



WELCOME!

EXPLORING AND USING THE RECRUITMENT & RETENTION PLAN TEMPLATE
WEBINAR 3: DESIGNING A SUCCESSFUL RECRUITMENT PROCESS THROUGH PLANNING
DECEMBER 13, 2016
2:00-3:00PM ET

STAR² CENTER

- www.chcworkforce.org | 844-ACU-HIRE
- Allison Abayasekara | Director, Training & Technical Assistance
 - aabayasekara@clinicians.org
 - 703-562-8820
- Mariah Blake | Staff Assistant
 - mblake@clinicians.org
 - 703-562-8819

WEBINAR HOUSEKEEPING

We are
Recording

Ask
Questions

Have Fun

PRESENTER

- Paddy DiPadova | Senior Health Care Consultant, John Snow, Inc.
- Pamela Byrnes | Senior Consultant, John Snow, Inc.

AGENDA

- Introduction to Health Center Provider Retention and Recruitment Plan Tools
- Part III: Designing A Successful Recruitment Process Through Planning

STAR² CENTER RECRUITMENT & RETENTION PLAN TOOLS

Purpose:

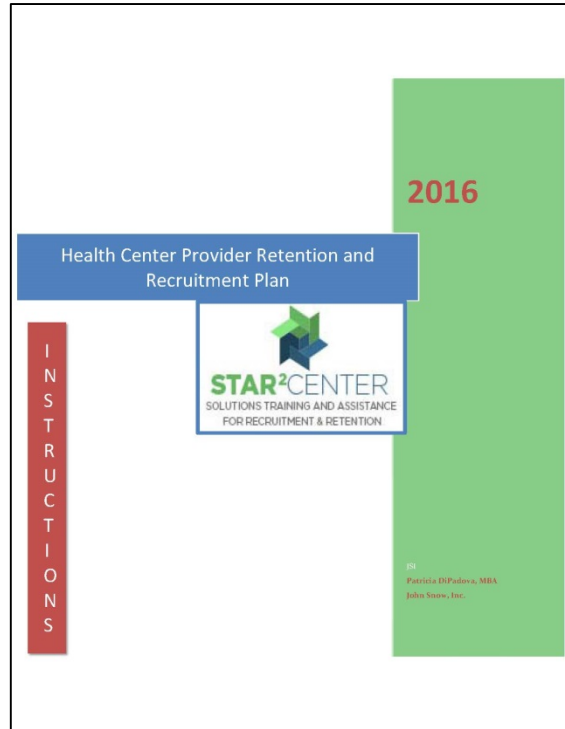
Assist health centers in developing a written Retention and Recruitment plan. The Retention and Recruitment Plan Template provides a structure and thought process for improving retention and recruitment practices.

<http://www.chcworkforce.org/acu-health-center-provider-retention-and-recruitment-plan-template>

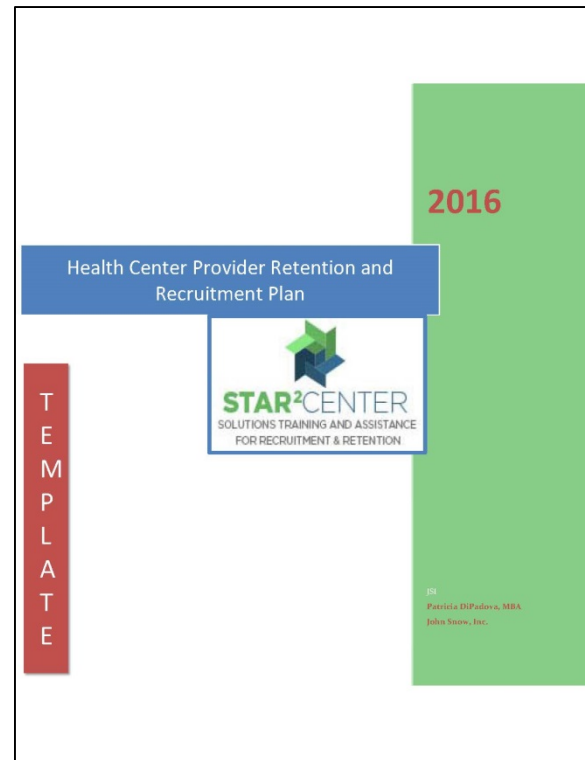


HEALTH CENTER PROVIDER RETENTION & RECRUITMENT PLAN TOOLS

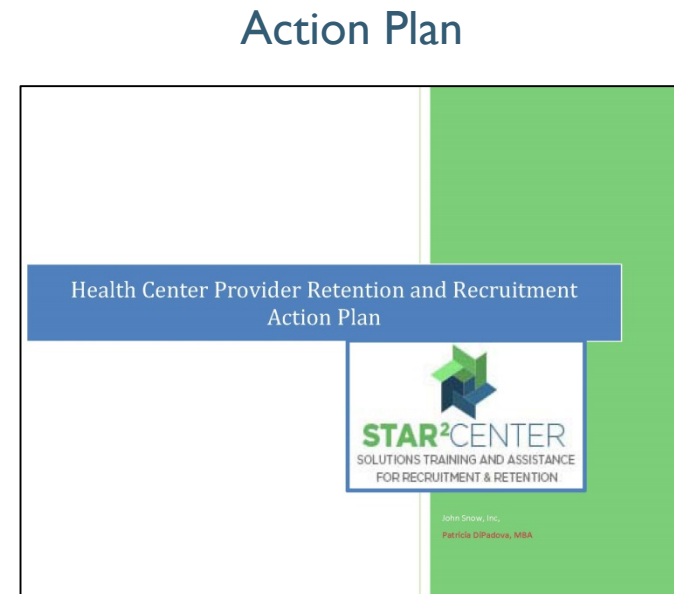
Health Center Provider Retention & Recruitment Plan Tools



