ACU's STAR Center

Comprehensive Workforce Plan Workshop

CHOOSE YOUR OWN WORKFORCE ADVENTURE!

MAY 1-2 | NASHVILLE, TN

ACU
ASSOCIATION OF CLINICIANS
FOR THE UNDERSERVED

STAR²CENTER
SOLUTIONS TRAINING AND ASSISTANCE
FOR RECRUITMENT & RETENTION

Day 2:
Recruitment

TODAY'S AGENDA

Thursday, May 2: Recruitment

9:00-9:15AM: Day 1 Recap, Reflections, & Icebreaker

9:15AM-12:15PM *(includes break)*: Topics in Recruitment

    9:15-10:15AM: **Community & Team** OR **Succession & Workforce Planning** OR **Recruitment Budget**

    10:15-10:30AM Break

    10:30-11:00AM: **Community & Team** OR **Succession & Workforce Planning** OR **Recruitment Budget** Breakouts

    11:00-11:40AM: **Job Descriptions** & **Interviewing**

    11:40-11:45AM: Break

    11:40AM-12:15PM: **Job Descriptions** OR **Interviewing** Breakouts

12:15-1:15PM: Lunch

1:15-3:30PM: Onboarding

    1:15-2:15PM: Onboarding for Success

    2:15-2:30PM: Break

    2:30-3:30: Onboarding Cont'd

3:30-4:00PM Wrap Up

You are here!

DAY 1 RECAP & ICE BREAKER

DAY 1 RECAP

- Comprehensive Workforce Plan Components

- JEDI & Wellness Lenses

- Practice Assessment

- Retention
  - Mission
  - Compensation
  - Benefits
  - Work Schedules
  - Career Paths & HP-ET

QUESTIONS

ICE BREAKER

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menti.com
4718 9102

RECRUITMENT

RECRUITMENT PLANNING
Key Areas

Community

Team

Priorities

Budget

Recruiting Firm

Advertising

Social Media

Interviews

Contracts

Onboarding

COMMUNITY

COMMUNITY RECRUITMENT PLANS

What's working for you | What's working against you

COMMUNITY PARTNERS

- Hospitals
- Other providers in the area
- Schools
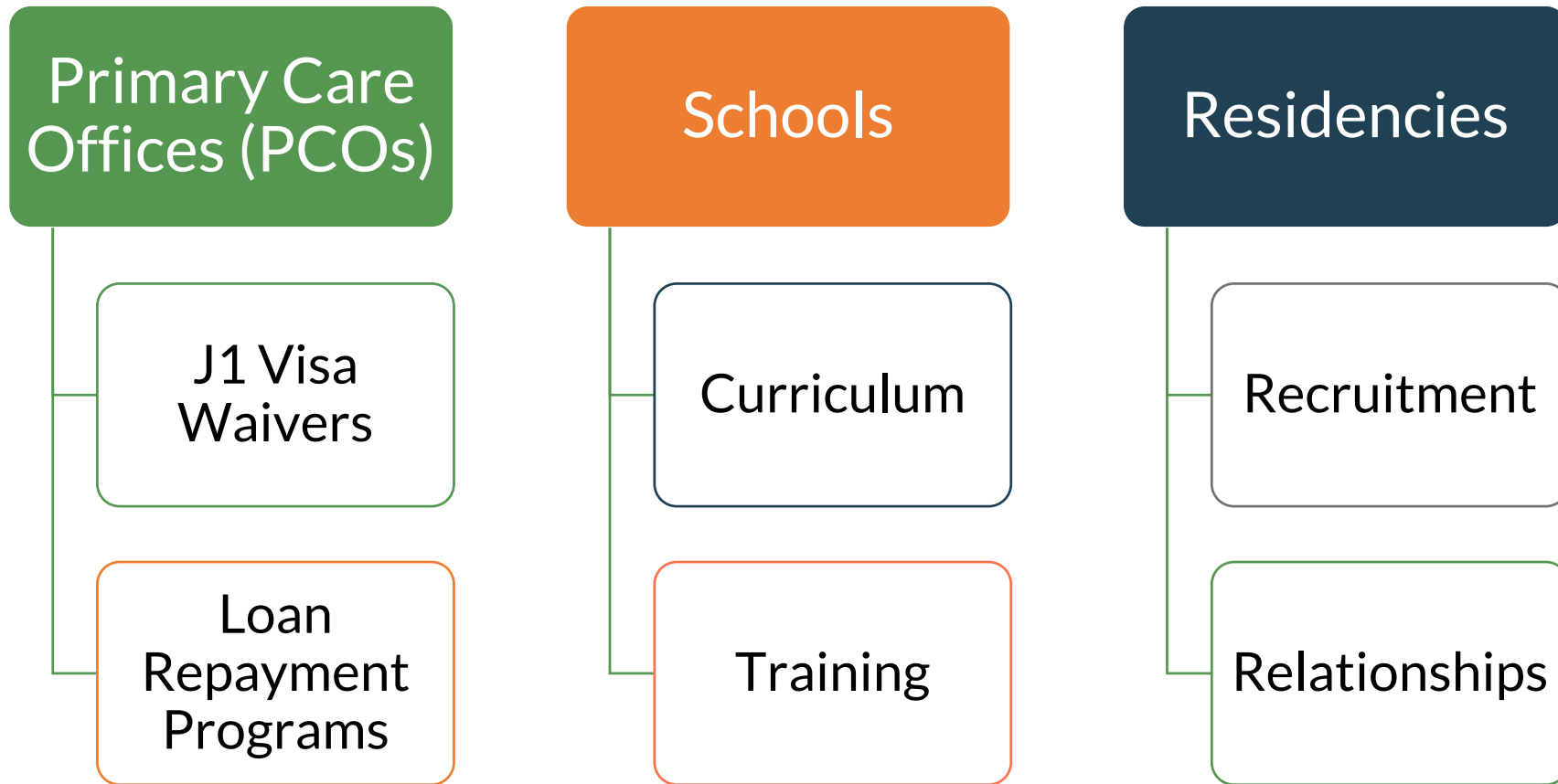- Residencies
- State offices

COMMUNITY PLANS

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

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IDENTIFY COMMUNITY PARTNERS

Primary Care Offices (PCOs)
- J1 Visa Waivers
- Loan Repayment Programs

Schools
- Curriculum
- Training

Residencies
- Recruitment
- Relationships

DON'T FORGET THE REST OF THE COMMUNITY!

