Recruitment and Retention Plan

Samples

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.

# Samples

## Recruitment and Retention Team Work Plan Sample

| **Action Step** | **Due Date** | **Lead Person** | **Status** | **Notes** |
| --- | --- | --- | --- | --- |
| **RR Team Formation and First Steps:** |  |  |  |  |
| * Define ideal organizational staff and community members to form a recruitment and retention team. |  |  |  |  |
| * Write clear team job descriptions. |  |  |  |  |
| * Design an RR Team orientation packet and RR training program. |  |  |  |  |
| * Determine language and method of inviting potential team members. |  |  |  |  |
| * Disseminate formal initiations. |  |  |  |  |
| * Track invitation acceptances and declines. |  |  |  |  |
| * Once RR team is assembled, send welcome letters with date/time/location of RR team orientation and training. |  |  |  |  |
| * Recognize and thank RR team members often. |  |  |  |  |
| * Following the Recruitment and Retention Guide, design a Recruitment and Retention Plan |  |  |  |  |
| **Recruitment: Planning and Preparation:** |  |  |  |  |
| * Workforce Needs Assessment |  |  |  |  |
| * Practice Opportunity Profile |  |  |  |  |
| * Recruitment Marketing Plan |  |  |  |  |
| * Understand Loan Repayment Options |  |  |  |  |
| * Recruitment Budget |  |  |  |  |
| * Interview |  |  |  |  |
| **Retention: Follow-up and Follow-Through:** |  |  |  |  |
| * Pre-Orientation Activities |  |  |  |  |
| * Orientation Activities – First Week |  |  |  |  |
| * Onboarding Activities – First Year |  |  |  |  |
| * Recruitment and Retention Evaluation Plan |  |  |  |  |

## Practice Opportunity Profile Sample

University Clinic in Crosby, MN is seeking a full-time Physical Therapist Assistant (PTA).

**Physical Therapist Assistant opportunity includes:**

* Outpatient practice
* Full-time position, 5 days per week
* No call
* Average of 8-10 patients per day
* Physical Therapy practice supported by 3 Physical Therapists and 4 PTAs
* Competitive compensation package, loan repayment, relocation and full benefits

**PTA Qualifications:** Must be able to work as part of a team to provide physical therapy services under the direction and supervision of the physical therapist. PTA will implement selected components of patient/client interventions (treatment), obtain data related to the interventions provided, and make modifications in selected interventions either to progress the patient/client as directed by the physical therapist or to ensure patient/client safety and comfort.

PTA will assist the physical therapist in the treatment of individuals of all ages, from newborns to the very oldest, who have medical problems or other health-related conditions that limit their abilities to move and perform functional activities in their daily lives.

**Education:** Must have graduated from a CAPTE-accredited PTA program with Associates Degree and appropriate state certification.

**Clinic:** Located in the heart of the Cuyuna Lakes Area, University Clinic has been able to attract dedicated, quality health care professionals and support staff, along with the required up-to-date technology, and regional resource for advanced diagnostic and therapeutic healthcare services. University Clinic’s unique brand of personalized care is characterized by a record of sustained strength and steady growth reflected by an ever-increasing range of services offered.

**Hospital:** University Medical Center, Crosby, MN. Critical Access Hospital with 25 beds.

**Hospital Services:** State-of-the-art surgery center, ER and ambulance, radiology, laboratory, rehabilitation, oncology, pharmacy, birthing center, hospice and home health. There are also three outpatient clinics located in Baxter Longville as well as a care center and a senior living community offering independent, assisted and memory care services. Partnerships include the Minneapolis Heart Institute, Allina Health’s Virginia Piper Cancer Institute, Home Health Partnership, Adult & Pediatric Urology, and Great River/Crosby Eye Clinic. Branded service lines include the Minnesota Institute for Minimally Invasive Surgery (MIMIS), Minnesota Center for Orthopedics, Breast Health Alliance, and Presbyterian Homes. Ranked along with the Mayo Clinic and University of Minnesota as a site for major surgery innovation, CRMC was the first hospital to offer minimally invasive surgery. MIMIS is the only fellowship program in the United States and Canada to achieve accreditation in three specialties: minimally invasive surgery, bariatric surgery, and flexible endo-surgery. The organization offers numerous teaching and other fellowship programs and has attracted specialists who could practice anywhere in the world.

