Building Onboarding Programs and Retention Strategies That Stick

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JSI

New York State Family Planning Training Center
nysfptraining.org

Learning Objectives

By the end of today's session, you will be able to:

- Describe the three phases of a robust onboarding program and identify the key activities and goals of each phase.
- Describe how to identify gaps in their organization's onboarding program across all three phases.
- Examine proven retention strategies that can meaningfully reduce turnover and sustain long-term employee engagement.

BPHC National Workforce Well-being Survey

Key Findings

Survey Results

The survey was administered to health centers from November 2022 – January 2023.

Response Rate

- 47% health center participation rate (694 participating health centers out a total of 1,481 HRSA supported health centers)
- 37% staff response rate (N=52,568)

Key Findings

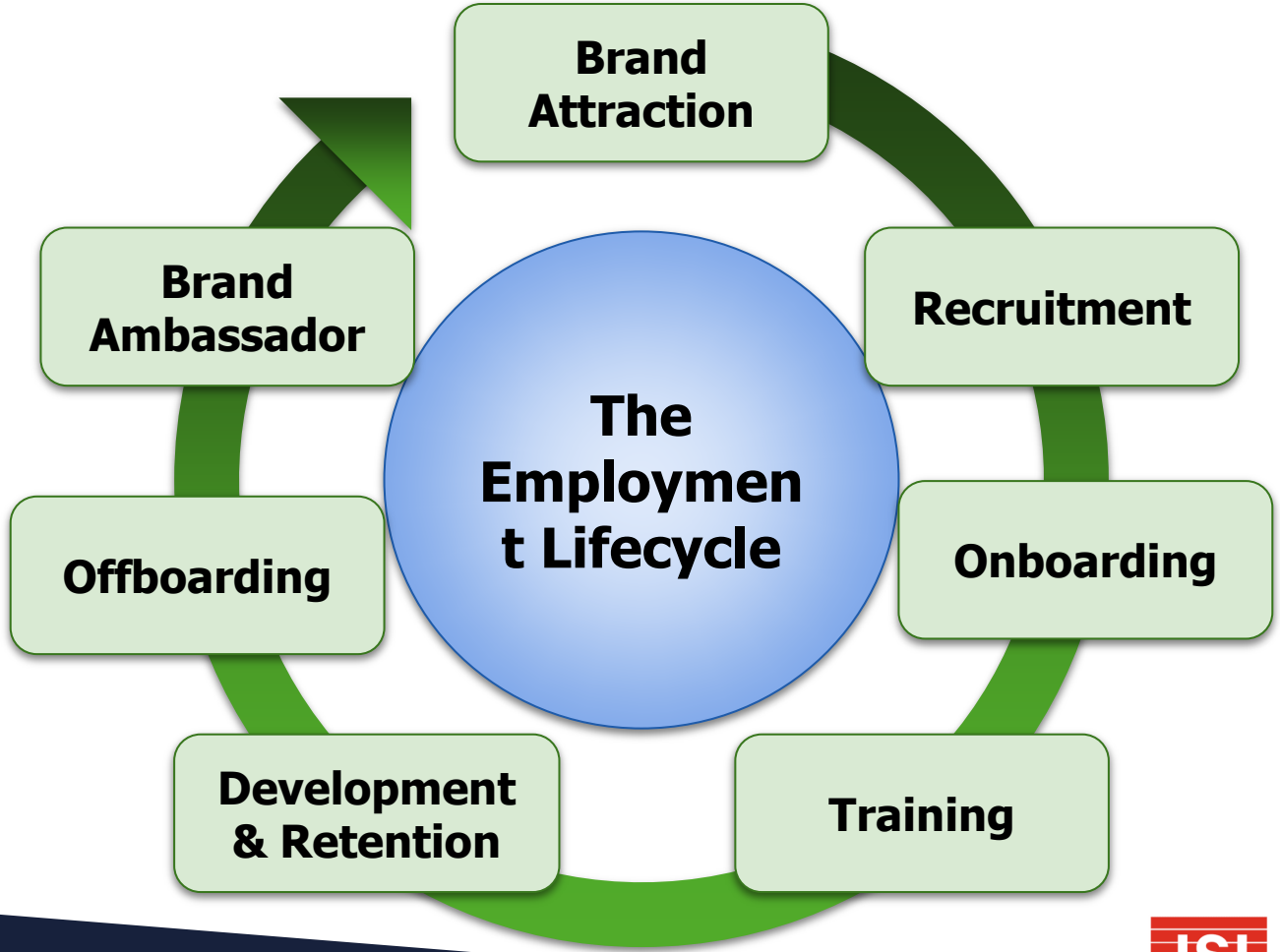
- Staff providing Direct Clinical Services are more likely to be burned out, less satisfied with their jobs, less engaged in their work, and less likely to stay at their current job.
- Staff in Management and Administration had lowest burnout scores and were most engaged with their work.
- Ancillary Clinical Staff were most satisfied with their job and most likely to stay at the health center.
- A higher mission orientation score was correlated with a higher burnout score.

