they can expect during the orientation process.
- Appoint an “onboarding buddy”.
- Develop a detailed plan for the first few weeks on the job. Share this plan with the new employee.
- Avoid information overload during the early days by interspersing learning with reflection and work time.
- Check in frequently.
- Help new employees get to know others personally as well as professionally.

# Learning & Development

## What is it?



*While formal learning certainly plays a part in employee learning, there are many other avenues for building employee knowledge, skills, and capabilities.*

The Association for Talent Development defines learning and development as “empowering employees’ growth and developing their knowledge, skills, and capabilities to drive better business performance.”<sup>7</sup> Multiple benefits result when employees have opportunities to grow and develop. Not only do they become more effective in their role, but the Flex Program as a whole strengthens its culture of learning and becomes better positioned to provide support to rural providers and communities. Perhaps most importantly, development is a key contributor to employee engagement. Engagement brings multiple benefits to individuals, teams, organizations, and interested parties (see the Engagement section of this guide for details). While formal learning certainly plays a part in employee learning, there are many other avenues for building employee knowledge, skills, and capabilities. **Some studies estimate that only 10 percent of professional learning comes from formal learning, while 20 percent results from interactions with others, and the majority, 70 percent, arises from on-the-job experiences.**<sup>8</sup> Learning plans should be tailored to employees’ preferred learning styles with the goal of creating inclusive and equitable experiences for each learner.

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<sup>7</sup> Association for Talent Development. (2019). *What Is Learning and Development?* Retrieved August 2022, from <https://www.td.org/talent-development-glossary-terms/what-is-learning-and-development>

<sup>8</sup> Effron, M. (2019, January). *A Simple Way To Map Out Your Career Ambitions*. Retrieved August 2022, from <https://hbr.org/2018/11/a-simple-way-to-map-out-your-career-ambitions>

# Best Practices in Learning and Development

## On-the-job experiences

- **Experiential learning**, or learning by doing, is most effective when paired with preparation ahead of time and reflection afterward. If, for example, a Flex staff member is preparing for their first site visit to a rural hospital, you might spend some time beforehand helping them know what to expect and clarifying goals for their visit. After the visit, you might help them reflect on the experience by asking what went well, what they learned, and what they might do differently next time.
- Seek virtual options when in-person experiences may not be feasible.
- **Stretch assignments** are short-term projects or experiences that allow employees to explore the world beyond their current responsibilities. Stretch assignments should be challenging enough to push the employee beyond their comfort zone but not so far beyond their skills that they become overwhelmed. Stretch assignments should always be accompanied by support from others.
- **Job shadowing** involves spending time with one or more people as they perform their work. Job shadowing can take place internally (inside the Flex Program organization) to provide a deeper understanding of other functions, or externally (in a rural hospital or clinic) to provide insight into rural health professional experiences.

## Interactions with others

- Coaching can be done by an employee's direct supervisor or by others who have the right expertise. The goal of coaching is not to give the right answers, but instead to help them build their critical thinking, problem solving skills, confidence, and independence. Coaching is best suited to situations where an employee has the ability to address the issue at hand but may not have the confidence or motivation to handle it themselves (see the Coaching Conversation Planner in the Appendix for more information).

- While it's always important for managers to provide regular **feedback** to their employees, it's even more critical when someone is new to a job. Feedback shapes behavior, builds trust, increases self-awareness, and supports achievement of goals (see the Feedback Planning Template in the Appendix for more information).
- A **mentor** - someone other than the employee's manager – can have a powerful influence on development. Encourage employees to identify someone inside or outside the organization that they admire and who might be willing and able to provide guidance that helps them reach their goals.
- **Teaching others** can serve as a valuable learning opportunity – not just for the learner but also for the teacher. As leadership expert John C. Maxwell says, “You never really know something until you teach it to someone else.”

## Formal Learning

- Formal learning, or structured training, can be a good option to help employees gain specialized knowledge that can then be applied on the job. It can also be used to help employees develop the knowledge needed to help them achieve their career goals.

## Learning & Development for Flex Program Sustainability

Christina Campos, CEO of Guadalupe County Hospital, a Critical Access Hospital in New Mexico, advocates for assembling cohorts of professionals on topics of importance to them as a valuable strategy for learning and development. She has learned that employees often learn best from each other, and the ability to share experiences, challenges, and lessons learned is an important activity for both retention and development.

To utilize this cohort concept, Flex Coordinators might reach out to a small group of other state Flex Coordinators, perhaps with similar interests and/or program longevity, form an informal cohort, and develop a regular meeting schedule for this small group. To ensure maximum value and impact, agendas should be developed in advance for each meeting and a regular time for the meetings should be scheduled on participants' calendars. TASC can aid you in identifying other states that may be a good connection.

- Formal learning comes in many forms such as in-person workshops, asynchronous or synchronous virtual learning events, and conferences.
- Many participants in formal learning also experience a side benefit: Networking and building relationships with people who have similar interests and areas of expertise.
- Research shows that formal learning “sticks” best when reinforced back on the job.<sup>9</sup> When managers ask learners about their big takeaways and how they plan to use what they learned during formal learning, retention of learning increases.

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<sup>9</sup>Michels et al., (2021, August). *Three Steps To Make Training Stick*. Retrieved August 2022, from <https://www.bain.com/insights/three-steps-to-make-training-stick/>

## Learning & Development Tools

1. [Learning plan template](#)
2. [Coaching conversation planner](#)
3. [Feedback planning template](#)



### KEY TAKEAWAYS

- Find creative ways to help employees build knowledge and skills. Formal learning is only one option among many when it comes to employee development.
- On-the-job experiences can provide valuable learning opportunities when paired with support from others.
- While regular feedback is always important, it's especially critical for those new to a job.
- New perspectives can be gained through coaching and mentoring relationships.
- Formal learning often provides networking opportunities in addition to learning. Managers can reinforce formal learning on the job.

# Engagement & Retention



## What is it?

Gartner defines employee engagement as “the extent to which employees are passionate about their jobs, are committed to the organization, and put discretionary effort into their work.”<sup>10</sup> Retention occurs when employees choose to stay with an organization instead of seeking employment elsewhere.

Research shows that when employees are engaged, organizations experience these outcomes:

- Lower absenteeism
- Higher retention
- Positive workplace climate
- Stronger work relationships
- Higher quality
- Higher productivity
- Higher customer satisfaction
- Stronger financial performance

One model of employee engagement developed by William Macey, Benjamin Schneider, Karen Barbera, and Scott Young outlines four primary factors that contribute to employee engagement.<sup>11</sup> While organization-wide culture, policies, and practices certainly impact engagement, studies show that an employee’s immediate supervisor has the single strongest influence on their level of engagement.

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<sup>10</sup> Gartner, Information Technology (IT) Glossary. Retrieved August 2022, from <https://www.gartner.com/en/information-technology/glossary>

<sup>11</sup> Macey, et al., (2009). *Employee Engagement Tools For Analysis, Practice, and Competitive Advantage*. Wiley-Blackwell.

# Best Practices in Engagement and Retention

## Salary and benefits: The starting point

- While satisfaction with salary and benefits does not by itself create engagement, it is considered a “dissatisfier” that can impact recruitment and retention.
- Strategies for addressing Salary and Benefits include:
  - Learn about your organization’s practices for benchmarking salaries and benefits against peer organizations.
  - Check in periodically with your HR department to ensure that salaries and benefits offered to Flex Program staff are competitive in your market.



## Capacity to engage: Having needed resources

- In this context, “resources” cover a broad range, including not only finances, materials, and equipment, but also knowledge, information, time, and social support.
- Strategies for strengthening Capacity to Engage include:



- Have regular conversations with Flex program staff to ensure they have the resources they need to do their job well.
- Review workloads to ensure that employees have sufficient time to do their job well.
- Check in and share information on a regular basis.
- Help employees build relationships with others inside and outside the organization.
- Provide Flex Program staff with opportunities to learn and practice new skills in a supportive environment.

## Motivation to engage: Finding meaning in the work

- Factors that contribute to a sense of meaning include challenge, variety, autonomy, and regular feedback, as well as work that is aligned with an employee’s values.
- Strategies for strengthening Motivation to Engage include:
- Learn about what’s important to each individual and help them find ways to tap into their values through their work.
  - Help employees use their skills to the fullest by providing them with appropriate levels of work challenge, variety, and autonomy.
  - Communicate in ways that connect an individual’s work to the impact they have on rural people and communities.
  - Provide opportunities for Flex Program staff to visit rural hospitals and clinics to see the impact that they have on rural communities.

### Engagement & Retention for Flex Program Sustainability

The multiple demands of leading a state Flex program can make it hard to prioritize taking time to connect with employees. Efforts to do so, however, can pay off significantly in the long run. As Quint Studer says in *The Busy Leader’s Handbook*:

“Few things matter more than connecting with employees, but we often get caught up in day-to-day work. When we make a sincere effort to find out how they’re doing, and take action from what we learn, people will be more likely to stay with us for the long term.”

- Place a high priority on employee learning and development. Delegate, coach, provide stretch assignments and formal learning opportunities to help them continually develop in their role and prepare them for the next step in their career. See the Learning & Development section above for more details.
- Provide regular feedback to recognize good performance and redirect unproductive behavior.

### **Freedom to engage: Feeling that engagement is safe and worthwhile.**

- When employees feel free to engage, they feel safe asking questions and speaking up – and confident that if they do speak up, their perspective is welcomed.
- Strategies for strengthening Freedom to Engage include:
  - Encourage employees to ask questions and speak up when they disagree or aren't sure about something.
  - Treat mistakes as learning opportunities rather than failures.
  - Create a culture of transparency and information sharing.
  - Provide employees with opportunities to give input into program decision making.
  - Manage conflict honestly and constructively.

### **Strategic engagement: Aligning energy and effort with the organization's goals**

- Strategic engagement occurs when employees understand how their daily work contributes to the mission and long-term goals of the organization.
- Strategies for improving strategic engagement include:
  - Ensure that Flex Program staff understand the long-term goals of your organization and how they contribute to them.
  - Build employees' awareness of the rural health care environment, the transition to value, and current regulatory and programmatic trends.

- Emphasize the connection between daily work and long-term goals during feedback discussions.

## **Stay interviews: A valuable tool for improving retention and employee engagement**

Often when an employee quits their job, the employer conducts an exit interview to learn the reasons for their departure. While this information can help the employer learn why employees leave and what they might do in the future to improve retention, by the time an exit interview occurs, the employee is already on their way out the door.

A stay interview, in contrast, is a tool for preventing turnover from occurring in the first place. It is a proactive process for discovering the aspects of a job that the employee currently finds rewarding and identifying ways to improve their work experience.

When it comes to employee engagement, insights gained from a stay interview can help employers identify specific ways to support and strengthen the engagement of individual employees. Check with your HR department to find out whether your organization has a process for conducting stay interviews. If not, see the Resource Guide for a planning tool to help you conduct one.

# Engagement & Retention Tools

1. [Stay interview template](#)
2. [Feedback planning template](#)



## KEY TAKEAWAYS

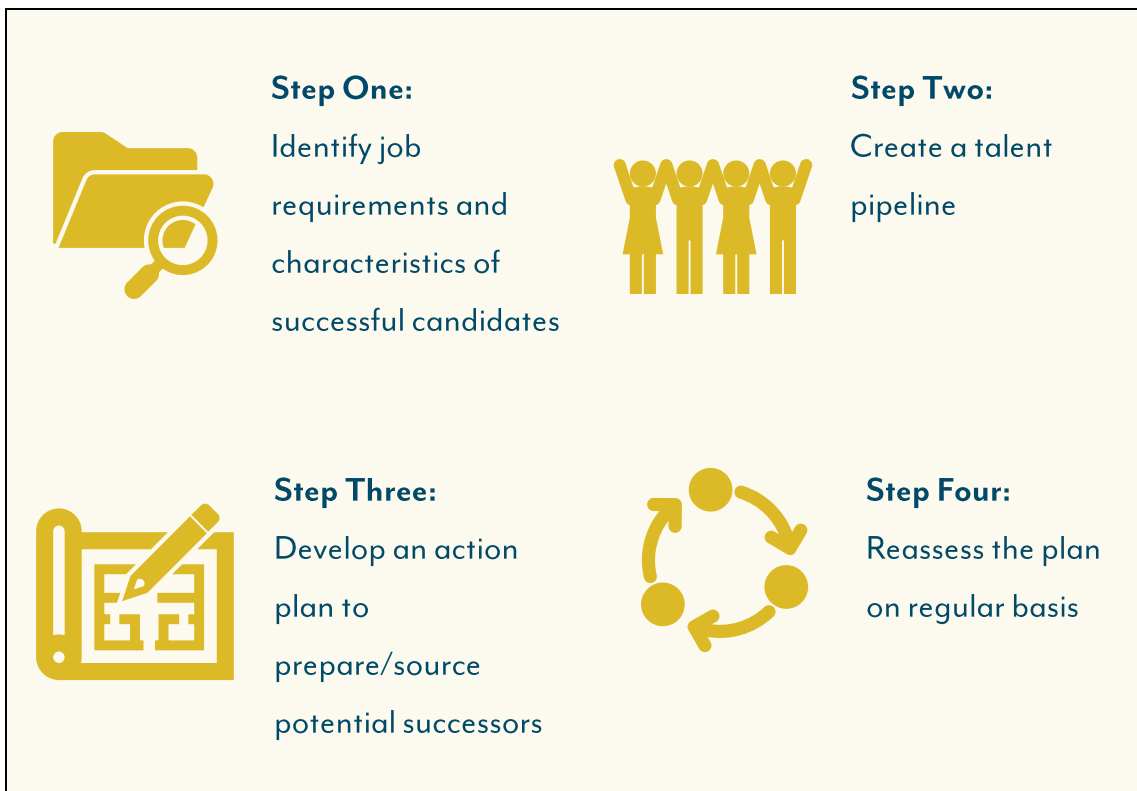
- Work with your HR department to ensure that Flex Program salaries and benefits remain competitive.
- Check in regularly with employees to ensure they have the resources they need to do their job well.
- Find ways to help each individual tap into their own values and priorities through the work they do.
- Create a culture of information sharing and transparency where questions and suggestions are welcomed.
- Ensure that Flex staff understand how their daily work contributes to long-term goals.
- Consider conducting stay interviews as a tool for strengthening engagement.

# Succession Planning

## What is it?



Succession planning is a process for ensuring continuity in critical roles. It involves identifying future staffing needs and proactively taking action to ensure these needs are met. “Taking action” may involve developing the knowledge and skills of internal staff who can take over the role when a vacancy becomes available or proactively identifying a pool of potential internal or external candidates who may be able to fill the role in the future. When succession planning is done well, recruiting is much easier and results in better hiring outcomes - because much of the important groundwork is already in place. Steps in the succession planning process include:



# Best Practices in Succession Planning

## Identifying job requirements and characteristics of successful candidates

- Look forward, not backward. What environment will Flex Program staff be working in 1-3 years from now, and what will the job entail as a result? Identify the accomplishments, skills and knowledge truly required to be successful over the next 1-3 years.
- Many employers have been taking a second look at whether a 4-year degree is truly necessary for a given job, or if skills and experience are what's most important. In many circumstances where degrees have been found to be unnecessary, larger, and more diverse pools of applicants have resulted.
- Think carefully about required qualifications. Distinguish between what new employees need to know on their first day and what can be taught over time.
- Get input from the incumbent as well, as they have the most realistic picture of the requirements of the job. Reaffirm that succession planning is not only important for ensuring continuity for rural hospitals in your state – it's an essential part of employee development and career planning as well. If you successfully help your current employees grow and develop, they will likely eventually transition into another role. Succession planning makes this transition as seamless as possible.

### Succession Planning for Flex Program Sustainability

- If possible, hire new Flex Program staff weeks or even months before the previous employee leaves, so that the departing person has time to orient the new hire and make a “warm handoff” by introducing them to people from rural hospitals and clinics they'll be supporting.
- During a departing employee's last few weeks on the job, they should spend a large proportion of their time ensuring that all documentation of processes, workflows, and project statuses is up to date and readily available to the incoming Flex Program staff member.

## Creating a talent pipeline

- Identify people inside and outside your organization that could potentially be a good fit for a Flex Program role. Consider also including internal staff who may be able to step into the role on a temporary basis in the event of an unexpected vacancy.
- Ask others inside and outside your organization for recommendations.
- As you communicate with others, be upfront about the purpose of these activities. Explain the role that succession planning plays in long-term career planning and development for current Flex staff, and that the current employees do not have plans to leave the organization.

## Developing an action plan to prepare/source potential successors

- Talk to other leaders in your organization about the importance of succession planning. Make a plan together to support each other's succession planning activities.
- Familiarize internal staff with the responsibilities of Flex Program staff so that they can step in on a temporary basis as needed.

### Succession Planning for Flex Program Sustainability

- SHIP Coordinators may be good candidates for cross-training in the Flex Program so that they can be of help during staff transition periods.
- Excellent examples of succession planning can be seen in SORH and state Flex Programs in Michigan and Pennsylvania.
  - John Barnas, Director of the Michigan Center for Rural Health, opted to spend a year transitioning into retirement. During that time, his successor Crystal Barter learned from John as she grew into the Director role.
  - In Pennsylvania's Office of Rural Health, departing Flex Coordinator Jen Edwards gave Lisa Davis, Director, enough notice to allow a new Flex Coordinator to come on board and learn from Jen during the transition.

- Make it a practice to cross-train employees in your department or across departments in collaboration with other leaders. Cross-training may involve classroom-style learning, job shadowing, or on-the-job experiences.
- Provide all employees with an opportunity to learn about each other's jobs and how they all contribute to the overall goals of the department/agency.
- Follow the best practices outlined in the Learning & Development section of this guide to develop the internal staff skills and knowledge.
- Work with your agency's HR department to develop formal plans and systems for cross-training and succession planning.
- Ensure that day-to-day work processes are documented in such a way that new employees can perform the simple as well as the more complex job responsibilities as soon as possible.
- Keep external contacts informed about activities being performed by the state Flex Program.

## Re-assessing the plan

- Review your succession plan annually at a minimum. Evaluate Flex staff job descriptions and qualifications to be sure they accurately reflect the requirements of the job.
- Adjust your pipeline and action plans accordingly.



## Succession Planning Tools

1. [Flex for success template](#)
2. [Pipeline identification worksheet](#)



### KEY TAKEAWAYS

- Succession planning is not only important for ensuring Flex Program continuity – it’s an essential part of employee development and career planning.
- Incumbent Flex staff play an integral role in succession planning.
- Collaborate with others to support succession planning across your organization.
- Consider cross-training internal staff through classroom learning, job shadowing, or other on-the-job experiences.
- Nurture your external pipeline through regular communication about Flex Program priorities and activities.

# Conclusion

One of the most important features of any good organization is continuity of staffing. Staff turnover leads to recruitment and training expenses, workflow, and project disruptions, and often reduction in production and services. Quality may also be negatively affected.

The Flex Program, as administered by FORHP, has provided important funding to state departments of health, universities, and independent non-profit organizations to support Critical Access Hospitals and Rural Health Clinics in 45 states. Many state Flex Programs, however, have historically suffered from frequent staff turnover, and, as a result, have experienced many of the problems cited above. This guide is designed to address Flex staff turnover, and to increase the level of staff sustainability in the state Flex Programs. It provides a framework for a multi-faceted, strategic approach to recruiting and retaining Flex staff, and suggests relevant and practical action steps to achieve these goals.

*“Few things matter more than connecting with employees, but we often get caught up in day-to-day work. When we make a sincere effort to find out how they’re doing, and take action from what we learn, people will be more likely to stay with us for the long term.”<sup>12</sup>*

<sup>12</sup>Studer, Q. (2020). *The Busy Leader’s Handbook: How To Lead People and Places That Thrive*. Wiley.

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