Instructions

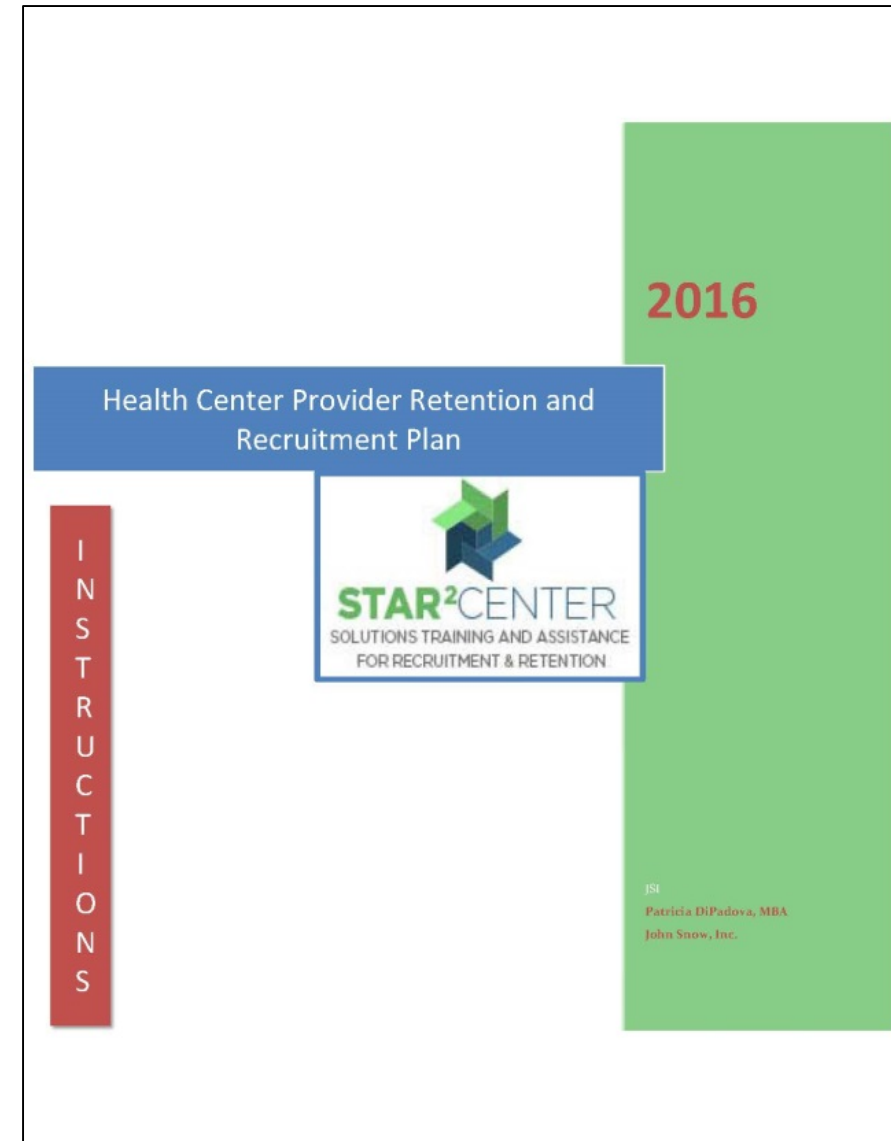


Template



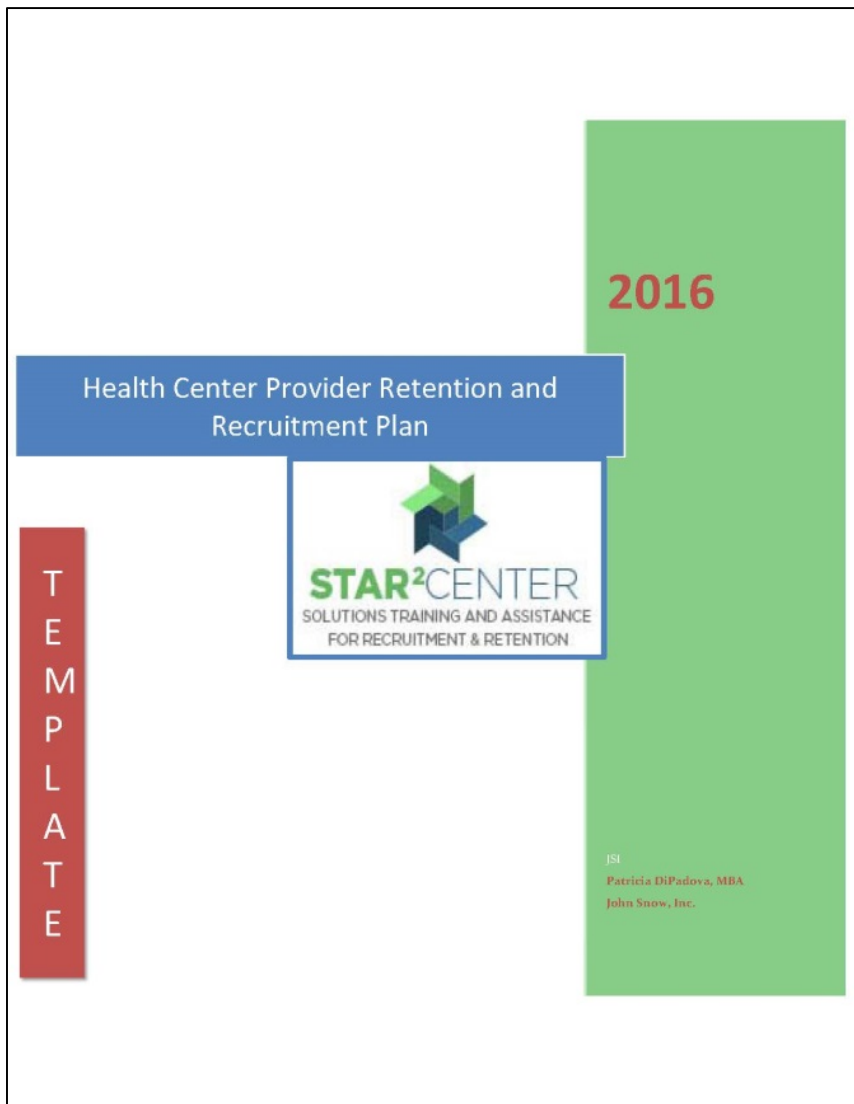
INSTRUCTIONS

- How to use the Retention and Recruitment Template and the Action Plan Documents
- Rationale for each element
- Benchmark data
- Examples



