

Recruitment and Retention Plan Guide

A Toolkit 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 workplan 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 address 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 Guide, Recruitment and Retention Plan Assessment, Recruitment and Retention Plan Assessment Summary, and the Recruitment and Retention Action Plan Template have been adapted by 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.

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Getting Started

Recruiting for Retention is Critical

Recruiting and retaining health care 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 health care 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 health care professionals, and the stiff competition for a limited supply, surprisingly few health care organizations go about recruiting and retaining 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.

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Recruitment and Retention Plan Toolkit Instructions

Network/Project Director:

1. Distribute this *Recruitment and Retention Plan Guide*, along with the *Recruitment and Retention Plan Assessment* to your member health care organizations. Completed assessments will help you measure member readiness to hire and retain quality health care professionals.
2. Use the *Assessment Summary Template* to summarize and document averages of completed *Recruitment and Retention Plan Assessments*, to assist in identifying areas your network can best assist your member organizations in their recruitment and retention efforts.
3. Use the *Action Plan Template* to document identified areas from the Assessment Summary and create individual action plans that will describe how network will provide member support in those areas.

Member Health Care Organizations:

1. Complete the *Recruitment and Retention Plan Assessment* while referencing your organization's current recruitment and retention plan. You may also reference this *Recruitment and Retention Plan Guide*.
2. Return completed Assessment to the Network/Project Director.

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This Guide includes the two phases of recruitment and retention:

I. Planning and Preparation (Recruitment)

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

II. Follow-Up and Follow-Through (Retention)

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

PLANNING AND PREPARATION (RECRUITMENT)

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 health care disciplines in the organization's community or region. Additional information that may be helpful when analyzing workforce needs including the demographics of the service area and other organizations that employ health care professionals.

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.

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

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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, but is not limited to:

Health Care Organization Representatives

- Clinic Administrator
- Hospital Administrator
- Department Manager
- Staff Mentor
- Director of Nursing
- Human Resources

Community Representatives

- Realtor
- Dept. of Education
- Chamber of Commerce
- Community Member
- Financial Institution
- Local Economic Development
- Police/Fire/EMS
- Civic Group Leader

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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 pages 4 and 5 of the Recruitment and Retention Plan Sample.*

A fully-defined practice opportunity profile will:

- Help you better understand the strengths and weaknesses of your opportunity.
- Help you better understand the strengths and weaknesses of your community.
- Help you better identify candidates who are a right fit for your organization.
- Help candidates better understand whether your opportunity and community is a right fit for them.

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

Facility Description:

- Organization name and location
- Description of organization's services
- Type of practice setting
- Staff make-up (i.e. number of providers, by profession/department)
- Hours of operation
- Specialist access
- Pharmacy services
- EHR utilized
- Urgent Care
- Satellite clinics

Job Description:

- Scope of practice/job description
- Work schedule
- Call schedule
- Average # of patient visits per day
- Satellite clinic rotation (if applicable)
- Salary and benefit package summary (i.e. salary amount/range, health, life, dental, disability, flex, CME, vacation, loan repayment, etc.)

Candidate Qualifications:

- Educational background desired (degree/licensure/certification)
- Preferred experience
- Technical knowledge and skills required
- Additional training desired
- Desired personal and professional qualities and characteristics

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

- Location
- Demographics
- Economy
- Civic Organizations
- Major Employers
- Education System
- Recreation/Amenities
- Shopping
- Social Networking
- Climate
- Housing

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 and providers. Some programs require the award recipient 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 if you, 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 organization 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 they were to default 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 links where you can learn more about loan repayment and forgiveness programs in your state:

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

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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 your audience(s), 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.*

Recruitment activity expenses can add up quickly, therefore filling positions in a timely manner is extremely important.

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

1. Workplan with Timeline:

Outline a specific timeline and due date for each task and activity. This way, expectations regarding the delivery or performance of each activity are 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.

2. 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 workplan 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 pages 7 and 8 of the Recruitment and Retention Plan Sample.*

3. Determine Target Audience(s):

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.
- Consider how your target audience(s) prefer to receive information so you can choose the most effective communication channels. For example,

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younger generations may be more receptive to communicating electronically and by 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.

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
- Exhibits
- Organizational website
- Education program visits
- Social media

Interview Questions

Health care professions have very different qualifications and types of professional expertise, therefore it's important that interview questions are relevant to each profession specifically. Questions should be designed to draw out necessary skills and qualities important to each profession.

Some 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

See Interview Questions Sample on page 9 of the Recruitment and Retention Plan Sample.

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FOLLOW-UP AND FOLLOW-THROUGH (RETENTION)

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 workplan. *See Orientation and Onboarding Work Plan Sample on pages 10 and 11 of the 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 via department, organization website, organization newsletter, newspaper, 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/satellite clinics, 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, building keys, department phone number, email address and passwords as necessary.
- Mentor introductions to new hire and spouse/family, along with provide weekly lunch meetings schedule.

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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 new hire employment (if applicable).
- Holds quarterly meetings for first year to gather feedback on organization and community integration, job duties/work schedule, and problems/questions.
- Implements 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 establishing new programs or considering various new employee offerings and can also be activities that may need to be done on an annual basis. Some of these activities may include:

- Establishing a spouse/family mentor program
- Establishing a staff recognition program
- Organization becomes a clinical preceptor/clinical site
- Performs environmental scans of state/regional salary and benefits to maintain competitiveness
- Determines if there are state/federal health care professional/student loan forgiveness programs available

Employee Performance Agreement and Annual Review

Performance agreements between an employ and the organization are used to define accountability for specific organizational goals, help employees align their daily activities with those goals, and will lead to improved overall employee satisfaction and positive organizational results. When the organization aligns employee performance agreements with its goals, they can better understand the connection between their daily activities and goals. *See Employee Performance Agreement Sample on page 13 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 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 14 of the Recruitment and Retention Plan Sample.*

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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. 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.

Examples of key measures may include:

- Employee satisfaction
- Retention of new hires
- Success of marketing venues
- Success of mentor programs
- Implementation of new programs/processes
- Success of orientation and onboarding process

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RESOURCES

Recruitment and Retention Plan Toolkit

Rural Health Innovations

<https://www.ruralcenter.org/network-ta/resources/recruitment-and-retention-planning-rural-health-networks-and-members>

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>

Evaluation Plan Toolkit: Allied Health Training Network Program

Rural Health Innovations

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