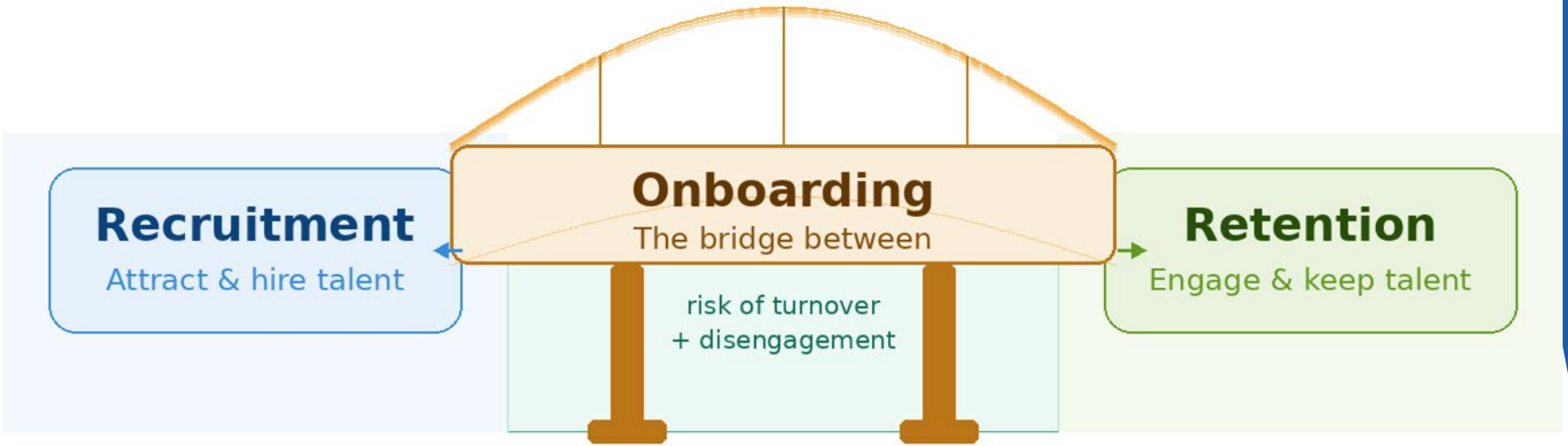
Top Ten Predictors for Well-being Outcomes in Descending Order

High Burnout:	High Engagement:	Strong Intention to Stay:	High Job Satisfaction:
↑**Work Load** ↓Work Life Balance ↓Professional Growth ↓Age ↑Moral Distress ↓Meaningfulness ↓Recognition Race Ethnicity[1] ↓Organizational Tenure ↑Mission Orientation	↓**Moral Distress** ↑Meaningfulness ↑Team ↑Supportive HC Processes Race Ethnicity[1] ↑Age ↑Work Life Balance ↓Compensation & Benefits ↑Organizational Tenure ↑Recognition	↑**Professional Growth** ↑Culture ↑Age ↑Work Life Balance ↑Meaningfulness ↑Supervision ↑Compensation & Benefits ↓Moral Distress ↓Education ↑Organizational Tenure	↑**Culture** ↑Professional Growth ↓Work Load ↑Meaningfulness ↑Compensation and Benefits ↑Work Life Balance ↑Leadership ↑Age ↑Supervision ↑Organizational Tenure

