Recruitment and Retention Plan Assessment Summary and Action Plan Templates

Templates for Networks and their Members

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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.

One of the ways RHI supports networks is by providing a Recruitment and Retention Plan Toolkit. 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 the Toolkit is to proactively addresses both recruitment and retention as critical and necessary to the process.

**The Recruitment and Retention Plan Toolkit Consists of Four Documents:**

1. A **Guide,** describing the components of an effective recruitment and retention plan for networks and their member organizations. Each component includes a description and useful tips or suggestions.
2. A **Recruitment and Retention Assessment** used to measure network member organizations’ readiness to hire and retain quality health care professionals.
3. An **Assessment Summary Template** used to summarize and document averages of completed Recruitment and Retention Plan Assessments, to assist in identifying areas networks can best assist their member organizations in their recruitment and retention efforts.
4. An **Action Plan Template** used to document identified areas from the Assessment Summary, and create individual action plans describing how the network will provide member support in those areas.

Content for the *Recruitment and Retention Plan Toolkit* have been adapted by Rural Health Innovations, 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.

# Network Recruitment and Retention Plan Summary

The Recruitment and Retention Plan Summary is a starting point for your assessment of your network members’ efforts toward effective Recruitment and Retention planning. Summarizing your members’ progress will help you as a network leader to carefully consider and understand the members’ awareness of and preparedness for recruiting and retaining newly trained Allied Health professionals.

**Instructions:**

1. Complete the Assessment Summary Template by compiling scores from the completed Recruitment and Retention Plan Assessments and record averages for each line item.
2. Identify three areas from the Assessment Summary, with an average score of 3.0 or less, that you believe your network can assist in providing support for improving members’ recruitment and retention planning efforts.
3. Using the Action Plan Template, create an individual Action Plan for each of the three identified areas, describing how your network will provide that support.

## Recruitment and Retention Plan Assessment Summary Template

**SCORING: 5-**Fully Completed **4-**In Progress **3-**Being Considered **2-**Have Not Considered **1-**Will Not Complete

|  |  |
| --- | --- |
| **RECRUITMENT: Planning and Preparation** | **Average Rating** |
| **Workforce Needs Assessment** | A Workforce Needs Assessment has been completed to determine the number and type(s) of health care professional(s) needed for our geographic service area. |  |
| **Recruitment and Retention Team** | A Recruitment and Retention Team has been assembled. |  |
| Recruitment and Retention Team includes health care facility representatives. |  |
| Recruitment and Retention Team includes community representatives. |  |
| **Practice Opportunity Profile** | A Practice Opportunity Profile (job description) has been developed. |  |
| Organization name and location, scope of practice, job responsibilities, work/call schedule and salary/salary range are described in the Practice Opportunity Profile. |  |
| Educational background, degree/licensure/certification, experience preferred and desired personal characteristics are described in the Practice Opportunity Profile. |  |
| Community characteristics are described in the Practice Opportunity Profile. (i.e. city, service area, population, economy, culture, recreation, amenities, education system, major employers, etc.) |  |
| **Loan Repayment** | Organization is aware of any federal and/or state health care professional loan repayment available, and has included information in the Practice Opportunity Profile. |  |
| **Interview Questions** | Recruitment and Retention Team maintains and utilizes a comprehensive list of interview questions geared toward specific health care professionals. |  |
| **Marketing Plan** | A recruitment marketing plan has been created. |  |
| A recruitment budget has been determined |  |
| Recruitment target audiences have been determined to promote specific health care professional Practice Opportunity Profile. |  |
| Venues and methods of promotion have been determined (i.e. outside recruitment services, social media, organization website, newspaper, career fairs, etc.) |  |

**SCORING: 5-**Fully Completed **4-**In Progress **3-**Being Considered **2-**Have Not Considered **1-**Will Not Complete

