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# Agency Self-Assessment

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How are we doing today?



# Self-Assessment: Staff Retention across the Employee Lifecycle

Lifecycle Stage	Rating	Examples of Enablers (+) and Barriers (-)																														
<b>Getting Hired</b> <ul style="list-style-type: none"> <li>Accurate Job Description written as an invitation to join a valuable mission</li> <li>Communication response rate that signals we're excited about finding someone and value the applicant's time</li> <li>Communication tone that is respectful</li> <li>Well-organized interview process and tone that signals respect for candidate</li> </ul>	<table border="0"> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5							
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<b>Onboarding</b> <ul style="list-style-type: none"> <li>Organizational Readiness for the New Hire</li> <li>Clear Process – for Day 1; for 30-60-90 days</li> <li>Appropriate Resource access</li> <li>Roles &amp; Responsibilities - clarified</li> <li>Support - available for encouragement and questions</li> </ul>	<table border="0"> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	
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<b>Working Here</b> <ul style="list-style-type: none"> <li>Mission – is clear and guides daily decisions</li> <li>Leadership – role-model positive behaviors and create a respectful work environment</li> <li>Coworker interactions – civil, respectful, inclusive</li> <li>Workload – reasonable within available time and with available resources</li> <li>Process efficiency – processes are designed to streamline work and minimize administrative load</li> </ul>	<table border="0"> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>0</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> </table>	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	
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# Self-Assessment: Staff Retention across the Employee Lifecycle

Lifecycle Stage	Rating	Examples of Enablers (+) and Barriers (-)																								
<b>Growing Here</b> <ul style="list-style-type: none"> <li>• Intellectual stimulation</li> <li>• Opportunity for increased responsibility</li> <li>• Support for Professional Association participation</li> <li>• Career pathways</li> </ul>	<table border="0"> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> </table>	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5	
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<b>Enrolling Others</b> <ul style="list-style-type: none"> <li>• Opportunity to develop others</li> <li>• Representing the Agency at external recruiting events</li> <li>• Leading new hire orientation and onboarding</li> </ul>	<table border="0"> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> </table>	0	1	2	3	4	5	0	1	2	3	4	5	0	1	2	3	4	5							
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# INSTRUCTIONS FOR SHARING & DISCUSSING YOUR RATINGS

Each person in an organization experiences the organization differently and has access to slightly different information. This is an opportunity to share your observations and perceptions to develop a more complete picture of your agency's current state.

1. Choose a recorder.
2. Start with **Getting Hired** – Take turns sharing your ratings and comments.
3. Record common perceptions AND significant differences.
4. Differences – ask for and share examples to illustrate. Don't push for agreement (yet).
5. Repeat Steps 2-4 for stage of the employee journey:
  - a. Onboarding
  - b. Working Here
  - c. Growing Here
6. Discuss and answer the following:
  - a. What are our agency's *key strengths* in terms of attracting and retaining staff?
  - b. On what area(s) should we focus first?



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# How might we...?

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Designing for Retention



# GETTING INTO A DESIGN MINDSET

CURRENT LIMITING MINDSET	COUNTER FACTS	ALTERNATIVE EXPANSIVE MINDSET
“It’s really hard to find people. No one wants to work in reproductive health.”	Hospitals are laying off nurses. Nurses are leaving hospital work looking for opportunities for more meaningful work and more regular schedules.	“Our mission and more normal work schedules make us an attractive option for nurses seeking something new.”
“Our turnover rate is horrible. We just can’t keep people.”	Even though our turnover rate is high, we also have a high percentage of people who have stayed for more than 5 years.	“We are the <i>right</i> workplace for people aligned with our mission and values.”
“Reproductive healthcare work is really hard. People burn out fast.”	Even if our burnout rate is 40%, that means 60% of our staff are not burned out.	“Something is obviously working for the 60%. Let’s figure out what that is.”
“We don’t pay enough to attract the best talent.”	Job seeker surveys across industries show a large rise in people willing to work for lower wages to achieve better quality of life.	“Let’s focus on what we can offer in terms of a positive work environment and reasonable work-life balance.”



# COLLABORATIVE DESIGN SESSION

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## STEP 1 – REGROUP

1. Each table should have a marker indicating the table topic:
  - Getting Hired
  - Onboarding
  - Working Here
  - Growing Here
2. If your Agency has multiple representatives - Distribute yourselves among as many areas as possible.
3. If you are the only representative - Go to a table focused on the area where you think your Agency should be focusing

## STEP 2 – CHOOSE A RECORDER

## STEP 3 – SELECT A ROLE TO FOCUS ON (e.g., Provider, Nurse, Admin, etc.)

## STEP 4 – SELECT A PROMPT FROM THE WORKSHEET (next page)

## STEP 5 – BRAINSTORM AND SHARE IDEAS IN RESPONSE TO THE PROMPT



# DESIGN BRAINSTORMING PROMPTS

## ***Attracting/Hiring***

- How might we write job descriptions that accurately represent the work to be done *and* that appeal to people most likely to stay for at least two years?
- How might we ensure that every applicant receives automated notification within 24 hours and contact from a real human within 3 business days of submitting an application?

## ***Onboarding***

- How might we design our onboarding process to ensure new hires feel welcome, supported, and set up for success?
- How might we design our onboarding process to help new hires develop a vision of themselves as long-term team members?
- How might we ensure new hires feel supported without overburdening existing team members?

## ***Working at the Agency***

- How might we ensure all employees feel connected to and supported by their teams?
- How might we create a culture of civility and respect within and across teams in our Agency?
- How might we ensure reasonable workloads for all team members?
- How might we create an “early warning system” to intervene when someone is struggling before they burn out and/or disengage?

## ***Growing at the Agency***

- How might we ensure that all team members - from front desk to top leadership - experience opportunities for growth?
- How might we create clearer career pathways and make sure all employees are aware of them?
- How might we give our seasoned team members opportunities to contribute by enrolling (recruiting) & supporting others?





# WORKING LUNCH:

## Designing Retention into *your* Agency DNA

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### **BUILD ON WHAT'S WORKING**

1. What is currently working (or works sometimes) that we would like to do more consistently?
2. What needs to change to enable this to happen more consistently?

### **TRY SOMETHING NEW**

3. What one or two new ideas did you get from your colleagues that you would like to try?
4. What resources or changes would be needed to implement this idea?

### **REMOVE BARRIERS**

5. What are the impediment to your being able to implement these ideas? (Mindset?)
6. How could you remove or reduce that barrier?

### **NEXT STEPS**

7. What 3 actions do we need to take within the next 30 days to begin making change?
8. Decide who will do what by when and write those actions on your calendar – NOW.



# STAFF RETENTION ACTION PLAN

ACTION	WHO WILL DO	BY WHEN	WHO/HOW TO NOTIFY WHEN COMPLETE?