**Crosby, MN:** Welcome to Crosby where small town friendliness and service are a tradition. Built around Serpent Lake in the heart of Cuyuna Country, the Crosby area offers dozens of beautiful natural lakes and is well known for some of the finest walleye, northern pike, trout and pan fish in Minnesota. There is a lot more than great fishing. Diving clubs from across the Midwest are drawn to the pristine waters of our mine lakes to explore remnants of the old mining days under the surface.

Summer is a special time to visit Crosby, but fall and winter offer their own rewards. As the temperature cools, the northern pike get extremely aggressive. Grouse, ducks, small game and whitetail deer are available to the hunter. If you want to work out, swimming, play hockey or garden, check out the Hallett Community Center. When the day is done, just sit back, relax and savor the freshest, cleanest air around, right here in Crosby.

***New graduates are encouraged to apply.***

## Recruitment and Retention Marketing Plan Sample

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Marketing Activities** | **Audience** | **Description** | **Due Date** | **Lead Person** |
| **Promotion and Publicity** |  |  |  |  |
| * Print Materials |  |  |  |  |
| * Give-Aways |  |  |  |  |
| **Advertising** |  |  |  |  |
| * Website | * General Public | * + Post practice opportunity and monitor page views * Review resumes submitted |  |  |
| * Journals |  |  |  |  |
| * Social Media |  | * Facebook * Twitter * LinkedIn * YouTube |  |  |
| * Direct Mailing |  |  |  |  |
| **In-Person Recruitment** |  |  |  |  |
| * Career Fairs | * High School Students | * High School A * High school B |  |  |
| * Career Fairs | * College Students | * Community College C * 4 year College D * Technical College E |  |  |
| * Recruiting Service | * Currently employed professionals |  |  |  |
| * Conference Exhibits |  |  |  |  |

## Recruitment Budget Work Plan Sample

|  |  |
| --- | --- |
| **[Insert Allied Health Professional type here] Recruitment Budget** | |
| Recruitment Activities Start Date: | |
| Length of Budget Period: | |
| **Developing Materials for Promotion** | |
| Talent fee (graphic artist, photographer, writer, video): | $ |
| Printing (display ads, brochure, flier): | $ |
| Materials (letterhead, envelopes, stationary): | $ |
| Other: | $ |
| **Total:** | **$** |
| **Posting Open Positions and Advertising** | |
| Internet site(s): | $ |
| Journal(s): | $ |
| Other: | $ |
| **Total:** | **$** |
| **Contracting with Outside Recruitment Assistance** | |
| Recruitment Firm: | $ |
| Candidate Sourcing Services: | $ |
| Other: | $ |
| **Total:** | **$** |
| **Direct Marketing Expenses** |  |
| Postage: Mailing Lists: | $ |
| Toll-free Number: |  |
| Other: | $ |
| **Total:** | **$** |
| **In-Person Recruitment** |  |
| Educational Program Visits (include travel expense): | $ |
| Conference Recruitment Display/Exhibit Fee(s): | $ |
| Other: | $ |
| **Total:** | **$** |
| **New Hire Background Checks** | **$** |
| Credentials Check(s): | $ |
| Background Check(s): | $ |
| Other: | $ |
| **Total:** | **$** |
| **Recruitment and Retention Budget Total:** | **$** |

## Interview Questions Sample

**Allied Health Profession Specific Questions**

1. What previous experience do you have in this Allied Health Professional role?
2. How has your past work experience and education prepared you for this position?
3. How do you keep up with the latest advancements in your field?
4. What support training would you desire or require to be able to do this job?
5. How would you present complicated information/instructions to patients?
6. What do you do if you disagree with a patient?
7. How would you communicate with a patient who was confused about your presence?
8. Tell me about a recent situation in which you had to deal with a very upset patient or staff member.

**General Questions**

1. Tell me about yourself.
2. What do you see as your main strengths and weaknesses?
3. What unique qualities or abilities would you bring to this job?
4. List five words that describe your character.
5. Describe how you keep yourself organized with a heavy case load.
6. Give an example of how you work well under pressure?
7. Describe a time when you were faced with a stressful situation and you demonstrated your coping skills.
8. Give an example of how you worked well within a team and how did good work independently?
9. Describe a time when you anticipated potential problems and developed preventive measures.
10. Give an example of how you handled a difficult situation with a supervisor?
11. What is your typical way of dealing with conflict?
12. What are your professional goals?
13. What do you look for in terms of organizational culture?
14. Give me some insight on why did you left your last job?