1. Race/ethnicity is a strong predictor of high burnout and high engagement.
   a. High Burnout: White Non-Hispanic respondents are more likely to be burned out compared to all other race/ethnicity identities.
   b. High Engagement: American Indian/ Alaska Native Non-Hispanic, Asian Non-Hispanic, Native Hawaiian and Other Pacific Islander Non-Hispanic, Multicultural Non-Hispanic, and Other Non-Hispanic respondents are less likely to be engaged compared to Hispanic, Black Non-Hispanic, and White Non-Hispanic respondents.

Onboarding


Brand Attraction
Recruitment
Onboarding
Training
Development & Retention
Offboarding
Brand Ambassador
The Employment Lifecycle


Recruitment
Attract & hire talent
Onboarding
The bridge between
risk of turnover
+ disengagement
Retention
Engage & keep talent

Why Onboarding?

Approximately 30% of new hires quit their job within the first 90 days of employment.

Why Onboarding?

Turnover is expensive!

The cost of replacing an employee ranges from 50% to 200% of an employee's annual salary, depending on their role.

Why Onboarding?

Increases Employee Engagement

Sets clear expectations

Productivity occurs more quickly

Increases Retention

ORIENTATION ONBOARDING

The Four C's of Onboarding

Compliance

- Teaching basic legal and policy related rules and regulations

Clarification

- Understanding expectations, roles and responsibilities

Culture (Organizational Work Environment)

- Vision, mission statement

Connection

- Interpersonal relationships, community connection

Source: SHRM Onboarding New Employees: Maximizing Success

Challenges of The Four C's

Compliance	Tracking compliance can be a challenge when the organization is large and across many different locations.
Clarification	Challenges may arise when roles are evolving, requiring ongoing clarification between individual roles and goals.
Culture	Culture is caught, not just taught. Create genuine opportunities for new employees to experience your values in action, rather than simply presenting them on a slide.
Connection	Connecting staff across locations or those in virtual setting can be challenging. Facilitating meaningful relationships should ensure that there are opportunities for social interaction.

Onboarding Activities

May Involve:

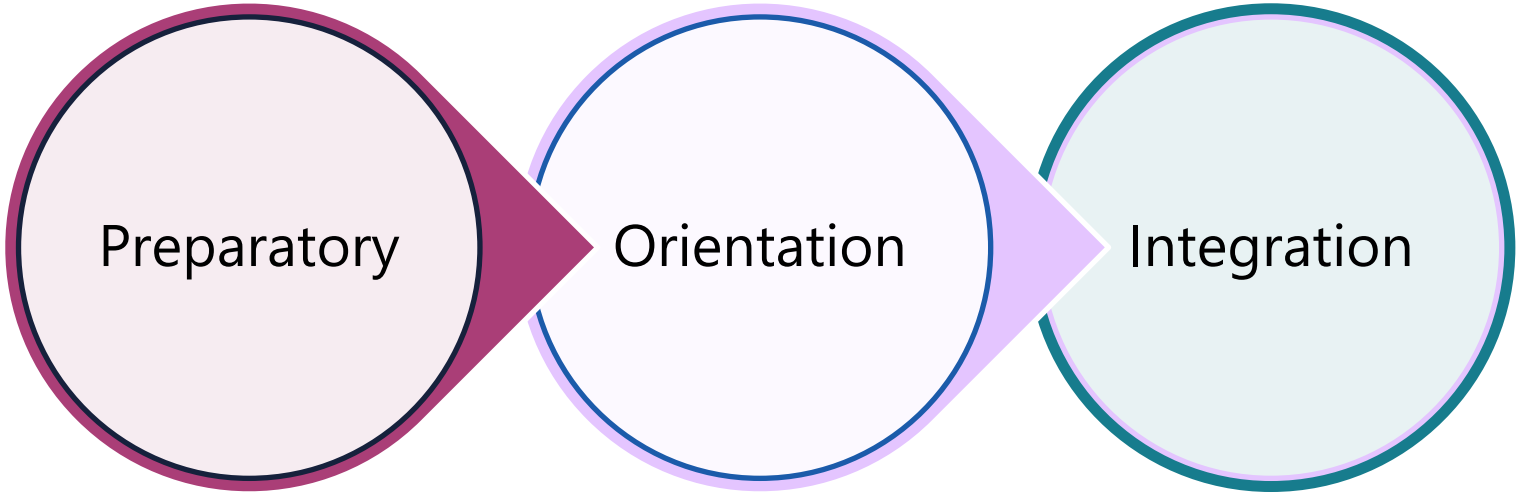
- **Building relationships** with administration, leadership, direct reports, and other staff
- Understanding **organizational environment/structure**
- **Orienting** to facilities, computer system, EMR, policies and procedures, etc.
- **Introducing** new hire to the community
- **Credentialing, licensing, etc.** (for providers)