School System

Chamber of Commerce

Local Economy (e.g. real estate)

Other Nonprofits/CBOs

- Who else benefits when you successfully recruit a clinician?
- Who else has resources to help you?

Maximize what's working for you | Minimize what's working against you
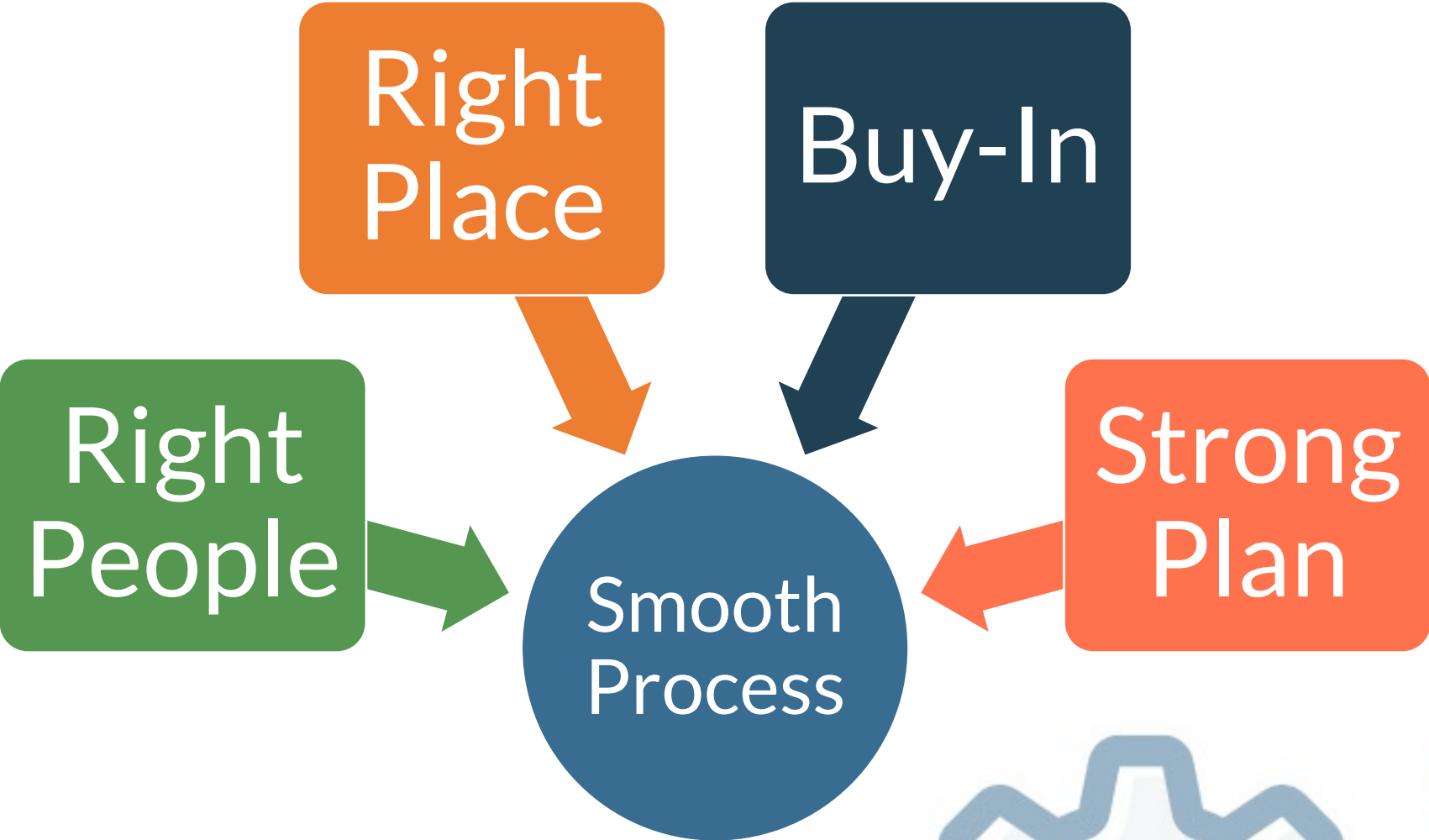
RECRUITMENT TEAM

RECRUITMENT TEAMS

Who is best suited to doing which tasks?

Where are the gaps?

RECRUITMENT TEAM

Put team together in advance

Allow input early on

Remember team must act quickly

RECRUITMENT TEAM ROLES

Establish clear roles

Establish responsibilities

Understand availability and skills

TYPES OF ROLES

Defining position

Working with community partners

Communicate throughout all of this! →

Sourcing candidates

Screening & interviewing

Managing internal logistics

CWP TABLE 12

Position	Responsibilities
CMO	With CEO, defines position, contributes to drafting ad; assists with screening calls; final interviews; visit dinner event
CEO/Administrator	With CMO, defines position; contributes to draft ad; assists 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 (e.g., schools, partner employment)
Provider Team Members	Input defining position; contributes to drafting 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 Partner	Provide assistance and support to candidate partners/families; lunch with partner

Match the people with the tasks | Make a plan for dealing with gaps

Table 12. Recruitment Team Members & Corresponding Responsibilities (Medical Example)

Position	Responsibilities
*add the title of the HC employee involved in the recruitment team	*list out the employee's responsibilities in the recruitment process; different for each person

PRIORITIES & BUDGET

RECRUITMENT PRIORITIES
What Matters and Why?