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| --- | --- |
| **RETENTION: Follow-Up and Follow-Through** | **Average Rating** |
| **Pre-Orientation Activities** | Sends welcome letter including date/time/location of orientation. |  |
| Coordinate photo arrangements, new employee announcement (department, organization website, organization newsletter, newspaper, etc.) |  |
| Assigns mentors to new hire and spouse/family (if applicable). |  |
| Schedules hospital/clinic tour and staff introductions. |  |
| Assigns phone number, email address and passwords as necessary. |  |
| Coordinates and ensures ID badge, uniform, parking instructions and building keys are ready to distribute on the first day. |  |

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| **Orientation****Activities – First Week** | Provides general orientation of hiring organization, mission/vision, affiliated clinics/programs, departmental relationships, staff meetings, job responsibilities and work schedule. |  |
| Provides orientation on department processes/procedures, 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. |  |
| Delivers name/ID badge, uniform, parking instructions and building keys if applicable. |  |
| Mentor introductions to new hire and spouse/family (if applicable). Provide weekly lunch mtgs schedule. |  |
| **Onboarding Activities – First Year** | Gathers feedback from new hire for improvements to the orientation/onboarding process. |  |
| Community Mentor remains in contact with spouse/family on quarterly for first year (if applicable). |  |
| Supervisor holds quarterly meetings for the first year to gather feedback on organization/community integration, job duties/work schedule and problem solving/questions. |  |
| Recruitment and Retention Team administers annual new employee and spouse/family (if applicable) mentor program satisfaction surveys. |  |
| Administers an annual employee satisfaction survey. |  |
| Administers an employee performance agreement process and holds annual performance review. |  |

**SCORING: 5-**Fully Completed **4-**In Progress **3-**Being Considered **2-**Have Not Considered **1-**Will Not Complete

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| --- | --- |
| **RETENTION: Follow-Up and Follow-Through**  | **Average Rating** |
| **Supplementary Recruitment and Retention Activities** | Recruitment and Retention Team administers an Allied Health professional mentor program. |  |
| Recruitment and Retention Team administers a spouse/family mentor program (if applicable). |  |
| Organization administers a staff recognition program. |  |
| Organization offers time off for and provides stipend toward continuing medical education. |  |
| Organization pays for licensure renewals and/or additional certifications. |  |
| Organization regularly performs state/regional environmental health care professional salary and benefits scans to ensure competitiveness. |  |
| Organization is a clinical preceptor/internship site. |  |
| Organization determines if there are State and/or Federal health care professional loan repayment programs available. |  |
| **Evaluation Activities** | Recruitment and Retention Team utilizes an evaluation scorecard for continued performance improvement with your Recruitment and Retention Plan. |  |
| Recruitment and Retention Team performs frequent reviews of the Recruitment and Retention Plan, in its entirety, to identify, assess and address its effectiveness. |  |
| Organization administers an annual employee satisfaction survey. |  |
| Organization analyzes and evaluates annual employment satisfaction survey responses for necessary organizational changes. |  |
| Organization administers employee exit surveys as applicable. |  |

# Network Recruitment and Retention Action Plan #1

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| 1. **Recruitment and Retention Plan Improvement:**
 |
| *List title or brief description of first improvement identified from the Assessment Summary here.* |
| **Actions:** *(3-5 actions over 6-12 months)* | **Who Will Implement:**  | **Start Date:** | **Due Date:** |
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# Network Recruitment and Retention Action Plan #2

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| 1. **Recruitment and Retention Plan Improvement:**
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| *List title or brief description of second improvement identified from the Assessment Summary here.* |
| **Actions:** *(3-5 actions over 6-12 months)* | **Who Will Implement:**  | **Start Date:** | **Due Date:** |
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# Network Recruitment and Retention Action Plan #3

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| 1. **Recruitment and Retention Plan Improvement:**
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| *List title or brief description of third improvement identified from the Assessment Summary here.* |
| **Actions:** *(3-5 actions over 6-12 months)* | **Who Will Implement:**  | **Start Date:** | **Due Date:** |
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