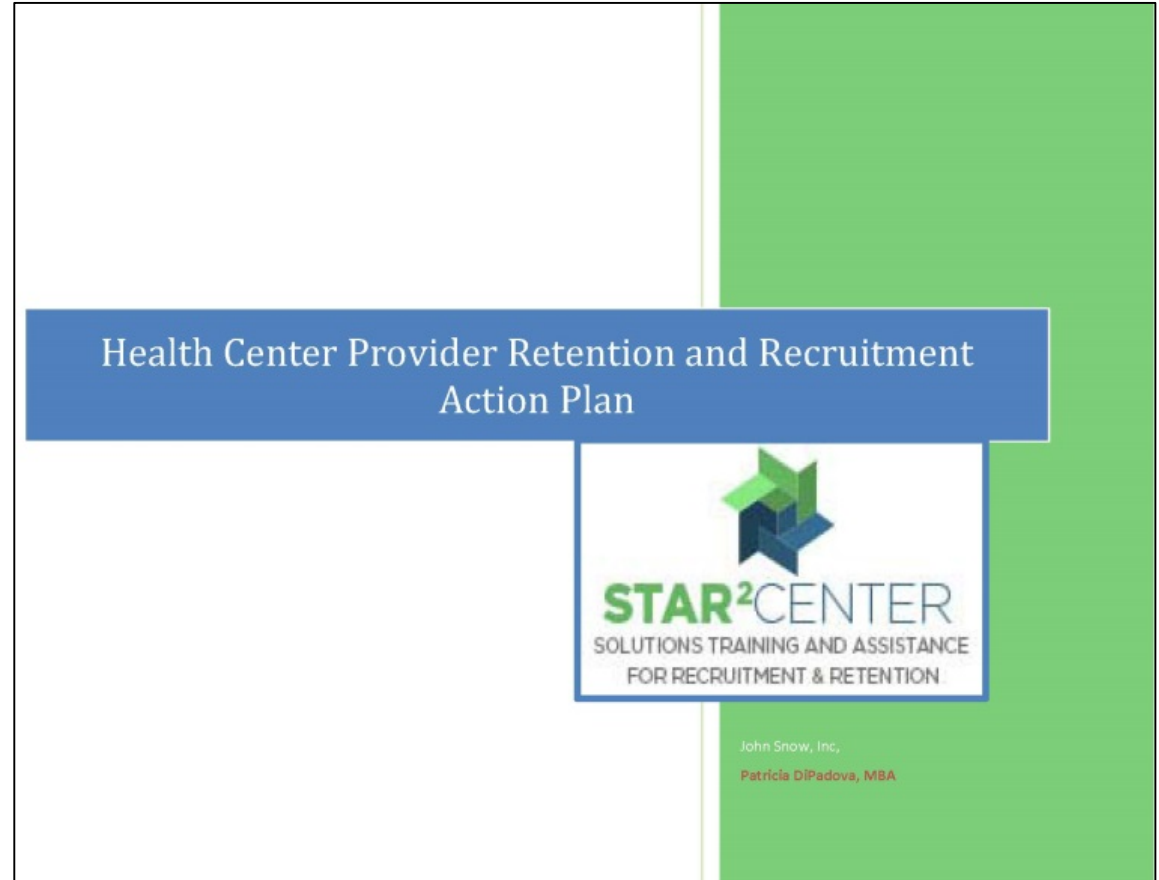
TEMPLATE

- Modify and save as your own plan
- Main body of document – MS Word
- MS Excel tracking form

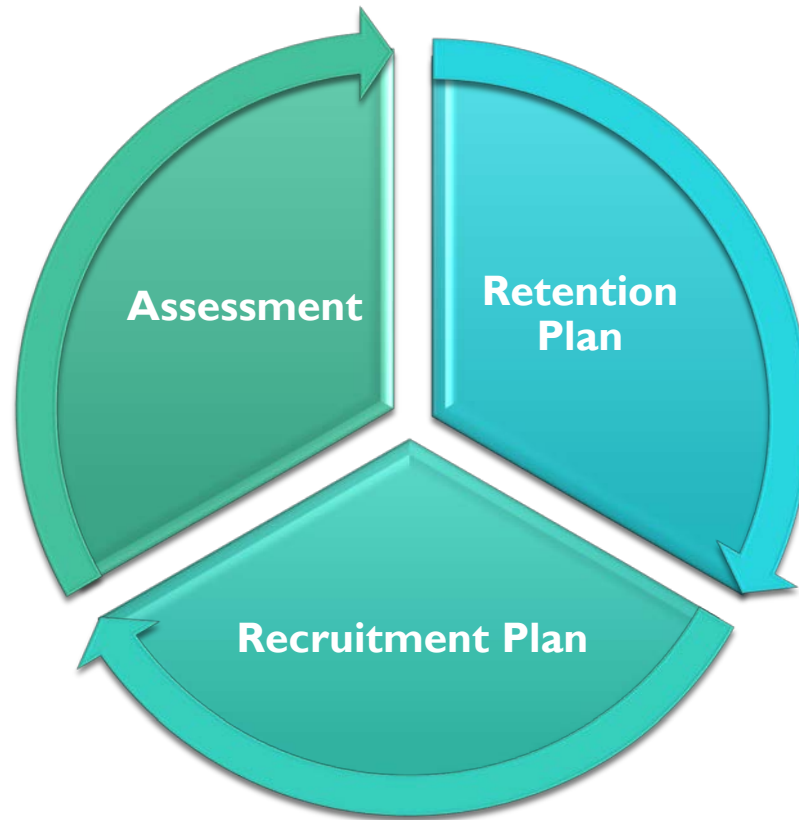


ACTION PLAN

- Keep track of gaps and opportunities
- Identify strategies for improvement
- Create a timeline for completion