Onboarding: Ask Yourself

- 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 new hire to the organization's work environment?
- 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

Creating an Onboarding Plan



Upon Hiring Decision
Prior to Start Date

First Days
First Weeks

First Three Months
First Six Months
First Year

Creating an Onboarding Plan

- Provide a **structure** and a **process** for welcoming new hires to your organization
- Create a **checklist for all staff**, as well as sections for additional **considerations for specific clinical staff**
- When crafting your plan, **consider the following questions** for each onboarding activity:
  - **Who** will be responsible for ensuring this component of your new hire's onboarding is completed?
  - **When** should the planning for this onboarding activity take place? Before the new employee's start date? Within their first two weeks?
  - **When** should the new hire or responsible staff person aim to complete this activity?

Be thorough – *more detail is better than less!*

Be clear about expectations – *what constitutes success?*

Preparatory

Process Monitor/Mentor/ Responsible Staff	Upon Hire Decision	Completed (date and by whom)	Prior to Start Date	Completed (date and by whom)
Manager	Create new hire schedule		Add/invite to existing meetings	
	Designate coworker resource		Call to confirm start date and time, include first day expectations	
	Discuss relocation, if applicable		Create welcome packet	
	Identify HR point of contact		Inform department, HR, and IT	
			Schedule pertinent training	
			Email existing staff to introduce new hire, include professional background, hobbies, and interests if the new employee agrees	
Office Administrator	Submit technology requests		Secure work area/station	
	Order passkeys, IDs, etc.		Designate space	
			Furniture, supplies, etc.	
			Phone setup	
			Obtain nameplate, business cards, etc.	
Human Resources	Create personnel file		Confirm receipt of all recruitment docs	
			Confirm offer letter reception/acceptance	
			Confirm background check completion	
			Communicate organizational practices	
			Communicate organizational policies	
			Enroll in new hire briefing, webinar, etc. if applicable. Otherwise, schedule new hire briefing	
Technology			Passkey order form	
			Temporary access for new hire	
			Software acquisition	
			Mobile device(s), if applicable	
			Hardware setup	
			Network setup	