- Define a "big picture" written set of priorities
- JEDI is essential
- Use information from your organizational strategic plan
  - Identify open or soon to-be open positions
  - Identify realistic timelines for completing the recruitment process
- Update as new information becomes available

RECRUITMENT PRIORITIES
Things to Consider

Open Positions (Immediate Vacancies)

Reason for Vacancies

Length of Time to Fill Position

Anticipating Vacancy Needs (3-5 years)

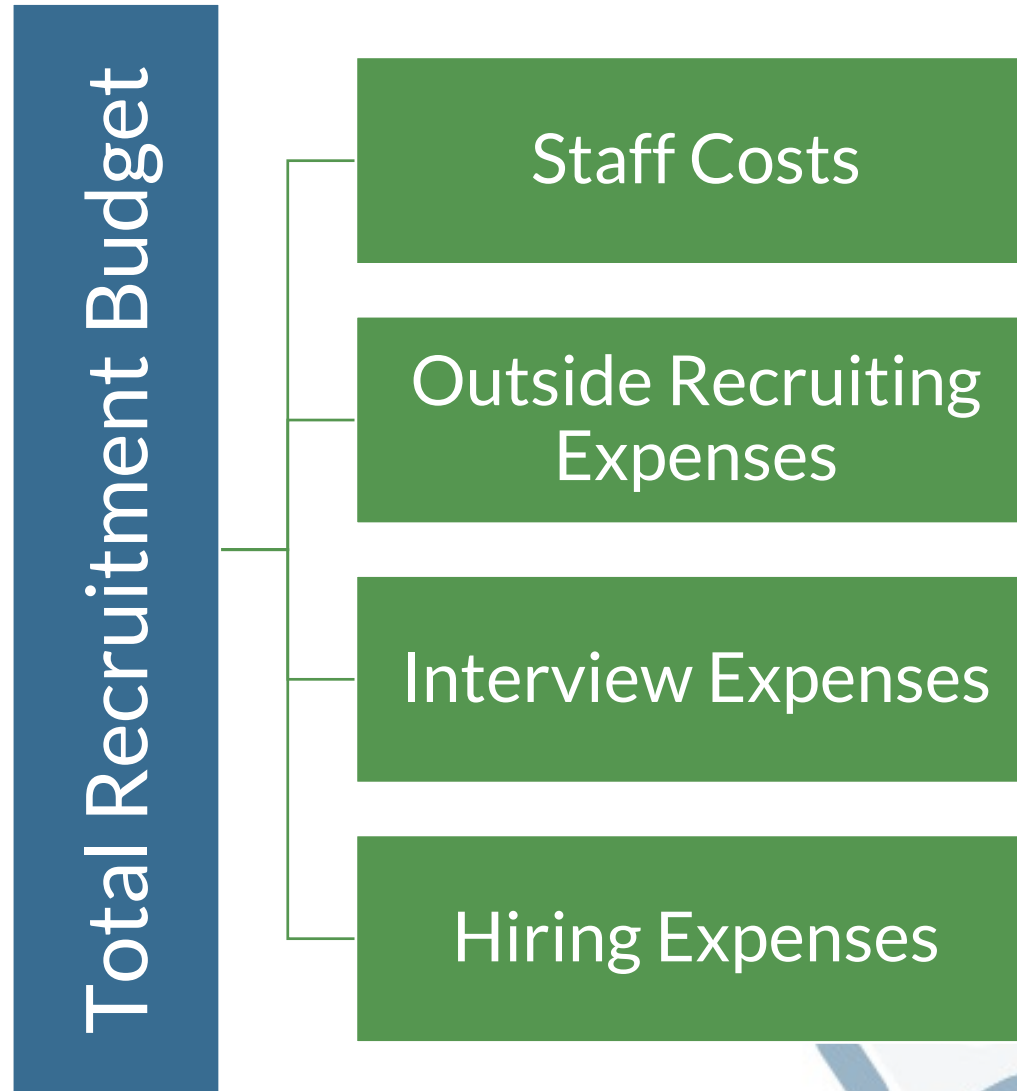# RECRUITMEQNT BUDGET
It's An Investment

Recruitment is an **INVESTMENT**, plan accordingly!

Plan for a realistic recruiting budget to ensure you have the resources required to mount a successful recruitment effort

Recruitment Budget (Table 14)

Table 14. Recruiting Budget Worksheet

Staff Costs (Planning, Recruiting, Onboarding)	
Business Office (Patient Accounts/Billing) Salary and Benefits per Hour	
CEO/Administrator Salary and Benefits per Hour	
Clinical C-Suite 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 Staff Costs	
Outside Recruiting Expenses	
Recruiting Service	
Advertising Costs – up to three national online or print services for three months including career boards managed by and for minority professionals (e.g., National Black Nurses Association, Out Professional Network)	
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 (include candidate and guest)	
Number of People Included in Interview Dinner per Interview	
Interview Dinner Cost Per Person per Interview (include tax and gratuity)	
Cost of Other Interview Items (e.g., gift baskets, babysitting service)	
Total Cost Per Interview	
Total Interview Expenses (Number of Interviews x Total Cost per Interview)	
Hiring Expenses	
Relocation Costs	
Signing Bonus	
Publicity Costs	
Other Costs (e.g., phone, lab coat, computer)	
Total Hiring Expenses	
Total Recruitment Budget	

