

# BUILDING A RECRUITMENT STRATEGY

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## ACU

ACU is a nonprofit, transdisciplinary organization of clinicians, advocates and health care organizations united in a common mission to improve the health of America's underserved populations and to enhance the development and support of the health care clinicians serving these populations.



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# STAR<sup>2</sup> CENTER

Solutions, Training, and Assistance  
for Recruitment and Retention

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# TODAY'S FOCUS

Building an effective  
recruitment plan



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## STAR<sup>2</sup> 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.

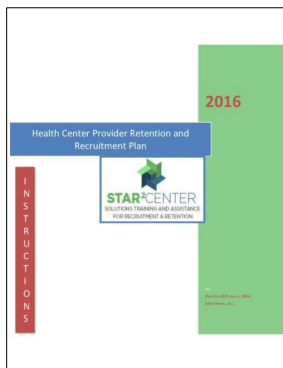
<http://www.chcworkforce.org/acu-health-center-provider-retention-and-recruitment-plan-template>



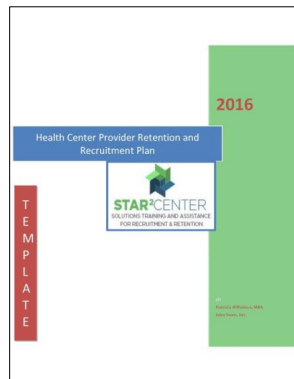
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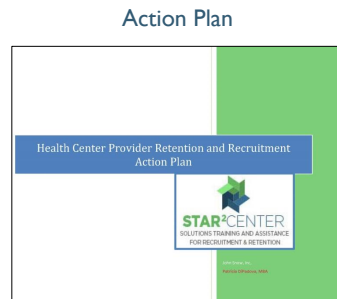
## Health Center Provider Retention & Recruitment Plan Tools



Instructions



Template



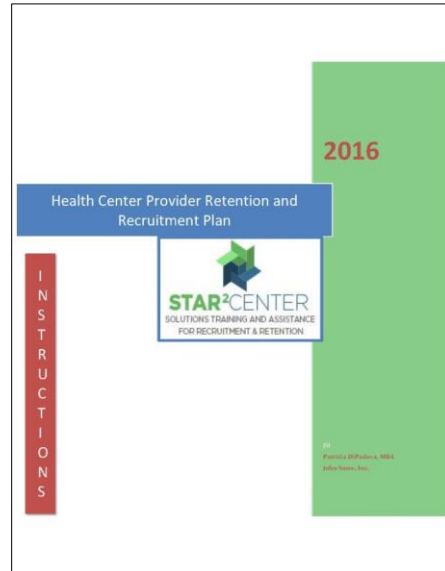
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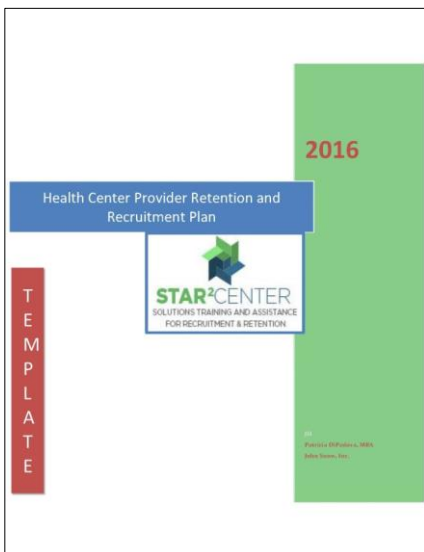
## INSTRUCTIONS