MAIN SECTIONS OF R&R PLANNING TOOLS



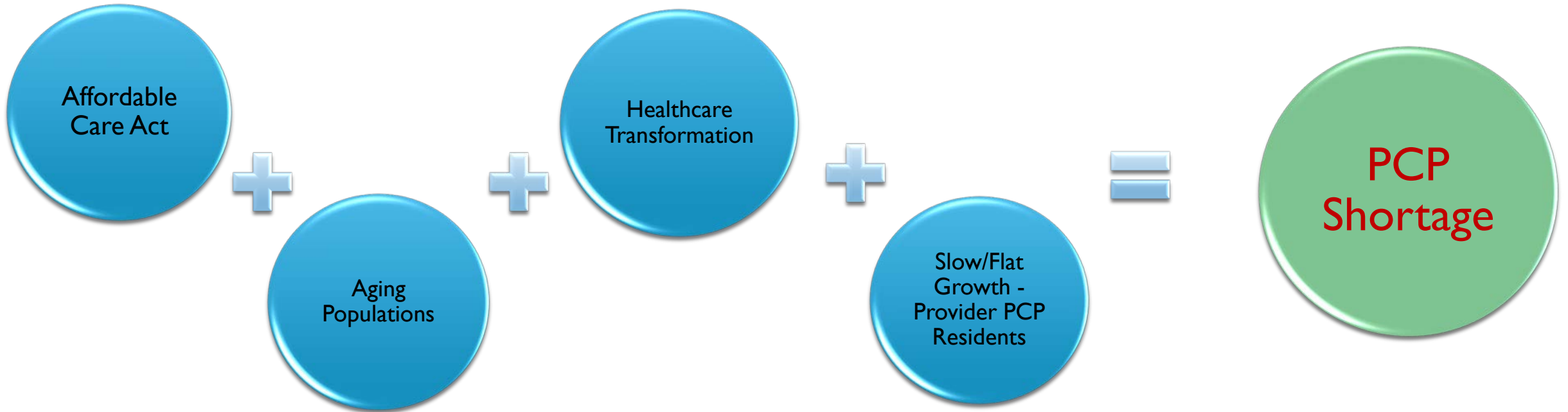


DESIGNING A SUCCESSFUL RECRUITMENT PROCESS THROUGH PLANNING

POLL QUESTION



THE CURRENT ENVIRONMENT = EXTREME COMPETITION



BEFORE YOU RECRUIT LAY THE GROUNDWORK TO MAXIMIZE RECRUITMENT EFFORTS

Practice Assessment – See what you can improve in the practice environment

- Efficient, high quality practice serving patients needs

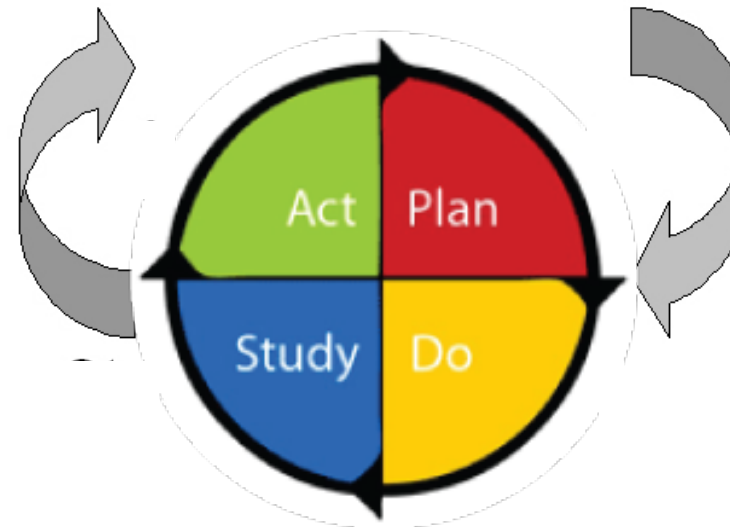
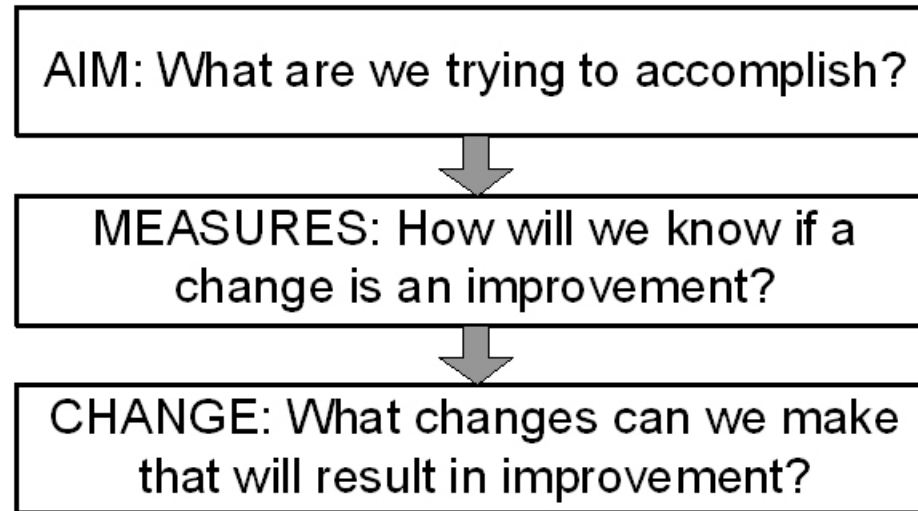
Retention Planning – Review efforts to ensure provider satisfaction