## Orientation and Onboarding Work Plan Sample

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Provider Name:** | **Profession:** | | | | |
| **Anticipated Start Date:** | | | | | |
| **Clinic Location:** | | | | | |
| **Action Step** | | **Due Date** | **Lead Person** | **Status** | **Notes** |
| **PRE-ORIENTATION ACTIVITIES** | | | | | |
| Send welcome letter including date/time/location of orientation. | |  |  |  |  |
| Initiate photo arrangements and internal, website, and human resources announcement/notification of new hire. | |  |  |  |  |
| Assign and notify professional and spouse/family mentors and schedule weekly lunches if applicable. | |  |  |  |  |
| Schedule hospital and clinic tours and staff introductions. | |  |  |  |  |
| Ensure ID badge, uniform, parking instructions and building keys are ready to distribute. | |  |  |  |  |
| Assign phone number, email address and passwords as necessary. | |  |  |  |  |
| **ORIENTATION ACTIVITIES – FIRST WEEK** | | | | | |
| Provide name/ID badge, uniform, parking instructions and building keys if applicable. | |  |  |  |  |
| Orientate new hire to provide a general orientation of the organization, organizational mission/vision, affiliated clinics/programs, departmental relationships, staff meetings, job responsibilities and work schedule. | |  |  |  |  |
| Orientate on medical equipment, electronic health record, and referral system. | |  |  |  |  |
| Human Resources holds meeting with new hire to cover employee handbook, tax forms, benefit package, pre-employment physical, timesheet/payroll procedure, relocation expenses, etc. | |  |  |  |  |
| Mentor introductions to new hire and spouse/family mentors along with provide weekly lunch meetings schedule. | |  |  |  |  |
| **ONBOARDING ACTIVITIES – FIRST YEAR** | | | | | |
| Gather feedback from new hire to determine necessary improvements with orientation/ onboarding process. | |  |  |  |  |
| Community Mentor remains in contact with spouse/family on a quarterly bases for first year of Allied Health professional employment. | |  |  |  |  |
| Hold quarterly meetings for the first year to gather feedback on organization/community integration, job duties/work schedule and problems/questions. | |  |  |  |  |
| Administer annual professional and spouse/family mentor program satisfaction surveys. | |  |  |  |  |
| Administer annual employee satisfaction survey. | |  |  |  |  |
| Implement an employee performance agreement. | |  |  |  |  |
| Hold annual employee performance reviews. | |  |  |  |  |

**Ideas for Supplementary Recruitment and Retention Activities**

* Establish an Allied Health professional and/or spouse/family mentor program(s)
* Establish a staff recognition program
* Consider new offerings to employees such as time off and stipend toward continuing medical education or reimbursement for licensure renewals and/or additional certifications
* Organization is a clinical preceptor/internship site
* Determine whether or not your state or the Federal Government offers Allied Health professional loan repayment
* Regularly performs environmental scans of state/regional health care professional salary and benefits to maintain competitiveness

## Recruitment and Retention Evaluation Scorecard Sample

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Recruitment and Retention Plan Objective** | **What** | | | **When** | **Who** |
| **Target** | **Definition of Measure** | **Method of Collecting Data** | **Frequency of Data Collection** | **Person responsible for Data Gathering** |
| 1. % of program graduates employed in network member organizations | 80% | * Program graduates employed within 12 months after end of program | * Input from graduated students | * Quarterly for one year after end of program | * Prog. Coord. |
| 1. Overall staff satisfaction Good or Excellent | 90% | * Employed program graduates answer good or excellent to Overall Job satisfaction questions | * Input from graduated students | * Annual on end of program anniversary | * Prog. Coord. |
| 1. % of new hire retention for 1 year | 80% | * Program graduates employed for at least one year at same organization | * Input from graduated students | * Annual on end of program anniversary | * Prog Coord. |