Data to Identify Cost of Recruitment

Plan for a realistic recruiting budget to ensure you have the resources required to mount a successful recruitment effort
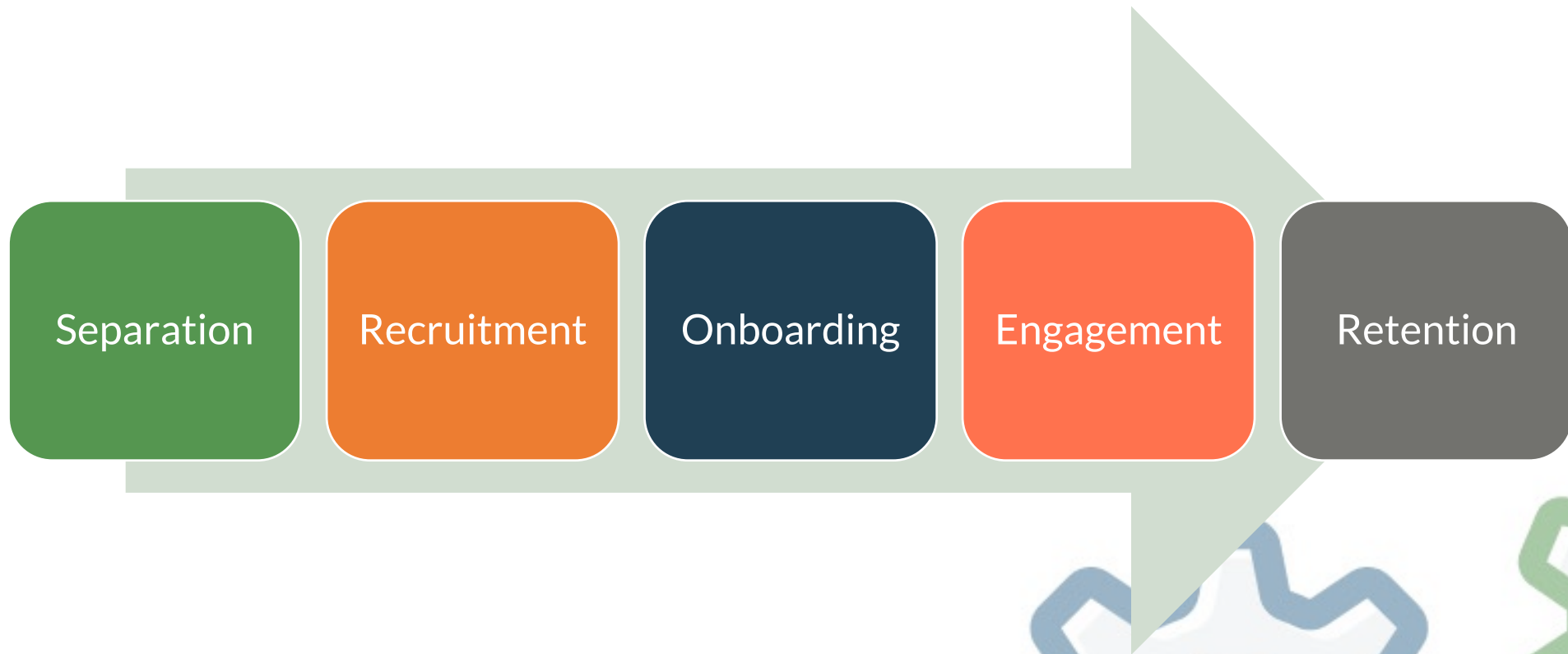
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COST OF **TURNOVER**

Turnover is **EXPENSIVE**, plan accordingly!

Calculate the cost of turnover at your health center

| Separation | Recruitment | Onboarding | Engagement | Retention |

RECRUITMENT FIRM
Is it Right for You?

- Get referrals and check references
- Contract with a professional recruiter
- Document/log rating information for future reflection and decisions
- Identify if value outweighs cost
- Request a discount for health center status

Please go to page 71 of the CWP Template

Table 13. Staff Recruitment Priorities

Position	FTE	Replacing	FTE	Is it a New Position?	Reason					Date	
					Current Vacancy	Planned Vacancy	Retirement	Growth	Other	Anticipated Need	Begin Recruitment Process

Please go to page 72 of the CWP Template

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Relocation Costs	
Signing Bonus	
Publicity Costs	
Other Costs (e.g., phone, lab coat, computer)	
Total Hiring Expenses	
Total Recruitment Budget	

SUCCESSION & WORKFORCE PLANNING

DEFINITION

Succession planning is the "future-focused practice of identifying the knowledge, skills, and abilities to perform certain functions and then developing a plan to prepare multiple individuals to potentially perform those functions" (Society for Human Resource Management [SHRM]).

KEY CONCEPTS

- Workforce Development

- Leadership Training

- Career Paths/Ladders/Lattices

- Employee Engagement & Retention

- Talent Recruitment

SUCCESSION PLANNING

Consider staff aspirations

Discuss plans with staff

Consider various reasons for retirement

SUCCESSION PLANNING
Things to Consider

- Regularly communicate with staff about plans

  - Life changes

  - Retirement

  - Schedule adjustments

- Be proactive

- Be comfortable with letting go

- Prepare staff

  - Leadership training

- Look internally

- Think broadly

- Use a diversity, equity, and inclusion (DEI) lens

ASSESS

- Identify business challenges in the next one to five years
- Identify critical positions that support business operations/continuity
- Identify competencies, skills, and institutional knowledge needed for success

EVALUATE

- Consider "high potential" employees
- Select skills and competencies individuals needed to succeed in their new role
- Categorize skills or competency gaps
- Predict likelihood of recruiting/retaining a qualified candidate pool

DEVELOPMENT

- Capture institutional and professional knowledge prior to employee departure (e.g., retirement, planned leave, unplanned departure)
- Develop targeted career development strategies

Source: University of Washington Succession Planning Toolkit

SUCCESSION PLANNING
Process

Identify Roles & Responsibilities → Identify Critical & Vulnerable Positions → Develop Eligibility Requirements → Identify Talent → Nominate Successors → Create an Action Plan → Evaluate Succession Plan
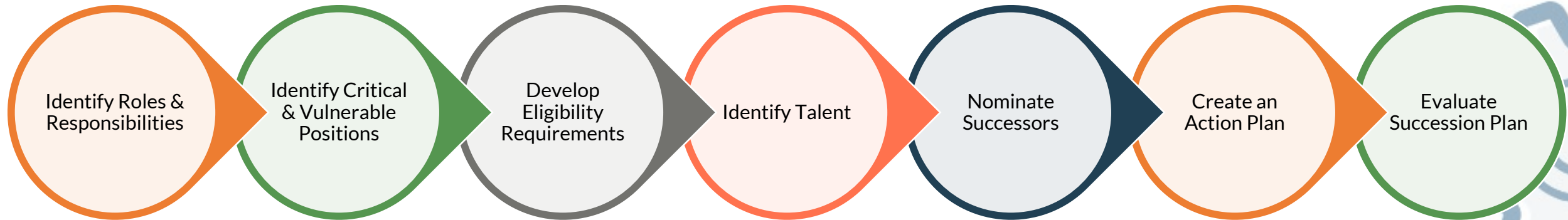
Source: NIH Succession Planning: A Step-by-Step Guide

SUCCESSION PLANNING

Table 8. Succession Planning (Retirement, Extended Leave, and FTE Changes)

Staff Member Name	Department	Role in HC	Staff Member Age Range			Over Age 50		All Ages	
			<50	50-65	>65	Discussed Retirement (Y/N)	Planned Retirement Age	Major Leave Plans	FTE Changes
	*document the department to help keep track of staffing needs, not just by position or role, but also by department					*if there is other pertinent information from the succession planning discussion with the employee add it to this column		*provide appropriate amount of detail to help with the success planning process	*provide appropriate amount of detail to help with the success planning process

UPSKILLING

CROSS-SKILLING

RESKILLING

SKILL-BUILDING STRATEGIES
Reskilling, Cross-Skilling, Upskilling

Reskilling
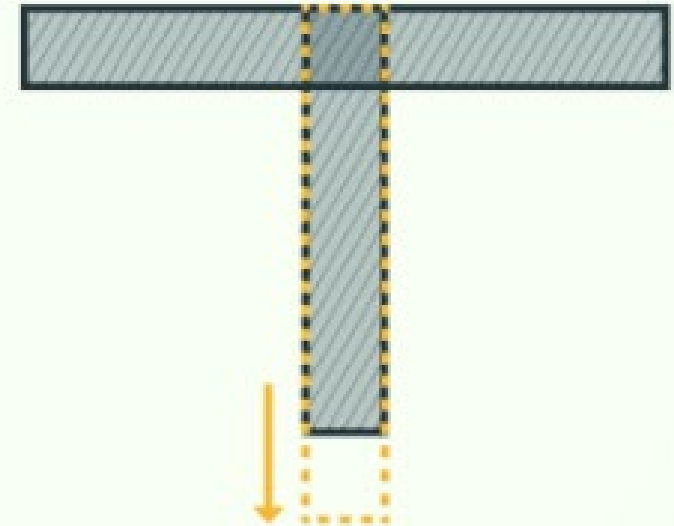
Cross-Skilling

Upskilling

Source: Gloat
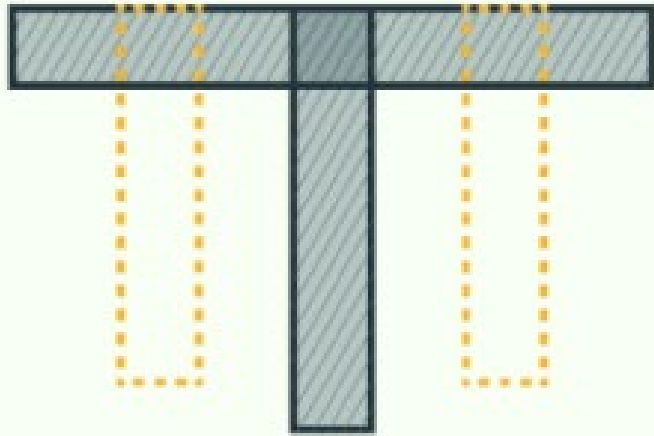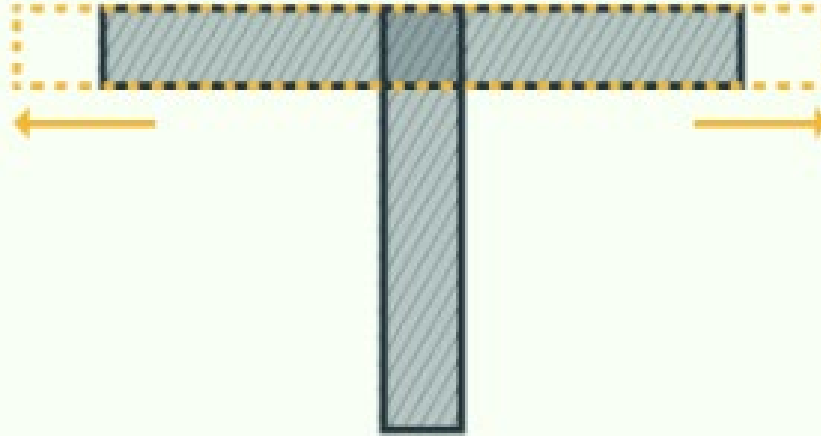
EXAMPLES OF TRAINING TOPICS

Vertical Career Pathways

Horizontal Career Pathways

Locating Appropriate Training

Formal Development Plan Evaluation

Time for a Break (15 mins)

JOB DESCRIPTIONS

JOB ANNOUNCEMENTS
Advertising Open Positions

- Write ads in ADVANCE!

  - Customize ads for each type of position AND media/outlet

  - Insert pertinent details when you have a vacancy

  - Save LOTS of time

- Write a COMPELLING ad!

  - Highlight your health center – what makes it unique?

  - Highlight your community – why would someone want to live there?

  - Include the benefits and positives about your health center – why is this a great place to work?

Practice Highlights:

Denver Health is an integrated, efficient, high-quality academic health care system that is considered a model for the nation. The Denver Health system includes the Rocky Mountain Regional Level I Trauma Center, a 525-bed acute care medical center, Denver's 911 emergency medical response system, 8 family health centers, 15 school-based health centers, the Rocky Mountain Poison and Drug Center, the Denver Public Health Department, an HMO, and The Denver Health Foundation.

As Colorado's primary safety net institution, Denver Health is a mission-driven organization that has provided more than $3.3 billion in care for the uninsured in the last ten years. Denver Health is a leader in performance and quality improvements and remains financially secure, in part, due to its nationally recognized implementation of lean principles in healthcare.

Denver Health is a major resource to the community, serving approximately 185,000 individuals and 67,000 children a year. Located just south of downtown Denver, Denver Health is just minutes away from many of the cultural and recreational activities Denver has to offer.

Denver Health values the unique ideas, talents, contributions reflective of the needs of our community. We are an institution committed to anti-racism in our workplace hiring practices and policies; diversity, equity, and inclusion constitute the fabric of our work culture. Diverse teams in an inclusive environment make better decisions, are more equipped to solve complex problems, adapt to change, produce better outcomes and are fundamental to our innovation. We actively foster a culture of inclusion in order to enhance the quality of care and safety for each patient at Denver Health.

We strive to attract, develop, and retain highly qualified, diverse individuals representative of our community, to draw on the wisdom of a workforce that reflects our community and better understands and meets the needs of those we serve.

Community Highlights:

Denver has all of the amenities of a major metropolitan area and is the gateway to the Rocky Mountains, with world class skiing a short drive away and abundant year round outdoor recreational activities.

JOB ANNOUNCEMENT TIPS

- Use positive language – not problem-focused language
- Answer the WHY? questions
- Explain your patient population
- Include your mission
- Avoid language that connotes a burnout environment
- Show that your health center values its workforce
- Include a salary range
- List your benefits
- Add a diversity, equity, and inclusion (DEI) statement
- Avoid gendered language
- Make it personal
- Employ a user-friendly application process

Develop an organizational DEI statement/commitment
- This is not an equal opportunity employer statement
- Add it to your job announcement and website

Highlight inclusive benefits
- Mentorship programs for BIPOC and other underrepresented staff
- Needs accommodations
- Inclusive leave policies

"

Central City Concern Equity Commitment
People of color and members of the LGBTQIA+ community experience homelessness at a far higher rate. This is unacceptable. CCC is committed to significantly reducing these disparities through improved culturally-responsive service delivery, broadened community partnership, advocating for systemic change, and advancing organizational equity.

"

Pull up a recent job posting from your organization and make edits with your team/tablemates.

INTERVIEWING

RECRUITMENT INTERVIEWS

Screening Process

Track your results

- Use the Excel doc, "Candidate Tracking Sheet" – a tool for tracking applicants through the recruitment process

Get in touch

- Once you receive the CV or résumé of a candidate you are interested in, contact them as soon as possible!
- Don't let the good ones get away

Prepare content ahead of time
- Overview of the health center
- Questions for the candidate
- Next steps

During the phone interview
- Describe the health center
- Outline the position
- Ask your predetermined set of questions
- Allow time for the candidate to ask questions
- LISTEN!

Finishing the interview
- What can the candidate expect next?
- Thank you!
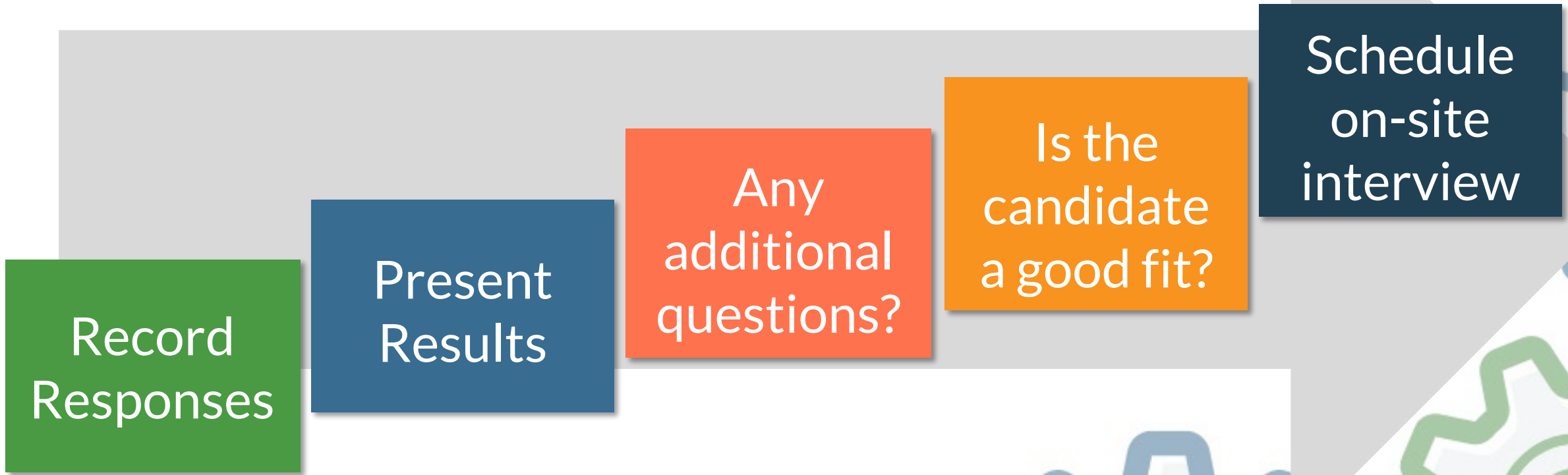
Record Responses

Present Results

Any additional questions?

Is the candidate a good fit?

Schedule on-site interview

RECRUITMENT INTERVIEWS
Be Intentional About JEDI

Review applications with diversity and inclusion in mind

Be aware of bias while reviewing applications

Identify a list of core questions to be asked of all candidates

Consider that cultural differences can affect first impressions of candidates

Establish a diverse hiring committee

Source: Duke University School of Medicine

JEDI QUESTIONS TO FOR AN INTERVIEW

- *Explain the population(s) your health center serves and how and why you value cultural humility and diversity; then ask:* What skills, identities, of backgrounds do you have that could help you serve these populations specifically?

- How has your background and experience prepared you to be effective in an environment that holds diversity, equity, and inclusion as core to our mission and values?

- Can you recall a time when a person's cultural background affected your approach to a work situation?

Source: Duke University School of Medicine

Plan ahead

- Logistics
- Visit
- Partner Itinerary
- Joint Itinerary

Utilize the Visit Details Worksheet, Table 18 of the CWP Template

Candidate Visit

Table 18. Visit Details Worksheet

Item	Details	Responsible/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 community			
Tour HC			
Meet with providers and provider team			
Meeting with CEO			
Review of contract/benefits/etc.			
Lunch/meeting with clinical c-suite			
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, partners/spouses, family			
Attend cultural events			

Considerations for our new virtual world

- If you're doing a virtual "onsite" interview, think of it in the same way you would an in-person one
  - Bring in different people,
  - Go on a virtual tour of your health center
  - Think about how to be welcoming to your candidate's family in a virtual setting
  - Get creative!

Please go to page 76 of the CWP Template

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1:15-3:30PM: Onboarding

    1:15-2:15PM: Onboarding for Success

    2:15-2:30PM: Break

    2:30-3:30: Onboarding Cont'd

3:30-4:00PM Wrap Up

ONBOARDING FOR SUCCESS

WHATS INVOLVED IN ONBOARDING?

Orientation | Expectations | Integration | Culture

The Goal
Is NOT Assimilation

It is crucial to understand your organizational culture, BUT finding the "right fit" is about inclusion, contribution, and positive evolution/change

Do employees feel like they can show up authentically?

Assimilation

To make the minoritized group resemble the majority group
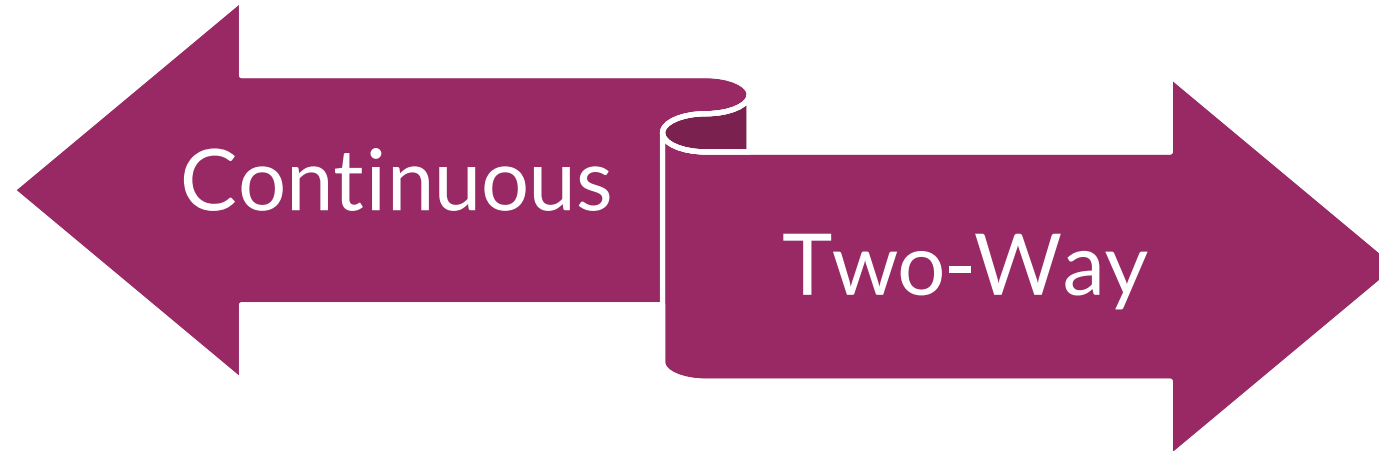
Integration

Blending of cultures

- Rigid expectations about how "professionalism" is defined

- Hiring for "Culture fit"

- "This is how we do things here/That's not how we do things here"

- Rewarding conformity

- Avoiding conflict

COMMUNICATION, COMMUNICATION, COMMUNICATION!

Continuous

Two-Way

Continuous, two-way communication may include:
- Listening sessions
- Stay interviews
- Formal or informal recognition

POSITIVE COMMUNICATION IS ESSENTIAL

Words and Actions Matter

- What you say and what you do matters

- How you say it and the actions you take matter

- Practice bi-directional communication
  - Create a dialogue
  - Don't be dismissive
  - Be open – listen, learn, adapt
- Take a strengths-based perspective

WHY ONBOARDING?

Integrates the new employee into the organization

Sets clear expectations

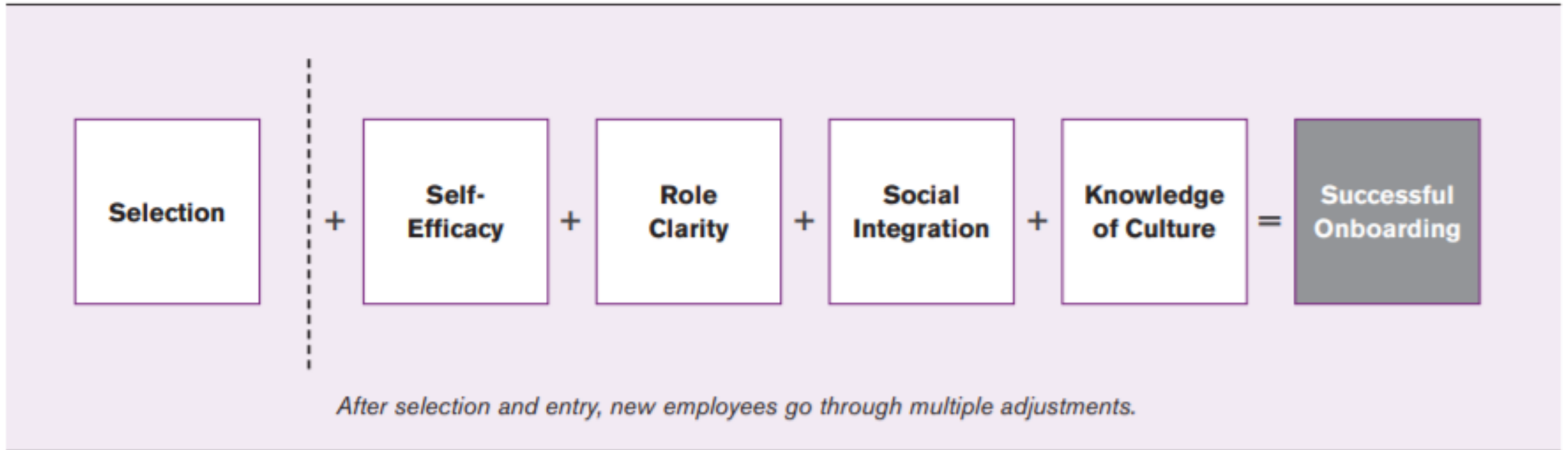Productivity occurs more quickly

Reduces turnover!

QUESTIONS TO ASK

- What impression do you want a new hire to walk away with after the first day?

- What do new employees need to know?

- How are you going to introduce your organization's culture and work environment to the new hire?

- What is everyone's role (HR, managers, co-workers)?

- What are the goals for your new hire?

- How long will onboarding last?

- How will you assess and measure the effectiveness of your onboarding program?

Source: SHRM New Employee Onboarding Guide

EXAMPLE ONBOARDING MODEL

Selection + Self-Efficacy + Role Clarity + Social Integration + Knowledge of Culture = Successful Onboarding

After selection and entry, new employees go through multiple adjustments.

Source: SHRM Onboarding New Employees: Maximizing Success

THE FOUR C'S OF ONBOARDING

Compliance
- Teaching basic legal and policy related rules and regulations

Clarification
- Understanding expectations, roles and responsibilities

Culture
- Vision, mission, values

Connection
- Interpersonal relationships, community connection

TIPS FOR SUCCESSFUL ONBOARDING

- Assign a mentor to orient the new staff member

- Assign a person and a realistic timeline for each onboarding activity

- Set expectations and goals for the new hire

- Arrange social interactions and allow for time to socialize with coworkers

- Conduct weekly check-in calls or meetings – taper off to bi-monthly and monthly over the first few months

- Provide opportunities for peer interaction outside the community

- Provide support resources

JEDI PRACTICES FOR ONBOARDING

- Discuss with new hires what JEDI means in your organization and how it is applied.

- Create a separate JEDI-specific onboarding session.

- Train hiring managers to lead in this space.

- Coach existing staff on embracing and supporting new hires.

- Inform new hires about internal/external employee resources or affinity groups available.

- Assign a work buddy.

MORE JEDI PRACTICES FOR ONBOARDING

- Make onboarding warm, welcoming, and empathetic to bridge cultural gaps.

- Provide new hires with a preview of the organization's culture and its adoption of JEDI principles.

- Ensure that there are 90-day check-ins during the onboarding process that address organizational culture.

- Set the tone that inclusivity is everyone's responsibility.

FEATURED RESOURCE:

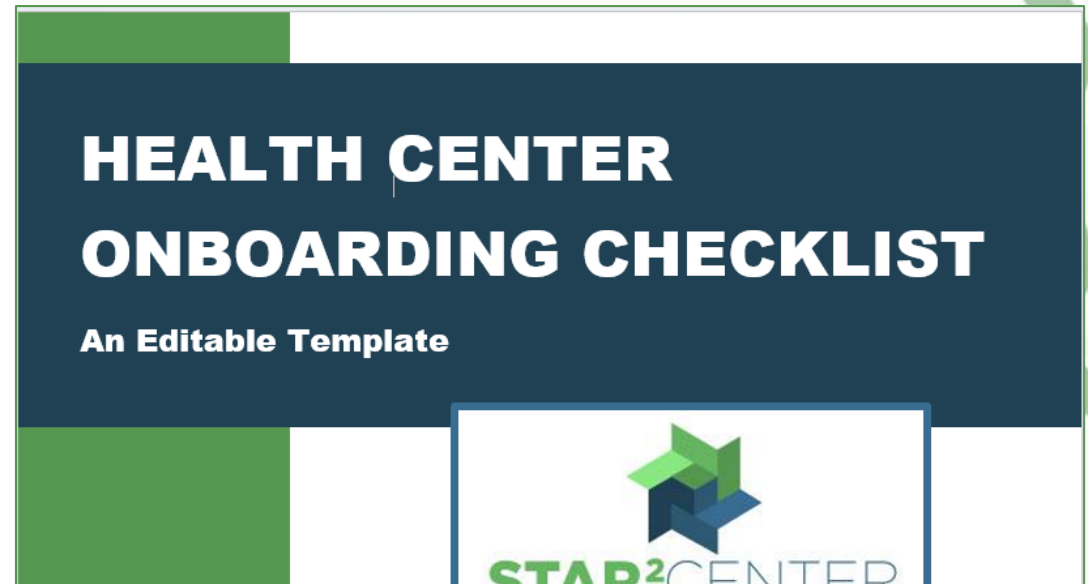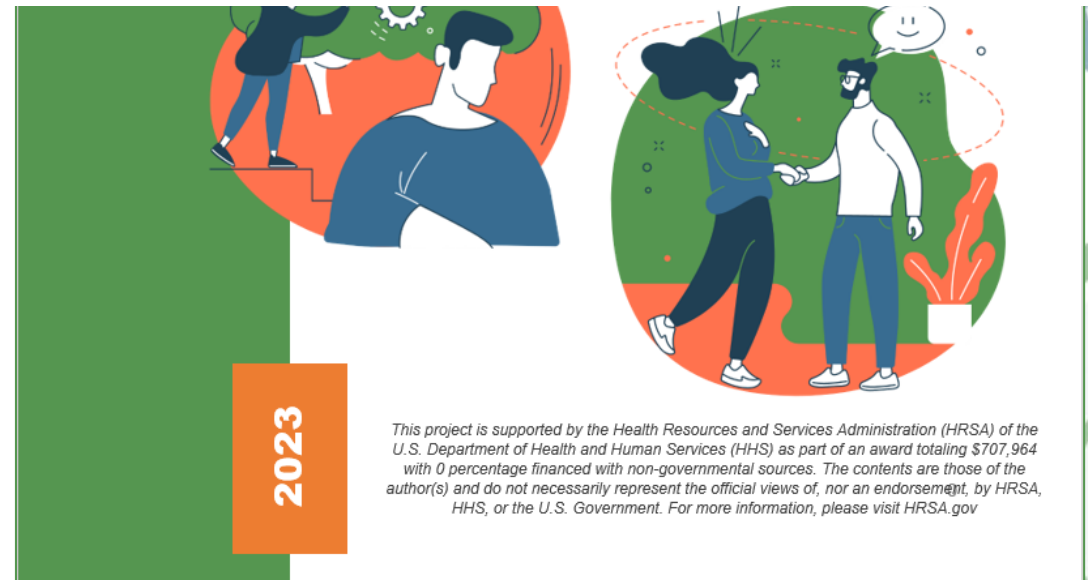## ONBOARDING CHECKLIST

A customizable Word document you can use to plan for and manage onboarding at your health center.

Access the resource here.

ONBOARDING CHECKLIST

HEALTH CENTER ONBOARDING CHECKLIST

An Editable Template

STAR²CENTER

https://chcworkforce.org/web_links/onboarding-checklist/

2023

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ONBOARDING WEBINAR

https://tinyurl.com/yy9v7nkc

WRAP UP

WHAT'S NEXT?
Building and Implementing your CWP

- Look for an email with resources!
  - CWP Template and Instructions
  - Financial Assessment Tool
- Get your team together
- Discuss processes with leadership
- Start building your CWP!
- Contact the STAR^2 Center team with questions

QUESTIONS