- Providers who are valued, obtain optimal achievement, work-life balance

Candidates will be drawn to a
happy, high functioning practice

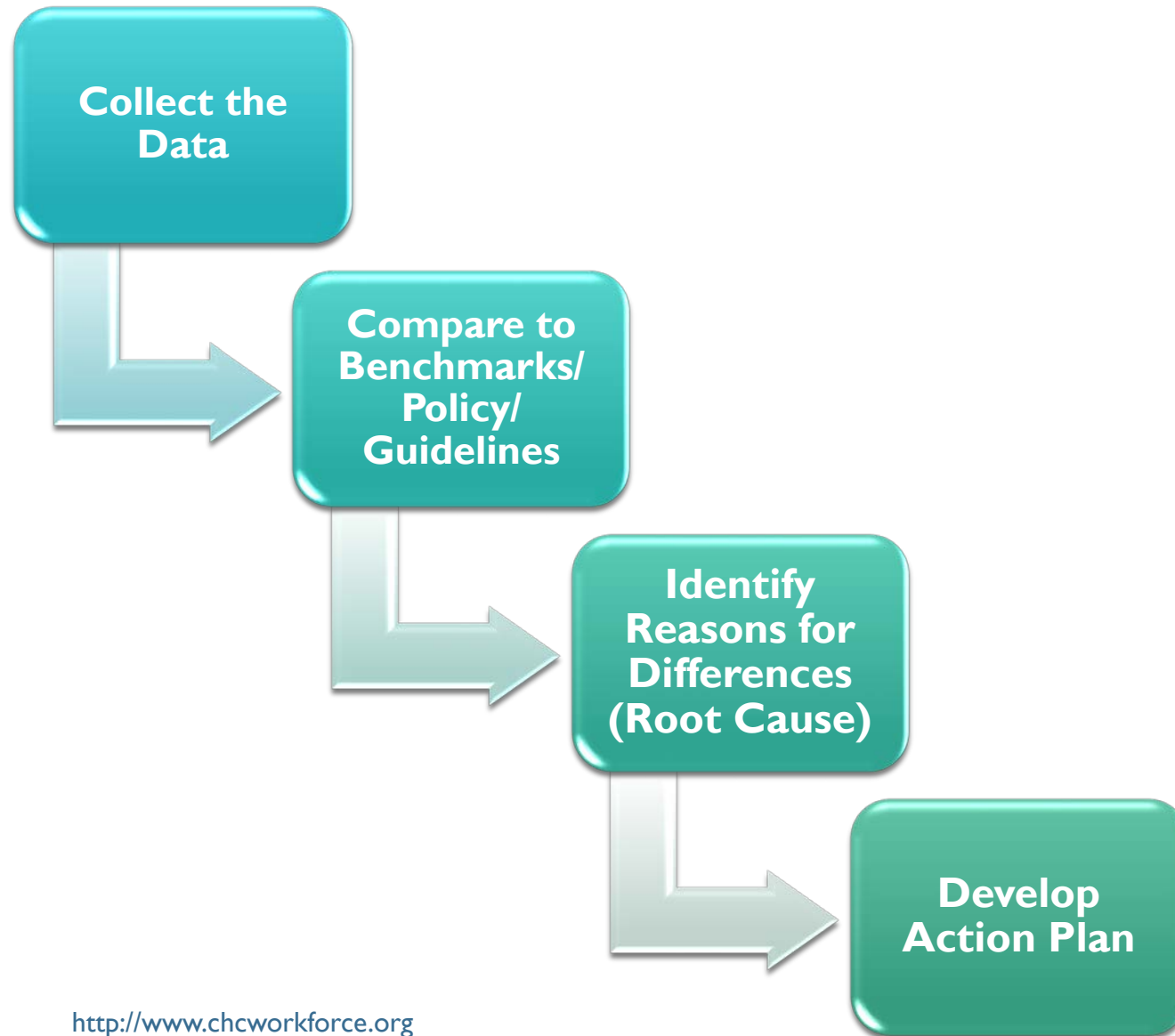


THE MODEL FOR IMPROVEMENT



**Testing ideas
before
implementing
changes**

PLANNING



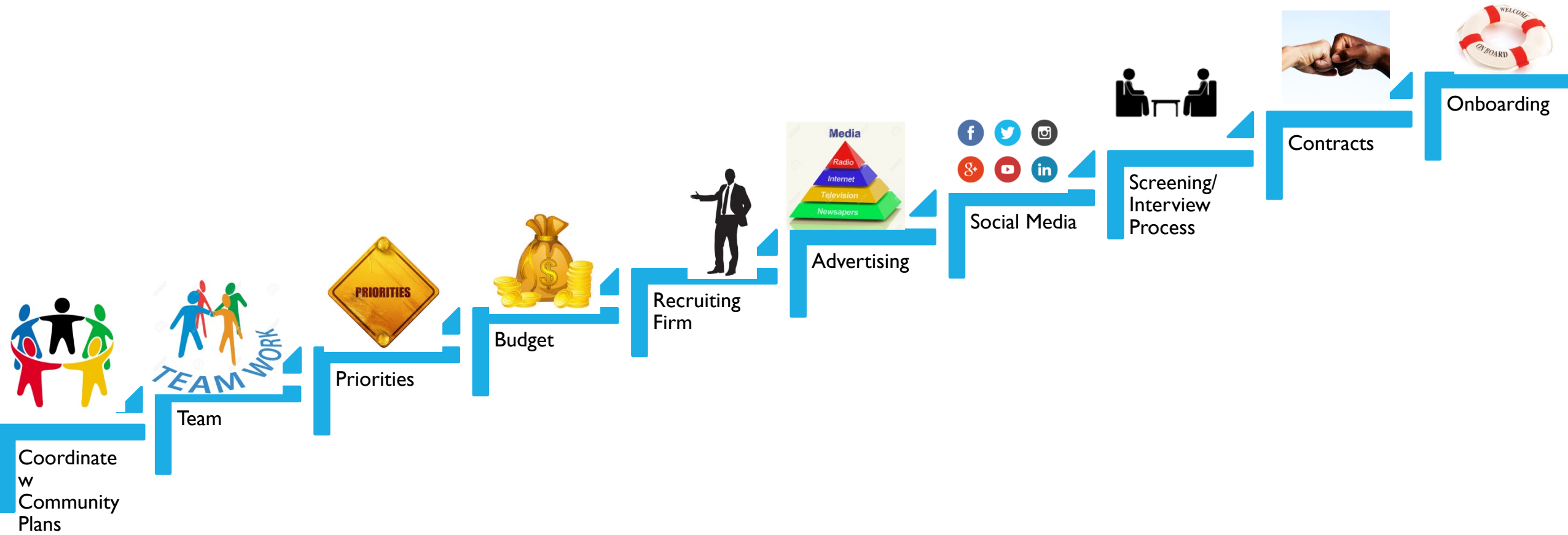
ACTION PLAN DETAIL

Recruitment

Health center recruitment efforts with identified gaps or barriers, opportunities and strategies for unmet needs.