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



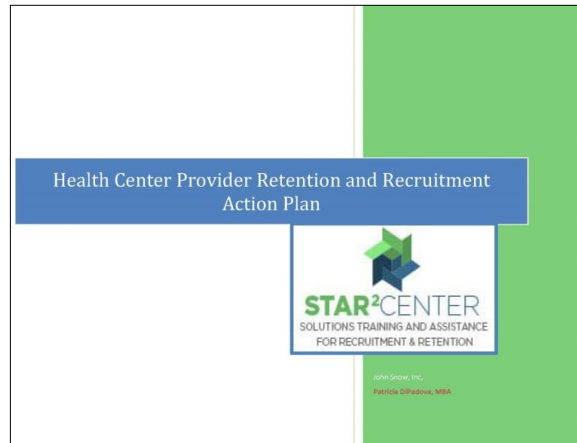
## TEMPLATE

- 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



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## BEFORE YOU RECRUIT

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



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# OPERATIONAL ASSESSMENT & STRATEGIC PLANNING



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## PROVIDER RETENTION

- Best strategy to minimize need to recruit
  - STAR<sup>2</sup> Financial Impact Tool
  - <http://www.chcworkforce.org/star%C2%B2-center-financial-assessment-tool>
- Identifying issues and making improvements in advance can improve recruiting process
- Understanding issues that can't be changed can help focus recruitment efforts

Tangible Costs	Cost
<b>A. Termination Costs</b>	
1. Human Resources and/ or Business Office Expense for terminating benefits, COBRA administration (if applicable), notifying health plans of provider change in status.	\$ -
2. Estimated cost of a Locum Tenens or other part time provider	\$ -
3. Malpractice tail coverage costs, if any	\$ -
<b>A. Total Termination Costs</b>	<b>\$ -</b>
<b>B. Replacement Costs</b>	
<b>4. Advertising Costs</b>	
5. Pre-Interview Staff Time - to arrange advertising; accept, sort and document applications (written and electronic); respond to telephone and written inquiries, arrange visits including logistics (hotel, travel, recruitment dinner), schedule telephone interviews and meetings with medical director, other staff involved in the decision process.	\$ -
6. Professional Recruiting Service Expenses	\$ -
7. Interview Staff Expenses	\$ -
8. Interview Direct Costs (on-site face-to-face interview visits)	\$ -
9. Post Interview Expenses - staff time for negotiation, other hiring expenses (bonus, relocation)	\$ -
<b>B. Total Replacement Costs</b>	<b>\$ -</b>
<b>C. Net Impact to Revenue</b>	
10. Revenue Loss from Leaving Provider	\$ -
11. Revenue Recovered from Locum Tenens	\$ -
<b>C. Total Net Impact to Revenue [Recovered - Loss]</b>	<b>\$ -</b>
<b>D. New Hire/Onboarding Costs</b>	
12. Payroll startup, Benefit Enrollment, establish passwords, email account	\$ -
13. Credentialing services cost (internal or Credentialing Verification Organization (CVO))	\$ -
14. Internal and external publicity announcements	\$ -
15. Equipment and Uniform expense	\$ -
16. Orientation Costs	\$ -
17. Cost of Productivity lost to startup	\$ -
<b>D. Total New Hire/Onboarding Costs</b>	<b>\$ -</b>
<b>Total Financial Impact</b>	<b>\$ -</b>



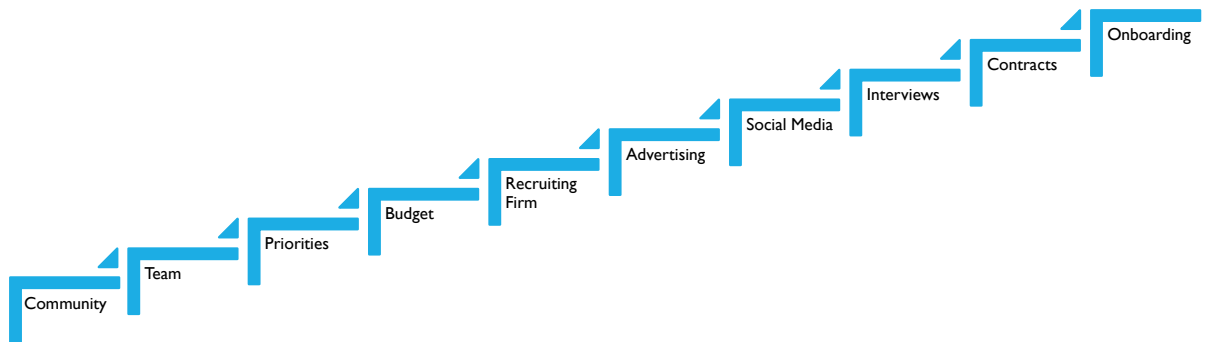
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# BUILDING A RETENTION PLAN