Orientation

Process Monitor/Mentor/ Responsible Staff	First Day(s)	Completed (date and by whom)	First Week(s)	Completed (date and by whom)
Manager	Welcome upon arrival		Ask how first weeks went	
	Guide to work station/office		Provide support to guide the new employee through questions and challenges	
	Deliver prepared welcome packet		Review training schedule	
	Discuss break/meal policies		Review all technology functionality	
	Discuss trial period, if applicable		Touch base with coworker/colleague resource	
	Introduce to designated coworker/colleague resource		Discuss current projects	
	Explain role/position in team-based care model		Go over HC Standard Operating Procedures (SOP)	
	Explain roles/positions of others on the care team and how to coordinate across the care team			
	Introduce Health Center Program & history			
	Discuss the health center's mission statement and patient population			
	Set up regular check-in meetings			
Office Administrator	Provide company structure sheet			
	Provide company contact list access			
	Provide any maps, parking passes, etc.			
Human Resources	Connect to complete any paperwork		Review company policies	
	Review portal		Ask employee how first weeks went	
	Sign offer letter, if necessary		Ask manager how first weeks went	
	Enroll in any benefits/services			
	Discuss organizational environment and work style			
	Discuss organizational expectations			
Technology	Review software, hardware, printers, etc.			
	Confirm email setup			
	Confirm phone setup			
	Review tech acceptable use policies			
	Assist with online directory setup			
	Provide access to company software programs			
Designated Coworker/Peer Resource	Conduct tours		Periodic check-ins	
	Answer any questions			
	Offer to take to lunch			
	Make peer introductions			