Recruitment	Gaps/Barriers	Opportunities	Strategies for Improvement	Timeline
Community Recruitment Plans				
Recruitment Team				
Recruitment Team Roles and Responsibilities				
Recruiting Priorities				
Recruitment Budget				
Recruitment Firm				
Advertising				
Strategies for Use of Social Media				

RECRUITMENT PLANNING PROCESS



IDENTIFY AND ASSESS COMMUNITY RECRUITMENT PLANS

- Regional planning initiatives
 - Find out about them and get involved
 - Hospitals
 - Other Providers
- Identify opportunities for collaboration
 - Share providers
 - Share recruitment costs



DEFINE THE RECRUITMENT TEAM AND ASSIGN ROLES

- Create the Team in advance
 - Can act more quickly with new candidates
- Have decision makers at the table
- Establish clear roles and responsibilities
 - Keep in mind
 - Stake in the recruitment
 - Availability
 - Respective skills



SAMPLE RECRUITMENT TEAM MEMBERS AND CORRESPONDING RESPONSIBILITIES

Position	Responsibilities
Chief Medical Officer	With CEO define position, Contribute to draft ad, Assist with screening calls, Final interviews, Visit dinner event
Administrator/CEO	With CMO define position, Contribute to draft ad, Assist with screening calls, Final interviews, Visit dinner event
Recruitment Staff (may not have this title, but need to appoint someone in this role)	Coordinate with recruiting firm (if any), Draft final ad and coordinate with media and social media outlets, Screening calls, Coordinate all parts of visit and interviews, Track candidates, Develop and negotiate contracts, Assist with moving arrangements and community connections (schools, partner employment)
Provider Team Members	Input defining position, Contribute to draft ad, Final interviews and visit events as necessary
Clinical Support Staff	Part of site tour and informal interviews during visit
Administrative Staff	Support Recruitment Staff, Potentially part of site tour and informal interviews during visit
Community Member	Potentially part of final interviews, Visit dinner event
Provider Team Spouse	Provide assistance and support to candidate partners/families, Lunch with partner

SET RECRUITING PRIORITIES

- Define a “big picture” written set of priorities
- Use info from the Practice Assessment and Strategic Planning process to identify
 - Positions to be filled
 - Realistic timelines for completing the recruitment process
 - Plan about 124 days or 6 months for a primary care physician
 - Plan about 95 days or 3 months for an Advanced Practice position (NP)
- Plan out as far as you have information, at least 3 – 5 years
- Update as new information becomes available



Source: ASPR Benchmarking Survey

PROVIDER RECRUITMENT PRIORITIES

Position	FTE	Replacing	FTE	New Position	Reason					Date	
					Current Vacancy	Planned Vacancy	Retirement	Growth	Other	Anticipated Need	Begin Recruiting Process
NP	.75	Susan Smith, MD	.5	No	X					ASAP	3/16
FP	1.0			X				X		6/17	6/16

DEVELOP RECRUITMENT BUDGET

- Get approval and leadership support for a realistic recruitment budget
- For assistance making budget estimates

STAR² Center Financial Assessment Tool

<http://www.chcworkforce.org/star%C2%B2-center-financial-assessment-tool>



Staff Costs (Planning, Recruiting, Onboarding)	
Business Office (Patient Accounts/Billing) Salary and Benefits per Hour	
CEO/Administrator Salary and Benefits per Hour	
Chief Medical Officer Salary and Benefits per Hour	
Human Resources Salary and Benefits per Hour	
IT Hourly Rate plus Benefits	
Nurse/MA Hourly Rate plus Benefits	
Other Providers Average Hourly Rate plus Benefits	
Support Staff Salary and Benefits per Hour	
Total Salaries/Benefits	
Outside Recruiting Expenses	
Recruiting Service	
Advertising Costs (2 national journal print ads, 1 national online service x 3 months)	
Total Outside Recruiting Expenses	
Interview Expenses	
Number of In-Person Interviews	
Hotel Expense per Night per Interview	
Travel Expense per Interview	
All Staff Breakfast with Candidate per Interview	
CMO Lunch with Candidate per Interview (incl. candidate and guest)	
Number of People Included in Interview Dinner per Interview	
Interview Dinner Cost per Person per Interview, (incl. tax and gratuity)	
Cost of Other Interview Items (such as gift baskets, baby sitting service)	
Total Cost Per Interview	
Total Interview Expenses (# of Interviews X Total Cost per Interview)	
Hiring Expenses	
Relocation Costs	
Signing Bonus	
Publicity Costs	
Other Costs, i.e. cell phone, lab coat	
Total Hiring Expenses	
Total Recruitment Budget	

DECIDE ON RECRUITING FIRM (IF ANY)



- Buy or Build decision
 - Contract with a professional recruiter
 - Do the work with existing staff
- Get referrals & check references
- Document/Log rating information for future reflection and decisions
- Request a discount for health center status

Contact Name	Phone	Email	Address	Fees	References	Date Last Used	Position Filled	Rating 1-5

DEVELOP ADVERTISING

- Plan and track all advertising
 - done directly by your health center
 - by a recruiter
- Record differences from plan
- Utilize sources that are familiar with
 - Health center recruiting issues and
 - Working with mission driven organizations and
 - Working with providers looking for a mission driven organization
- Post positions with state, regional, and national agencies including
 - Primary Care Organizations (PCOs) and Primary Care Associations (PCAs)



MEDIA OUTLET INFORMATION

Media Outlets	Contact Name	Phone	Email	Timing	Frequency (Ongoing?)	Fees	Rating 1-5
National Journal Print Ads							
Journal 1							
Journal 2							
Journal 3							
Primary Care Organization (PCO)							
Primary Care Association (PCA)							
NHSC Job Center							
Regional Advertising (specify)							
Online Recruitment Site Service							
Health Center Website							
Other							

AD TEXT

Title	
Body <ul style="list-style-type: none"> ○ Type of organization recruiting ○ Location ○ Statement of position type, FT or PT ○ Promote mission driven health center environment ○ Brief description of the positive aspects of the region <ul style="list-style-type: none"> ▪ i.e. If urban, cultural opportunities; if rural, outdoor/nature experiences ○ Promote any positives, such as flexible schedules, teaching opportunities ○ Include any recognition, such as PCMH ○ Include possible incentives, such as professional development benefits, bonuses, relocation expenses 	
Contact Person and Information	

- Draft a generic ad in advance
- Include template in the plan
- Review ad each time it is used to make sure it is updated and meets the health center's needs

DEVELOP STRATEGIES FOR USE OF SOCIAL MEDIA

- Good way to attract younger candidates and residents
- Need to go beyond practice website
- Set up LinkedIn Company Profile and establish broad provider connections
- Establish and maintain an updated Facebook Page for the health center
- Use YouTube Videos to introduce your facility to potential candidates
- Consider starting a Blog connected to your other social media outlets
- Ensure your health center website has essential community links



USE OF SOCIAL MEDIA

Social Media	Use (Y/N)	Assessment	Action Plan
Website			
Use for Job Posting			
Highlights of HC Community Links			
Linked-In Company Profile			
Twitter (see instructions)			
HC Facebook Page			
Use for Job Posting			
Highlights of HC Community Links			
YouTube Videos			
HC Highlights			
Regional Highlights			
Blogs			

DESIGN CANDIDATE SCREENING AND INTERVIEW PROCESS

- Track screening and interviewing activities
- Rely on team and previously determined roles and responsibilities
- Screen CVs or applications received online
- Telephone interviews
- Visit(s)

- **FOCUS ON QUICK RESPONSE TIMES AND MINIMAL LAGS BETWEEN ACTIVITIES**



CANDIDATE TRACKING SHEET

- Microsoft Excel Document available with Retention and Recruitment Plan Tools

Candidate Information									Application Received			Telephone Interview (within 5 days)				Follow up Telephone Interview			1st Visit		2nd Visit		Offer Extended		
First	Last	Street Address	City	State	ZIP	Email	Home Phone	Cell Phone	Date	Mechanism	Referred by (if applicable)	Date	Conducted by	Source*	Outcome	Date	Conducted by	Outcome	Date	Outcome	Date	Outcome	Date	Outcome	
										(mail, email, online- specify which online method or source)					(visit extended, follow up telephone interview, wait and see, will not pursue)										

TELEPHONE INTERVIEW CONTENT

- Describe the position
- Describe the health center, the town/region, and approximate salary
- Ask:
 - How did you hear about the position?
 - Why are you interested in this position?
 - Do you have any special clinical interests?
 - Are there clinical procedures or types of patients/conditions you are not comfortable with?
 - Is there anyone you need to take into consideration during your search (spouse/partner)?
 - Do you have any malpractice history?
 - Is there any reason you wouldn't be able to get credentialed?
 - Do you have any employment gaps?
 - Did you change training programs and/or specialty?
 - Do you have any inactive licenses?
- Field questions from the candidate.
- Discuss the health center recruitment process and next steps.



NEXT STEPS

- Record the interaction for later review by the Recruitment Team
- Review the candidate's CV and make sure he/she is board eligible
- Present results to the Recruitment Team
- If the Recruitment Team thinks the candidate is a good fit, check references, and then arrange a visit
- If there are further questions, arrange a second telephone interview with the appropriate person

THE VISIT

- 1 – 2 visits
 - Candidate
 - Candidate and Family
- DO NOT DELAY
 - Lag times can lead to lost candidates
- Choose the best accommodations and restaurants – this is not the time to skimp
 - Assign a key staff person to guide candidate
 - Assign key staff person to guide candidate’s partner
 - Don’t forget to make an impression on any children visiting

Item	Details	Responsible or Lead Person	Date Finalized
Arrange Logistics 2-3 days			
Travel – flights, ground transportation			
Reserve hotel			
Gift Baskets – if children are coming, include age appropriate toys			
If children attend: Babysitting service			
Create & distribute itinerary			
Provide directions & maps			
Visit			
Pick up at Airport			
Provider Itinerary			
Breakfast with Staff (support staff included)			
Tour of Site(s)			
Visit Hospital/Hospital Administration			
Meet with Providers, Provider Team			
Meeting with CEO			
Review of Contract/Benefits/etc			
Lunch/meeting with CMO			
Partner Itinerary			
Schools			
Child Care Providers			
Banks			
Realtors			
Lunch with community member(s)			
Local recreational facilities & sights			
Meetings with Potential Partner Employers			
Joint Itinerary			
Dinner with key providers, administration and partners/spouses			
Attend cultural performances			

CANDIDATE FOLLOW UP

- Again – DO NOT DELAY
- Make a Follow Up Plan in advance
 - Specific timelines
 - Team Assignments of responsibilities

Sample Candidate Follow Up Plan

Stage (F/U after each event)	Frequency	Timeline	Type of Contact	Responsible Person
Application Received	Min. of up to 5 attempts	Within 5 work days	Email, telephone	Administrative Assistant
1st Telephone Interview	Min. of up to 5 attempts	Within 5 work days	Email, telephone, mail	CMO
2nd Telephone Interview (if applicable)	Min. of up to 5 attempts	Within 5 work days	Email, telephone	Provider conducting 2 nd interview
1st Visit	Min. of up to 10 attempts	Within 5 work days	Email, telephone, mail	CMO
2nd Visit (if applicable)	Min. of up to 5 attempts	Within 5 work days	Email, telephone, mail	Recruiting Staff or HR
Offer	Min. of up to 10 attempts	Within 10 work days	Email/ Telephone and mail	CEO

DEVELOP PROVIDER CONTRACTS AND PREPARE NEGOTIATION STRATEGY

- Develop prior to the first telephone interview.
- Update the contract as necessary and document in plan
- Be prepared to discuss the general contract terms during calls and specifics during a candidate visit



CONTRACT TERMS CHECKLIST

Work Expectations

- Clinical office hours
- Administrative responsibilities
- Call schedule
- Office sites

Compensation

Details of Incentive Compensation (if applicable)

- Base Salary
- Incentives for production (revenue, visits or RVU based) including goals
- Incentives for quality, including metrics
- Incentives for patient satisfaction, including goals
- Incentives for internal administrative task completion, including expectations
- End of year bonus

Benefits

- Vacation
- Holidays
- Sick
- Health Insurance
- Dental Insurance
- Life Insurance
- Disability Insurance
- Retirement Plan

Professional Development

- Educational Leave
- Educational Travel
- Educational Conference or Other Required Educational Expenses
- Moving Expenses
- Signing Bonus
- Other benefits such as sabbatical leave

ONBOARDING

Provider onboarding is the process of integrating a provider into the practice

- Sets the tone for the practice
- Can be a large contributor to Provider Retention through
 - Greater communication
 - Greater provider satisfaction



COMMON ONBOARDING ACTIVITIES

- Licensing
- Credentialing
- Hospital medical staff privileges
- Third party insurance enrollment
- Appointment scheduling set up
- IT issues and training on systems
- Human Resources
- Training on how to obtain needed clinical consults, tests, and support for patient care
- Defining expectations for productivity, quality, and work effort
- Organizational orientation/Introduction to culture
- Marketing
- Community orientation
- Policies/Procedures
- Ancillary departments
- QI/Clinical review

Source: New Hampshire Vermont Recruitment Center of the Bi-State Primary Care Association



TIPS FOR SUCCESSFUL ONBOARDING

- Assign a mentor to orient the new provider and help integrate him or her into the medical community.
- Assign a person and realistic timeline to each onboarding activity to ensure accountability.
- Set expectations for the new provider regarding getting out in to the community and meeting other members of the group and medical staff.
- Conduct weekly check-in calls prior to provider beginning practice.
- Conduct weekly check-in meetings as soon as the provider begins at the practice, to be tapered off to bi-monthly and monthly over the first few months.
- Provide opportunities for peer interaction outside the community.
- Develop telecommunication links to practitioners in other communities and to medical education and support resources.

Source: New Hampshire Vermont Recruitment Center of the Bi-State Primary Care Association

OTHER TOPICS

- Patient Centered Medical Home and Team-Based Care
- National Health Service Corps
- State Loan Program Participation
- Medical Education Connections through Residency Programs



Federal and State Loan Repayment Programs

- Federal and state programs exist to assist primary care clinicians (medical, dental, behavioral health) who elect to work in a health professional shortage area (HPSA) in out/patient setting
- Medical primary care defined as Family, Internal, OB/GYN, Pediatrics, Geriatrics, Med-Peds, Psychiatry
- Clinicians include MD/DO, Dentists, Nurse Practitioners, Certified Nurse Midwives, Physician Assistants, Psychologists, MSWs



POLL QUESTION



WRAP UP

- Get your house in order (Assessment and Retention)
- Plan ahead for vacancies
- Identify gaps in the plan
- Assist in developing an improvement plan and strategies for successful recruitment



NEXT STEPS

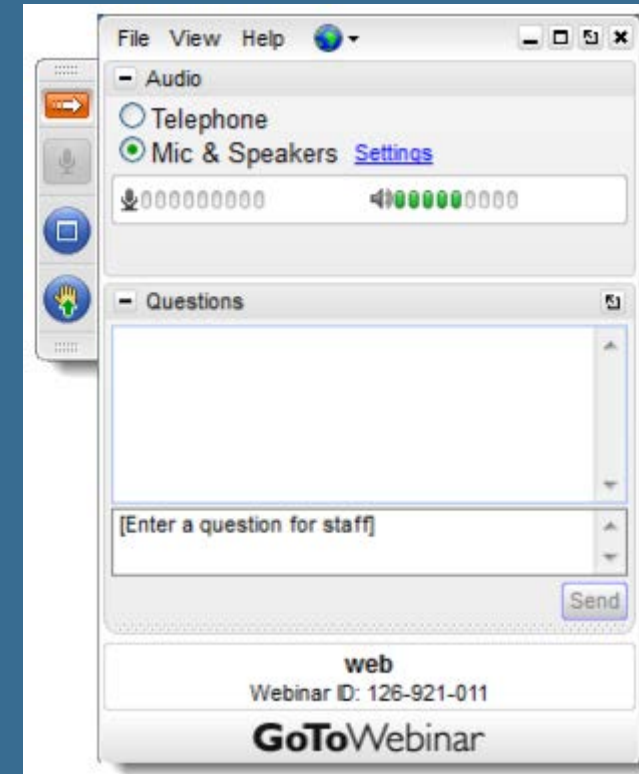
Complete Recruitment Plan

1. Work with Recruitment Team
2. Develop Plan
3. Communicate results to Practice Team
4. Develop Action Plan
5. Implement Action Plan
6. Update Retention Plan

Contact STAR² Center

1. Resources
2. Answer questions
3. Request Individual Technical Assistance

- Questions?
 - Raise your hand
 - Use the chat & questions boxes
 - Email mblake@clinicians.org





THANK YOU!