## Employee Performance Agreement Sample

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name**:  **Anniversary:**  **Position:** | | | **Mid-Year Review Date:**  **Annual Review Date**: | | |
| **Key Performance Areas** | **Goals/Objectives**  *Describe the area.* | **Action Plan**  *Steps taken meet the goals/objectives.* | | **Measures of Goal Success and Results of 2016-2017**  *How goal success will be measured.* | **Outcomes/ Follow up for 2016-2017**  *Status at 6 months and annual check-in. Describe any follow-up/changes.* |
| **Organization Values** |  |  | |  |  |
| **Learning and Growth** |  |  | |  |  |
| **Customer Service/ Satisfaction** |  |  | |  |  |
| **Specific Job Duties or Responsibilities** |  |  | |  |  |
| **Teams Participation and Engagement** |  |  | |  |  |

Employee Signature and Date:

Supervisor Signature and Date:

## Employee Satisfaction Survey Sample

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employee Satisfaction Survey Questions** | **Strongly Agree**  **5** | **Agree**  **4** | **Neutral**  **3** | **Disagree**  **2** | **Strongly Disagree**  **1** |
| 1. I understand our organization’s mission and values. |  |  |  |  |  |
| 1. I received adequate orientation and training. |  |  |  |  |  |
| 1. I am provided appropriate technology and equipment for my job duties. |  |  |  |  |  |
| 1. My work space conditions are adequate (temperature, ventilation, space, clean). |  |  |  |  |  |
| 1. I am satisfied with my work and call schedule. |  |  |  |  |  |
| 1. My coworkers are approachable. |  |  |  |  |  |
| 1. Interpersonal conflict is resolved effectively. |  |  |  |  |  |
| 1. My supervisor is approachable. |  |  |  |  |  |
| 1. I am given enough recognition by leadership for my efforts. |  |  |  |  |  |
| 1. Leadership supports my professional goals. |  |  |  |  |  |
| 1. I am provided sufficient time off and funds for CME or professional development. |  |  |  |  |  |
| 1. I believe my salary is fair for my responsibilities. |  |  |  |  |  |
| 1. I am satisfied with my overall benefits package. |  |  |  |  |  |
| 1. The performance review process is fair and effective. |  |  |  |  |  |
| 1. Overall, I am satisfied with employment at (Organization Name). |  |  |  |  |  |
| 1. I would recommend working at my organization. |  |  |  |  |  |

Please tell us how we can increase your satisfaction as an employee:

## Employee Exit Interview Sample

*Thank you for your service. Information from this questionnaire will be used to improve the quality of working conditions for (organization name) and will be treated as confidential. If you would like the opportunity to discuss your responses, please provide your contact information at the end of the questionnaire.*

Exit Interview Date: Employment End Date:

Employee Name: Organization:

Job Title: Manager:

Employment Start Date:

1. What are your primary reasons for leaving employment with (organization name)?

2. Rate all aspects of your employment experience.

| **Employee Exit Survey Questions** | **Strongly Agree 4** | **Agree 3** | **Disagree 2** | | **Strongly Disagree 1** |
| --- | --- | --- | --- | --- | --- |
| 1. I received adequate orientation and training. |  |  |  | |  |
| 1. The community met cultural/recreational needs. |  |  |  | |  |
| 1. My job gave me a sense of accomplishment. |  |  |  | |  |
| 1. My workload was acceptable. |  |  |  | |  |
| 1. I was provided appropriate technology and equipment for my job duties. |  |  |  | |  |
| 1. Coworkers were approachable. |  |  |  | |  |
| 1. My supervisor was approachable. |  |  |  | |  |
| 1. There was adequate communication between leadership and staff. |  |  |  | |  |
| 1. (Organization) supported my professional goals. |  |  |  | |  |
| 1. Leadership provided enough recognition of my efforts. |  |  |  | |  |
| 1. Interpersonal conflict was resolved effectively. |  |  |  | |  |
| 1. I was provided sufficient time off/funds for continuing education. |  |  |  | |  |
| 1. Employee performance review process was fair and effective. |  |  |  | |  |
| 1. My salary was fair for my responsibilities. |  |  |  | |  |
| 1. I was satisfied with my overall benefits package. |  |  |  | |  |
| 1. Overall, I was satisfied with employment at (Organization). |  |  |  |  | |
| 1. I would recommend employment with (Organization). |  |  |  |  | |

**Additional Comments:**

**Contact Information** (optional):  
Name:  
  
Phone: Email: