

Recruitment and Retention Plan Guide

Rural Network Allied Health Training Program Technical Assistance

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BACKGROUND AND PURPOSE

Rural Health Innovations (RHI), LLC is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are leading national technical assistance and knowledge centers in rural health. In partnership with The Center, RHI enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing TA to the Allied Health Training Network grantees through a contract with the federal Office of Rural Health Policy.

In general terms, a Recruitment and Retention Plan is an internal, organized work plan consisting of critical activities or steps to ensure timely placement and lasting retention of quality health care professionals. The purpose of this Guide is to identify planning and preparation activities for hiring Allied Health professionals with the intention of retaining them within an organization. It also proactively addresses both recruitment and retention as critical and necessary to the process.

Specifically, a Recruitment and Retention Plan Assessment with a Network Recruitment and Retention Action Plan, is a deliverable of the grant. RHI is supporting this deliverable by providing four sections: 1) a guide on the components of an effective recruitment and retention plan for network health care organization members, 2) an assessment tool of recruitment and retention activities for each of the network hiring organization members to complete, 3) an action plan for the network or project director to identify opportunities to support health care network members in improving their recruitment and retention plans, 4) a samples document.

- The role of the network or project director is to ensure that each participating health care organization is prepared for the recruitment and retention of participating students as they complete the project training and enter the workforce as allied health professions.
- The completed assessment will help measure your organization's readiness to hire the participating Allied Health professionals being trained and identify areas for improvement that your Allied Health Training Network may be able to support.

Content for the *Recruitment and Retention Plan Guide and Assessment* and the *Network Recruitment and Retention Action Plan Template* have been adapted by Rural Health Innovations, RHI, from the *Midwest Retention Toolkit, 2012*, National Rural Health Resource Center and the *National Rural Recruitment and Retention Network (3RNet)*, and *Recruiting for Retention, The Manual*, National Rural Recruitment and Retention Network (3RNet), March 2015. See the Resources section for other content authors and helpful links and documents.

Getting Started

Why recruiting with retention in mind is critical for rural health care

organizations: Recruiting and retaining Allied Health professionals can be particularly profound in rural areas where the loss of even a single professional can impact health care delivery. The result is limited access to basic health care services for thousands of residents spread over hundreds of square miles. To successfully recruit and retain Allied Health professionals, rural communities must overcome a host of barriers such as isolation, boom and bust economic cycles, understaffed facilities, and overworked medical staff. Yet despite the importance of quality allied health care professionals, and the stiff competition for a limited supply, surprisingly few health care organizations go about recruiting and retaining these professionals in an organized fashion with a long-term view. Many pay scant attention to factors influencing current rates of retention and jump into the recruitment process without clearly understanding the cost of staff turnover and the benefits of staff retention.

Recruitment is episodic; retention is an investment: Differentiating between recruiting activities and retention activities is difficult since successful hiring and successful retention of employees is intertwined. Recruiting is an episodic effort. It includes activities to understand workforce need within the organization, identify key attributes of the needed position and person, and work to find potential employees that fit the need and match the key attributes. Whereas retention requires an investment with a long-term view that includes activities focused on how an employee relates to their work and the people in the organization, such as, recruitment and retention team activities, staff satisfaction, performance reviews, and mentoring opportunities.

Instructions

Network or Project Director:

1. Distribute this *Recruitment and Retention Plan Guide* and *Assessment* to each of your health care member organizations who are planning to hire the participating allied health professional students being trained.
2. Collect the completed assessments from participating member organizations.
3. Use the *Network Recruitment and Retention Action Plan Template* to summarize the results and create an action plan to support the recruitment for retention efforts of your network membership.

Member Health Care Organizations:

1. Complete the *Recruitment and Retention Plan Assessment* while referencing your organization's current health care professional recruitment and retention plan. You may also reference the *Recruitment and Retention Plan Guide* provided by your network or project director.
2. Return the completed *Recruitment and Retention Plan Assessment* to your Allied Health training program network or project director.

Next Steps for Network or Project Director:

1. Follow the directions provided within the EHB to submit this deliverable, referred to as an Employment Hiring Plan. The deliverable documents includes a summary of completed health care organizations' Recruitment and Retention Assessments and the completed Network Recruitment and Retention Action Plan.