# DESIGNING A SUCCESSFUL RECRUITMENT PROCESS THROUGH PLANNING

# RECRUITMENT PLANNING PROCESS



# IDENTIFY COMMUNITY 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

*Teamwork makes*  
**THE DREAM WORK.**

- Create the team in advance
- Have decision makers at the table
- Establish clear roles and responsibilities

Position	Responsibilities
<b>Chief Medical Officer</b>	With CEO define position, Contribute to draft ad, Assist with screening calls, Final interviews, Visit dinner event
<b>Administrator/CEO</b>	With CMO define position, Contribute to draft ad, Assist with screening calls, Final interviews, Visit dinner event
<b>Recruitment Staff (may not have this title, but need to appoint someone in this role)</b>	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)
<b>Provider Team Members</b>	Input defining position, Contribute to draft ad, Final interviews and visit events as necessary
<b>Clinical Support Staff</b>	Part of site tour and informal interviews during visit
<b>Administrative Staff</b>	Support Recruitment Staff, Potentially part of site tour and informal interviews during visit
<b>Community Member</b>	Potentially part of final interviews, Visit dinner event
<b>Provider Team Spouse</b>	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 your larger Strategic Workforce Plan to identify:
  - Positions to be filled
  - Realistic timelines for completing the recruitment process
- Update as new information becomes available



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 A RECRUITMENT BUDGET

- Review with all members of the team their experiences with past expenses, limitations, etc.
- Get approval and leadership support for a realistic recruitment budget
- STAR<sup>2</sup> Center Financial Impact Tool to analyze ROI!

<b>Staff Costs (Planning, Recruiting, Onboarding)</b>
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
<b>Total Salaries/Benefits</b>
<b>Outside Recruiting Expenses</b>
Recruiting Service
Advertising Costs (2 national journal print ads, 1 national online service x 3 months)
<b>Total Outside Recruiting Expenses</b>
<b>Interview Expenses</b>
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)
<b>Total Cost Per Interview</b>
<b>Total Interview Expenses (# of Interviews X Total Cost per Interview)</b>
<b>Hiring Expenses</b>
Relocation Costs
Signing Bonus
Publicity Costs
Other Costs, i.e. cell phone, lab coat
<b>Total Hiring Expenses</b>
<b>Total Recruitment Budget</b>



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## DECIDE ON RECRUITING FIRM (IF ANY)

- Buy or Build decision
- 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



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## DEVELOP AN ADVERTISING STRATEGY



- Plan and track all advertising
- Develop a broad advertising strategy focused on local, state, and national sources
- Leverage partnerships

## 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	
<b>Body</b> <ul style="list-style-type: none"> <li>○ Type of organization recruiting</li> <li>○ Location</li> <li>○ Statement of position type, FT or PT</li> <li>○ Promote mission driven health center environment</li> <li>○ Brief description of the positive aspects of the region                             <ul style="list-style-type: none"> <li>▪ i.e. If urban, cultural opportunities; if rural, outdoor/nature experiences</li> </ul> </li> <li>○ Promote any positives, such as flexible schedules, teaching opportunities</li> <li>○ Include any recognition, such as PCMH</li> <li>○ Include possible incentives, such as professional development benefits, bonuses, relocation expenses</li> </ul>	<ul style="list-style-type: none"> <li>■ Draft a generic ad in advance</li> <li>■ Include template in the plan</li> <li>■ Review ad each time it is used to make sure it is updated and meets the health center's needs</li> </ul>
Contact Person and Information	

## DEVELOP STRATEGIES FOR USE OF SOCIAL MEDIA

- Start with your website and then go forth!
- Social media presences should already be part of your health center's branding strategy
- Start small
- Leverage current staff



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 & INTERVIEW PROCESS



- Track screening and interviewing activities
- Rely on team and previously determined roles and responsibilities
- Screen CVs or applications received online
- Telephone interviews & visits

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



# 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



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# THE VISIT

- Don't delay!
- Engage the community
- Engage the whole family
- Engage the whole team

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			



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## CANDIDATE FOLLOW UP

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

## 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

- Onboarding vs. Orientation
- Consider as part of your Retention Strategy
- Formal roles for health center team



# IDEAS 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

## 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 STAR<sup>2</sup> Center

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

## QUESTIONS?



STAY IN TOUCH!

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info@chcworkforce.org

844-ACU-HIRE



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