Staff Sustainability Guide & Toolkit for Rural Health Care Organizations

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National Rural Health Resource Center

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Executive Summary

While rural health care organizations have always worked to minimize staff turnover, the current environment has made workforce sustainability a critical issue. The good news is that organizations of all sizes have a great number of tools at their disposal to maximize the sustainability of their existing workforce by optimizing processes, fostering cultures of enagement and learning, and thinking proactively about the future.

The **Staff Sustainability Cycle** is a process for improving retention and engagement of high-performing health care employees — and as a result, strengthening continuity of services supporting health in rural communities. The five components of the Staff Sustainability Cycle are outlined below, along with some key actions associated with each component.

Staff Sustainability Cycle: Recruiting, Onboarding, Learning & Development, Engagement & Retention and Succession Planning

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.

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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

- Involve current employees in the succession planning process.
- Consider cross-training staff through classroom learning, job shadowing, or other experiences.
- Nurture your external pipeline through regular communication.

By following the relevant and practical recommendations in this guide, rural health care organizations can strengthen staff engagement and retention — thus ensuring continuity of the critical services they provide in their communities.

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Introduction and Purpose

While rural health care organizations have always intended to avoid unnecessary staff turnover, the current environment has made workforce sustainability a critical issue.

Workforce shortages have led to escalating salaries and signficant competition for talent. Rural health care leaders can sometimes feel limited in their ability to compete with the resources available to larger hospitals and health care systems.

> *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.*

The good news is that even small organizations have a great number of tools at their disposal to maximize the sustainability of their existing workforce by optimizing processes, fostering cultures of enagement and learning, and thinking proactively about the future of their own workforce. 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 comprehensive process for maximizing staff sustainability in rural health care organizations. In short, this guide is designed to help rural health care organizations recruit qualified staff, train them successfully, retain them longer, and create a systematic process for finding and training new staff before outgoing staff leave.

Before implementing any of the best practices or tools included in this guide, please consult and work closely with your Human Resources department to ensure compliance with your organization's existing policies, practices, and labor contracts.

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The Staff Sustainability Cycle

The Staff Sustainability Cycle is a process for improving retention of high-performing health care staff — and as a result, strengthening continuity of care and improving health and wellness in rural communities. 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.

Staff Sustainability Cycle: Recruiting, Onboarding, Learning & Development, Engagement & Retention and Succession Planning

Recruiting: Identifying and soliciting individuals — either from within or outside the organization — to fill job vacancies or staff for growth.[1]

Onboarding: The 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.[2]

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[1] 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

[2] 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

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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.

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."[3]

The recruiting process is made up of three phases:

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

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

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[3] 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

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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 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 this person 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 population health and value-based care over the next few years.

- Many employers have been taking a second look at whether a degree is truly necessary for a given job, or if skills and experience are what's most important. In circumstances where degrees have been found to be unnecessary for a specific position (and of course when not legally required for licensure), larger and more diverse pools of applicants have resulted.

- Think carefully about other qualification requirements. 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 procedures are being followed and that you understand the implications of any changes to job descriptions 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.
  - Seek the perspectives of those outside your organization as well. Find out how similar positions have been posted and filled by other rural health care organizations and what expectations community partners may have of the person who fills the role.

- If your organization's policies support it, form and convene an interview team to start the planning process. Consider including community members and partners on the interview team. Having diverse perspectives represented on the team can reduce bias and provide a well-rounded assessment of candidates.

Developing a hiring timeline

In a competitive hiring environment, a lengthy hiring process can result in the loss of a good candidate. 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 are potentially open to the right opportunity).

- Use job boards that attract diverse talent such as diversity.com, Fairygodboss, and Pink-Jobs.

- Use sites that specifically target rural health professionals, such as 3RNet.com.

- Tap into sources for reaching active job seekers, including your organization's website, job boards, and other hiring sites.

- Reach both active and passive seekers through social media and referrals. Referrals may come from inside or outside your organization, including employees, community partners, and contacts outside your region.[4] (Check with your HR department for guidance on referrals to ensure that all policies are followed.)

- When crafting a job posting, emphasize qualities that are important to candidates. 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:[5]
    - The ability to use their strengths on the job
    - Stability and job security
    - A culture valuing diversity and inclusion
    - Work-life balance and well-being
    - Pay and benefits

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[4] 3RNet. (2023, March 7). Best practices for candidate referral programs. 3RNet. Retrieved June 2023. from https://www.3rnet.org/Resources/News-Announcements/best-practices-for-candidate-referral-programs

[5] 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

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o   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. [6]

86% of candidates worldwide say that inclusion in the workplace is important. [6]

[6] 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

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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 share a revised timeline.

- During the interview, provide a clear, honest 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 firsthand 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.

- Work with your HR department to identify any potential flexibilities in negotiation. For example: Salary may be non-negotiable, but is there any wiggle room on paid time off? Are there any opportunities for remote work or flexible scheduling?

Rural Health Care Recruiting in Action

Randy Stembridge, Human Resources Director at Grove Hill Memorial Hospital in Grove Hill, Alabama, offers the following suggestions for interviewing candidates:

- **Schedule plenty of time for each interview.** "People will tell you what you need to know if you give them enough time and the right prompts," says Stembridge.

- **Use behavioral interviewing techniques to maximize the odds of making the right hiring decision.** Ask interviewees to give examples of times when they have encountered specific situations, and listen for the STAR (situation, task, action, result) in their answer.

- **Because communication and collaboration are especially critical in rural health care, pay close attention to how each interviewee connects with interview team members.** Do they listen well? Do they clearly articulate their thoughts? Do they use language that the other person will understand?

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Recruiting Tools

1. Hiring timeline template
2. Environmental scan tool

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 and allowed by licensure requirements.

- Time is of the essence. Plan ahead to make the process as streamlined as possible.

- Publicize vacancies 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:

Preboarding

Just as in the recruiting stage, actions taken during onboarding have a significant impact on 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.[7]

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[7] 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

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Best Practices in Onboarding

The onboarding process should be designed to set new employees 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 elements of onboarding 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 community, the organization, their colleagues, and patients.

- Help the employee learn about the organization. Sharing organizational charts and introducing them to people on other teams can help deepen new employees' understanding of 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.

- Check in frequently with the employee. During the first few weeks, a daily check-in is especially important. As the employee becomes 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 "open house" style coffee chat or brown bag lunch. This provides an informal way for anyone in the organization to pop in and say hello.

Rural Health Care Onboarding in Action

To address high first-year turnover rates for new employees, Golden Valley Memorial Healthcare (GVMH) in Clinton, Missouri, instituted a robust and prescriptive process for onboarding new staff. The program used many of the best practices outlined here, starting at the point of employment acceptance and going through the first 90 days. Since program inception, first-year turnover at GVMH has dropped by 20 percent.

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- Share information about workplace norms and other cultural elements. For example, do internal staff communicate most often in person? Via email or chat? 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 find opportunities for them to get to know others outside their department. You might invite them to meetings where other departments will be represented, ask them to participate on a cross-functional project team, or encourage them to attend a social event that people from across the organization — or community — will attend.

- 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 an informal gathering to recognize the new employee's 6-month anniversary, learning a new procedure or process, or the successful achievement of a key goal.

- 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

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KEY TAKEAWAYS

- Before their first day, connect with new employees 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.

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Learning & Development
What is it?

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."[8] Multiple benefits result when employees have opportunities to grow and develop. Not only do they become more effective in their role, but the organization as a whole strengthens its culture of learning and becomes better positioned to provide quality care and services to patients. 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.

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.**[9] 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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[8] 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

[9] 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

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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 staff member is preparing for their first procedure with a patient, you might spend some time beforehand helping them know what to expect. After the procedure, you might help them reflect on the experience by asking what went well, what they learned, and what they might do differently next time.

- **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 your organization) to provide a deeper understanding of other functions, or externally (with community partner organizations, for example) to provide a broader view of professional experiences related to their own work.

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 employees 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 Resource Guide 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 the achievement of goals. (See the Feedback Planning Template in the Resource Guide 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, is most often used 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.

- 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.[10] When managers ask learners about their big takeaways and how they plan to use what they learned during formal learning, retention of learning increases.

Rural Health Care Learning & Development in Action

Formal learning doesn't have to involve expensive consultants or long-distance travel.

Because small hospitals often promote from within, employees with significant technical expertise in fields like radiology or accounting often find themselves in leadership roles — where an entirely new skillset is needed.

Sparta Community Hospital in Sparta, Illinois holds cohort-based programs to help leaders transition into their roles. Programs are led by an internal facilitator and center around the book *Hardwiring Excellence* by Quint Studer.

Before each session in the program, leaders read part of the book. They then come to the session prepared to discuss key concepts together and build relationships by sharing and learning with their peers.

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[10] 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.

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Engagement & Retention
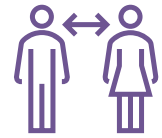
What is it?

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."[11] Retention occurs when employees choose to stay with an organization instead of seeking employment elsewhere.

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. 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: Capacity to Engage, Motivation to Engage, Freedom to Engage, and Strategic Engagement.[12]

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[11] Gartner, Information Technology (IT) *Glossary*. Retrieved August 2022, from https://www.gartner.com/en/information-technology/glossary

[12] Macey, et al., (2009). *Employee Engagement Tools For Analysis, Practice, and Competitive Advantage*. Wiley-Blackwell.

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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 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 staff to ensure they have the resources they need to do their job well.
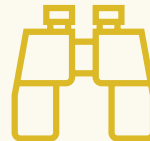

Primary Engagement Factors

Capacity to Engage

Having the resources you need

Motivation to Engage

Finding meaning in the work

Freedom to Engage

Feeling that engagement is safe and worthwhile

Strategic Engagement

Aligning efforts with organizational goals and strategies

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- 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 all 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 patients, colleagues, and the community — and seek opportunities for staff to see the impact for themselves.

- Place a high priority on employee learning and development. Delegate, coach, and 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.

> **Rural Health Care Engagement & Retention in Action**
>
> After recognizing the impact that a lack of available housing has had on recruitment and retention, Coteau des Prairies Health System in Sisseton, South Dakota decided to act. The hospital plans to purchase homes near the hospital and is also exploring the possibility of building a new housing complex.

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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 all 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 population health goals in your community.
- 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 employees currently find 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 salaries and benefits remain competitive.

- Check in regularly with employees to ensure they have the resources they need to do their job well.

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- 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 all staff understand how their daily work contributes to long-term goals.

- Consider conducting stay interviews as a tool for strengthening engagement.
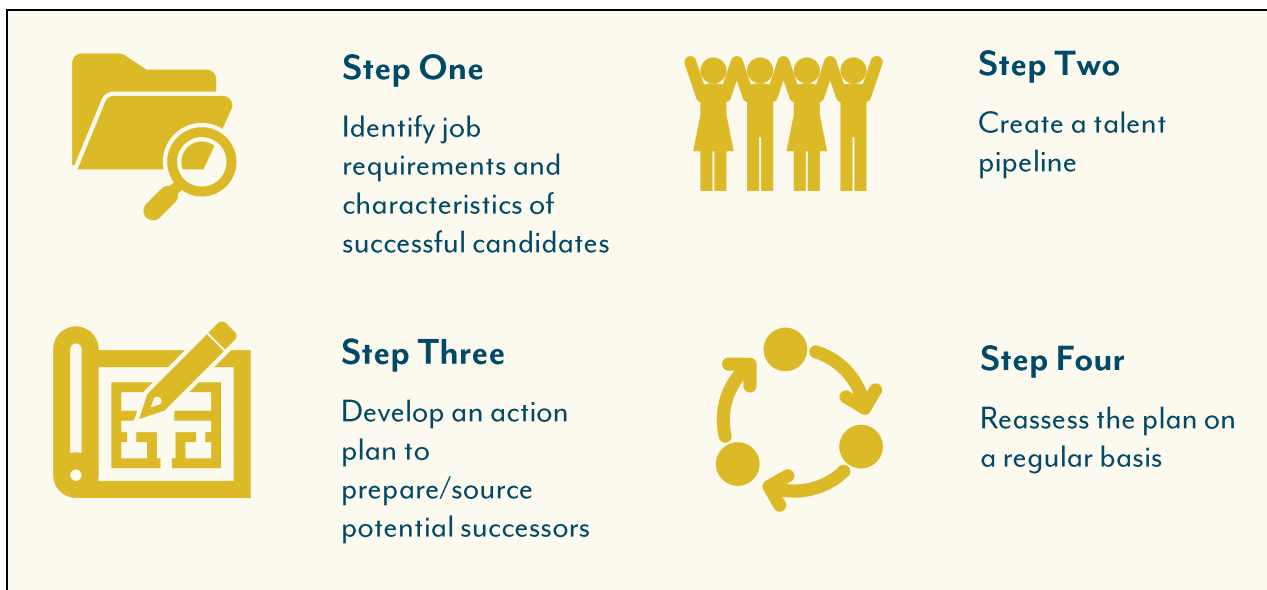
Succession Planning

What is it?

Succession planning is a process for ensuring continuity in critical roles. A role may be considered critical if it has a significant impact on the organization's mission and/or would be particularly difficult to fill if vacant. Examples of roles often considered critical in rural health care include senior leaders like CEO, CNO, CFO, and Nursing Home Administrator, specialized medical staff, and technical roles like Registered Nurse and Ultrasound Technologist.

Succession planning 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:

Step One

Identify job requirements and characteristics of successful candidates

Step Two

Create a talent pipeline

Step Three

Develop an action plan to prepare/source potential successors

Step Four

Reassess the plan on a regular basis

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Best Practices in Succession Planning

Identifying job requirements and characteristics of successful candidates

- Look forward, not backward. What environment will 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.

- For positions where education is not tied to licensing, many employers have been taking a second look at whether a 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 applicant pools have resulted.

- Think carefully about knowledge and skill requirements. Distinguish between what new employees need to know from the moment they walk in the door versus what can be learned 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 — 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.

> **Rural Health Care Succession Planning in Action**
>
> When a member of the executive leadership team at St. James Parish Hospital in Lutcher, Louisiana announced plans to retire, the succession plan for that position was activated.
>
> Because an internal successor had already been identified, the transition took place gradually over the course of a full year. This gave the successor plenty of time to learn from the incumbent and maintain continuity in the position.

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Creating a talent pipeline

- Identify people inside and outside your organization who could potentially be a good fit for critical roles. 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, and reassure others 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.

- Where possible, make it a practice to cross-train employees. Cross-training may involve formal classroom-style learning, job shadowing, or on-the-job experiences.

- 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 both the simple and more complex job responsibilities as soon as possible.

- Maintain a strong network of external contacts, including other health care organizations, rural health networks, local colleges and universities, your State Office of Rural Health, and others who may be able to help you connect with potential successors for critical roles.

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Re-assessing the plan

- Review your succession plan annually at a minimum. Evaluate job descriptions and qualifications for critical positions to be sure they accurately reflect the requirements of the job.

- Adjust your pipeline and action plans accordingly.

Succession Planning Tools

1. Environmental scan tool
2. Pipeline identification template

KEY TAKEAWAYS

- Succession planning is not only important for ensuring continuity — it's an essential part of employee development and career planning.

- Incumbent 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.

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Conclusion

One of the most important features of any successful organization is continuity of staffing. While it is true that the current environment poses significant workforce-related challenges, the Staff Sustainability Cycle provides a roadmap that rural health care organizations can follow to strengthen employee retention and engagement, resulting in positive impacts on patient care, team dynamics, organizational culture, and ultimately the health of the community.

"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." [13]

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[13] Studer, Q. (2020). *The Busy Leader's Handbook: How To Lead People and Places That Thrive.* Wiley.

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Other Workforce-Related Resources

- [National Rural Recruitment and Retention Network](#) (3RNET)

- National Rural Health Resource Center's [Workforce and Culture Resources](#) collection

- RHI Hub's [Rural Healthcare Workforce resources](#)