RECRUITMENT AND RETENTION PLAN GUIDE

This *Recruitment and Retention Plan Guide* includes the following components:

1. Recruitment: Planning and Preparation

- a. Workforce Needs Assessment
- b. Recruitment and Retention Team
- c. Practice Opportunity Profile
- d. Recruitment Marketing Plan

2. Retention: Follow-Up and Follow-Through

- a. Pre-Orientation Activities
- b. Orientation Activities – First Week
- c. Onboarding Activities – First Year
- d. Recruitment and Retention Evaluation Plan

Within this Guide, each component includes a description with useful tips or suggestion. See *Recruitment and Retention Plan Samples* for further guidance.

RECRUITING: PLANNING AND PREPARATION

Planning and preparation is the most important ingredient for ensuring a successful recruitment effort. It is also the part most often neglected. Many communities jump in the recruitment process with little preparation, and in turn spend more time and money on recruitment and experience less retention success.

Workforce Needs Assessment

This section of the Recruitment and Retention Plan outlines quantifiable workforce information of existing allied health disciplines and training programs available in the organization's community or region. Additional information that may be helpful when analyzing workforce needs include the demographics of the service area and other health care organizations that employ the targeted allied health discipline.

Recruitment and Retention Team

From a practical standpoint, the recruitment and retention team approach is a very effective way to engage in all the tasks that come along with the recruitment and retention process, as well as cuts down on the amount of work for any one team member. To apply the team concept effectively, each team member must be assigned a specific job and delegated tasks and shared responsibility. This will keep team members focused and ensure efficient use of the team's time. See *Recruitment and Retention Team Sample on page 3 of the Recruitment and Retention Plan Sample*.

Recruitment and Retention Plan Guide

Most successful recruitment and retention efforts benefit from some level of community involvement, and the team approach is the best way to accomplish that. Community partnership in this process demonstrates that the community cares enough about local health care to actually be a part of its success.

You will want to include a diverse cross-section of the community as well as people who are both eager and appropriate for certain tasks at certain points during the recruitment and retention process. The roster of a successful team may include:

Health Care Representatives

- Clinic administrator
- Hospital administrator
- HR staff representative
- Allied Health staff representative
- Director of nursing
- Human Resources staff representative

Community Representatives

- Local economic development
- Education
- Chamber of commerce
- Community member for spouse/family
- Financial institution
- Realtor

Do not limit yourself to this list. It is merely a guideline to get you thinking about who in your community should be involved in the recruitment process.

Practice Opportunity Profile

There are three components that define a practice opportunity profile; opportunity description, candidate qualifications, and a community description. While most practice opportunity profiles include these components, it's how you define each one that will set your opportunity apart from the rest. Once defined and combined, this will form the practice opportunity profile and will be used to market your practice opportunities. *See Practice Opportunity Profile sample on page 4 of the Recruitment and Retention Plan Sample.*

A fully-defined practice opportunity profile will:

- Help you to understand the strengths and weakness of your opportunity;
- Help you better identify candidates who are right for your opportunity; and,
- Help candidates better understand whether your opportunity and community is right for them.

An effective practice opportunity profile should include, but is not limited to:

Practice Description:

- Type of allied health professional
- Scope of practice
- Practice setting
- Clinic/hospital name and location and description of services
- Staff make-up (i.e. number of physicians by specialty, advanced practice providers, in the group, etc.)
- Average # of patient visits per day
- Job responsibilities/expectations
- Work/call schedule
- Salary and benefit package information (i.e. salary/range offered, along with a summary of benefits such as health, life, dental, disability, flex, CME, vacation days, etc.)

Candidate Qualifications:

- Educational background desired (degree/licensure/certification)
- Preferred experience (if applicable)
- Necessary technical knowledge and skills required
- Ideal interpersonal skills and professionalism
- Preferred personal and professional qualities and characteristics

Community Description: (Needed for recruiting outside of local community)

- Location/Demographics
- Economy
- Local organizations
- Major employers
- Education
- Shopping
- Culture
- Recreation

Loan Repayment

Your State Office of Rural Health and Primary Care and/or State Department of Health may offer a range of loan forgiveness and repayment programs available to health care students. Some of these programs require the participant to work in a designated rural area or a health professional shortage area. If your state offers such programs, be sure to include this information in your practice opportunity overview. It is also important to know whether you, as the hiring facility, offers any type of loan repayment incentives as part of your employment offer.

Health care professionals often graduate with education debt, therefore the influence of available loan repayment and forgiveness programs or offers will be very attractive to students and potential candidates. Keep in mind that state and federal loan repayment and forgiveness programs will most always result in financial penalties for the health care professional if the health care professional defaults in some way, such as leaving the job before the commitment has been fulfilled, which is most likely the same for offerings made to new hires by your clinic or hospital.

Listed below are places you can learn more about loan repayment and forgiveness programs in your state:

- Rural Assistance Center – www.raonline.org/funding/type
- Primary Care Office - <http://bhpr.hrsa.gov/shortage/hpsas/primarycareoffices.html>
- National Health Service Corp - <http://nhsc.hrsa.gov/loanrepayment/>
- 3RNet Member - <https://www.3rnet.org/members/organizational-members>
- State Office of Rural Health - <http://nosorh.org/nosorh-members/nosorh-members-browse-by-state/>

Recruitment and Retention Marketing Plan

To strategically market your organization and community, you need to develop a plan. The purpose of writing a marketing plan is to help you to clearly define what you'd like to achieve, determine which audience(s) you want to communicate with, and develop a strategy and plan of action within your budget that will ultimately result in achieving your recruitment and retention goals. *See Recruitment Marketing Plan Sample on page 6 of the Recruitment and Retention Plan Sample.*

During the marketing process, some important things to remember include:

- Recruitment activity expenses can add up quickly
- Filling health care professional open positions in a timely manner is extremely important
- There will be an increase in the amount of work that goes into finding, interviewing, integrating, and retaining top candidates for your open position(s)

Recruitment and Retention Plan Guide

There are four key components that make up a sound marketing plan:

1. Recruitment Budget:

You may be given a budget to work with before you create your work plan. If so, select tactics that fit within your budget. Bigger doesn't necessarily mean better or cost-effective, so use creativity in promoting your community. Often, small budget items can be quite effective.

Alternatively, you may be asked to propose a budget based on the work plan you want to implement. If so, be prepared to justify your proposed expenditures. Your organization may be looking for you to link costs with projected results. See *Recruitment Budget Sample on page 7 of the Recruitment and Retention Plan Sample*.

2. Target Audience:

It is important to define and understand your target audience(s), as this will affect how you promote your practice opportunity. The following are tips for targeting your recruitment and retention strategies and efforts:

- Defining your target audience(s) will allow you to focus your marketing activities and make them more cost-effective.
- Knowing what motivates your target audience(s) will enable you to create and position marketing messages more likely to have actionable results.
- Take into account how your target audience(s) prefer to receive information so you can choose the most effective communication channels. For example, younger generations may be more receptive to communicating electronically and using social media tools.
- Ensure each marketing strategy is an effective way to reach your target audience(s). For example, a strategy may apply to more than one target audience; in other cases, you may need to vary or customize your strategies depending on the audience you are trying to reach.

3. Work Plan with Timeline:

Outline a specific timeline or due date for each activity and task. This way, expectations regarding the delivery or performance of each activity are then clear. During the planning process, assign responsibility for each action step to an individual. Accountability will increase the likelihood these action steps are completed successfully.

4. Promotion:

There are many venues in which to promote your practice opportunity. Some examples include:

- Display ads
- Brochures
- Fliers
- Mailings
- Internet job boards
- Journals
- Recruitment firms
- Career Fairs
- Social media
- Organizational website
- Education program visits
- Social media

Interview Questions

Many different health care careers fall under the banner of the Allied Health profession, with very different qualifications and types of professional expertise relevant to each one, therefore it's important to have interview questions that are relevant to each. See *Interview Questions Sample on page 9 of the Recruitment and Retention Plan Sample*.

Because Allied Health professionals work in client facing roles, and deal with a wide variety of people, questions designed to draw out necessary skills and qualities is extremely important. Some of these areas may include:

- Interpersonal skills and professionalism
- Self-management and coping skills
- Ability to interact with patients and family
- Ability to foster a team environment
- Technical knowledge and skills
- Effort and motivation
- Ethical behavior
- Desire for ongoing professional learning and development

RETENTION: FOLLOW-UP AND FOLLOW-THROUGH

At this phase of the recruitment and retention process, thinking shifts from hiring the right person, to considering how to retain them in your health care organization long-term. This shift to retention-thinking begins as soon as a candidate accepts an employment offer, and continues throughout the length of employment. The key components of successful retention is to maintain regular contact with new health care professionals and their families to stay aware and informed of their acclimation within the workplace and community, and to actively mitigate any potential problems that could impact their desire to remain in the community.

Orientation and Onboarding

Once the new health care professional begins employment, it is important that they feel at home. Therefore it's imperative that you develop a comprehensive orientation and onboarding work plan. *See Orientation and Onboarding Work Plan Sample on page 10 of Recruitment and Retention Plan Sample.*

Pre-Orientation Activities

Pre-orientation activities take place before the new hire begins employment and may include activities such as:

- Sends welcome letter including date/time/location of orientation
- Schedules photo arrangements
- Initiates notification of new hire internally, via website, newsletters, etc.
- Assigns new hire and spouse/family mentors
- Schedules hospital/clinic tours
- Ensures ID badge, uniform, parking instructions and building keys are ready to distribute

Orientation Activities – First Week

Orientation activities take place during the first week of employment and may include activities such as:

- Provides general orientation of the hiring organization, job responsibilities, departmental relationships, medical equipment, electronic health record, affiliated clinics/programs, referral system, organizational mission/vision, etc.
- Human Resources holds meeting with new hire to cover employee handbook, tax forms, benefit package, pre-employment physical, payroll procedure, etc.
- Provides name/ID badge, uniform, parking instructions and building keys.
- Mentor introductions to new hire and spouse/family, along with provide weekly lunch meetings schedule.

Onboarding Activities – First Year

Onboarding activities typically take place over the course of the first year of employment and may include such activities as:

- Gathers feedback from new hire to determine necessary improvements with orientation/ onboarding process.
- Employee mentor remains in contact quarterly for first year of employment.
- Community Mentor remains in contact with spouse/family on a quarterly basis for first year of Allied Health professional employment.
- Holds quarterly meetings for first year to gather feedback on organization and community integration, job duties/work schedule, and problems/questions.
- Implement employee performance agreement and holds annual review.
- Administers annual employee satisfaction survey.

Supplementary Recruitment and Retention Plan Activities

Supplementary recruitment and retention plan activities can be one-time tasks such as establishing new programs or considering various new employee offerings. They can also be activities that may need to be done on an annual basis. Some of these activities may include:

- Establishing an Allied Health professional and spouse/family mentor program(s)
- Establishing a staff recognition program
- Organization becomes a clinical preceptor/internship site
- Regularly performs environmental scans of state/regional salary and benefits to maintain competitiveness

Employee Performance Agreement and Annual Review

Performance agreements between an organization and its employee are used to define accountability for specific organizational goals, help employees align their daily activities with those goals, and lead to improved overall organizational results. When the organization aligns employee performance agreements with its goals, they can better understand the connection between their daily activities and goal achievement. See *Employee Performance Agreement Sample on page 16 of Recruitment and Retention Plan Sample.*

Employee Satisfaction Survey

Employee satisfaction surveys provide insight into organizational health, especially quality of patient care and retention of qualified health professionals. An employee satisfaction survey should measure perceptions, attitudes and satisfaction, and should be analyzed to determine necessary improvements in your organizational policies, processes and procedures. See *Employee Satisfaction Survey Sample on page 17 of the Recruitment and Retention Plan Sample.*

Recruitment and Retention Evaluation Plan

Selecting key process and outcome data and identifying specific and defined measurements is critical to evaluating your recruitment and retention plans and efforts. Good evaluation also includes considering when to collect the data and who is responsible. Lastly, monitoring and tracking key measures is important for both illustrating plan progress and impact and creating opportunity for on-going improvement.

See Recruitment and Retention Evaluation Scorecard Sample on page 12 of the Recruitment and Retention Plan Sample, for an example of a scorecard that may be helpful for identifying key components of a recruitment and retention evaluation plan.

Examples of key measures include:

- Number of new students recruited in to program(s)
- Number of students completing training
- Number of students achieving licensure or certification
- Number of graduates employed in network member organization(s)
- Overall job satisfaction of program graduate employees
- Employment retention of new hires

RESOURCES

Recruiting for Retention Manual (\$45)

National Rural Recruitment and Retention Network (3RNet)

<https://www.ruralcenter.org/mnwebrecruitment/recruiting-retention-manual-0>

Midwest Retention Toolkit

National Rural Health Resource Center, National Rural Recruitment and Retention Network (3RNet)

<https://www.ruralcenter.org/minnesota-web-recruitment/resources/midwest-retention-toolkit>

United States Department of Labor

Bureau of Labor Statistics

<http://www.bls.gov/bls/blswage.htm>

Evaluation Plan Toolkit: Allied Health Training Network Program

Rural Health Innovations

<https://www.ruralcenter.org/resources/allied-health-program-evaluation-planning-and-tools>

Allied Health Student Outreach Webinar Recording

Rural Health Innovations

<https://www.ruralcenter.org/network-ta/resources/allied-health-student-outreach>