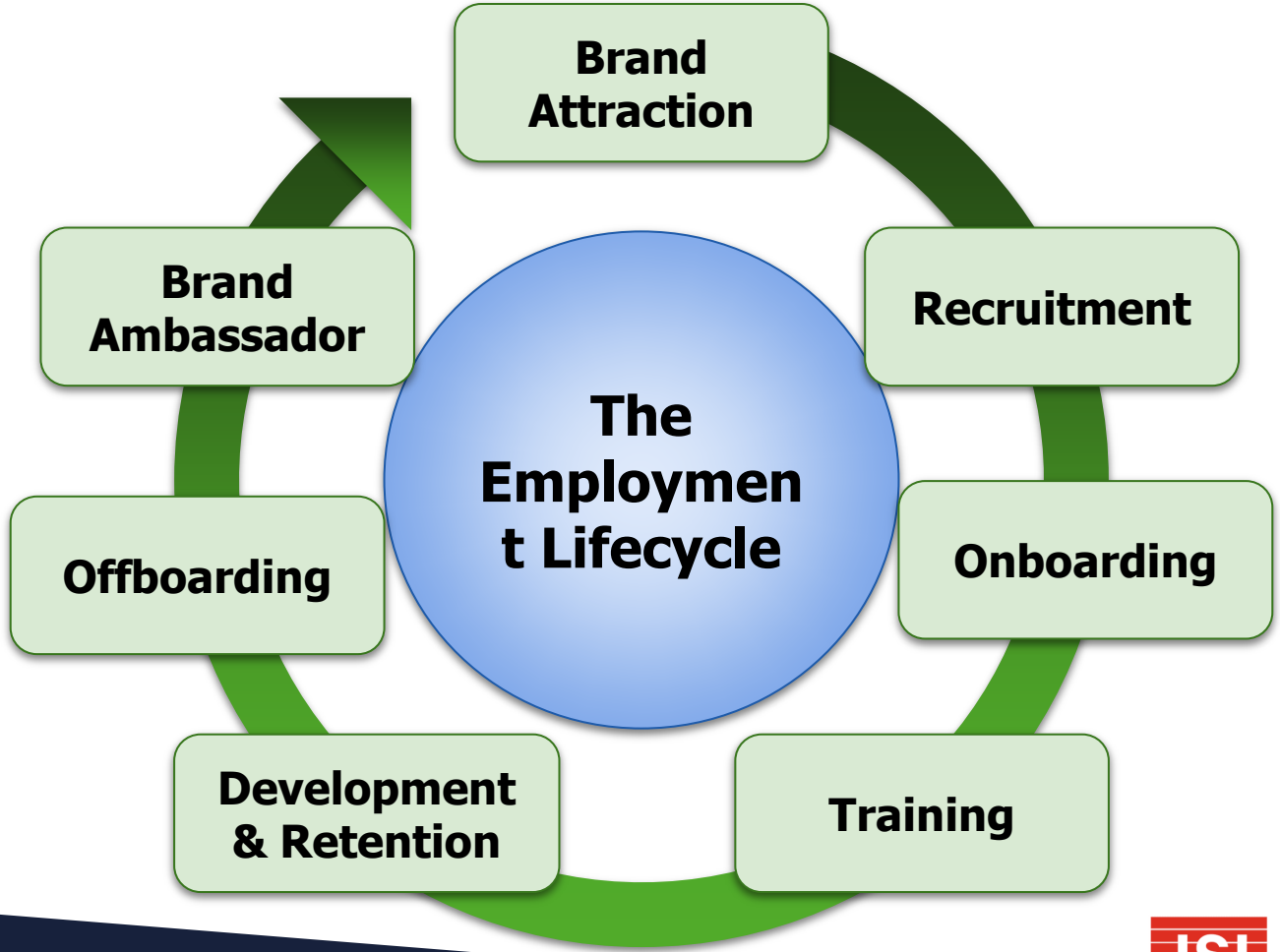
Integration

Process Monitor/Mentor/ Responsible Staff	End of First Three Months	Completed (date and by whom)	End of First Six Months	Completed (date and by whom)
Manager	Assess progress		Performance review	
	Make any further introductions		Review short and long-term goals	
	Identify and address learning needs		Answer any questions	
	Make any responsibility adjustments		Schedule ongoing professional development	
	Performance check-in		Celebrate end of trial period status if applicable	
	Review short and long-term goals		Schedule annual performance review	
	Answer any questions		Answer any questions	
	Continue regular check-ins based on employee need		Reassess goals	
			Stay Interview (if not conducted by HR)	
Human Resources	Performance check-in		Stay Interview (if not conducted by supervisor)	

Poll: Does your family planning program have a tailored onboarding experience or do staff receive the same onboarding experience as the rest of the employees at the organization?

- Same
- Customized
- I'm not sure

Retention Strategies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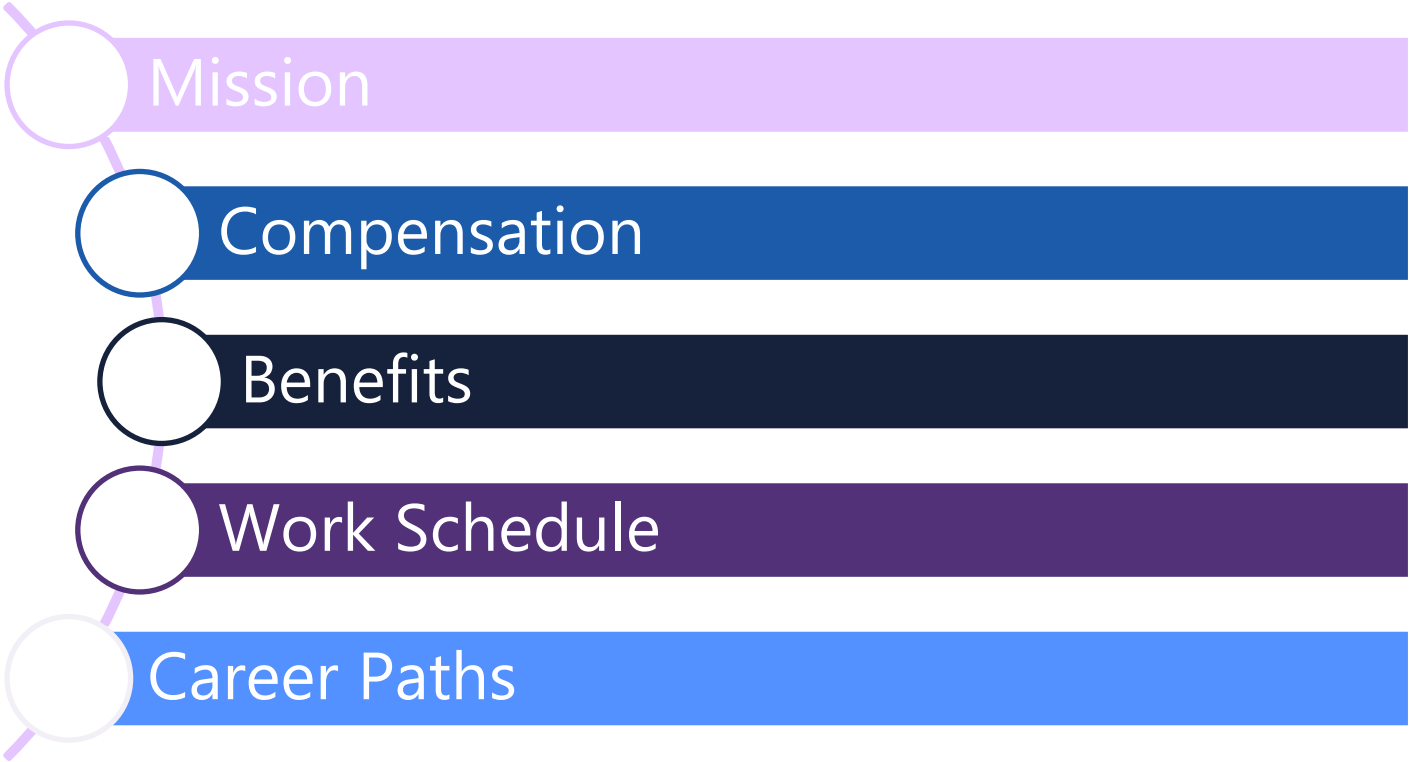
Retention Strategies



Work Schedules

According to a study by SHRM:

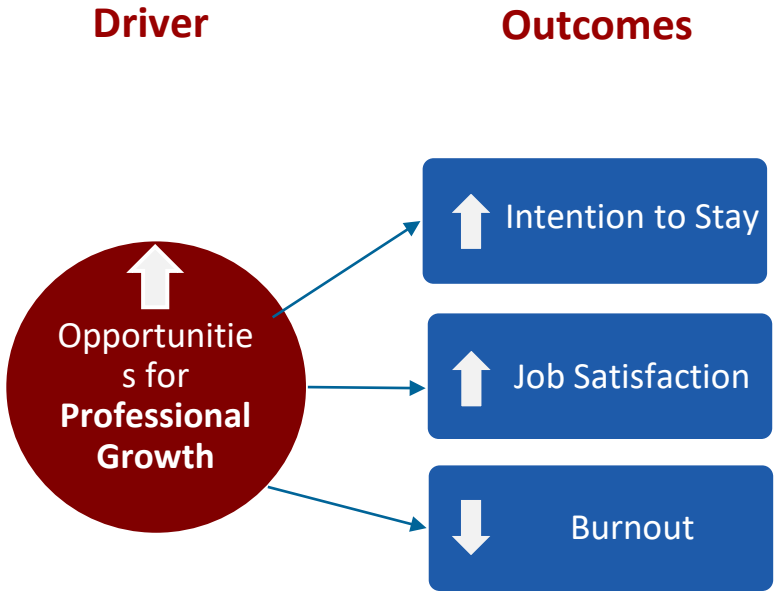
- Nearly **a third** of workers had sought out a new job because their current workplace didn't offer flexible work opportunities, such as remote work or flexible scheduling
- **Fifty-two percent** of respondents had tried to negotiate flexible work arrangements with their companies
- **Eighty percent** of those surveyed said that they would be more loyal to their employers if they had flexible work options

Source: SHRM

Work Schedules

A no or low-cost strategy for staff retention and recruitment is **work schedule innovation**. Adequate clinical coverage and on-call coverage is the highest priority for health centers, but this is not always best achieved with traditional full-time schedules. There are many advantages to part-time, flexible, hybrid, or remote schedules.

Health Center Workforce Well-being Survey Findings



Professional Growth

Overall Average Score: 4.7 out of 6.0

- *Professional Growth* is defined as: Opportunity for professional development and promotion.
- Among the top ten predictors identified for each workforce well-being outcome, **opportunities for** ***Professional Growth***:
  - **Had the strongest association with Intention to Stay**
  - Had the 2nd strongest association with Job Satisfaction
  - Had the 3rd strongest association with reduced Burnout

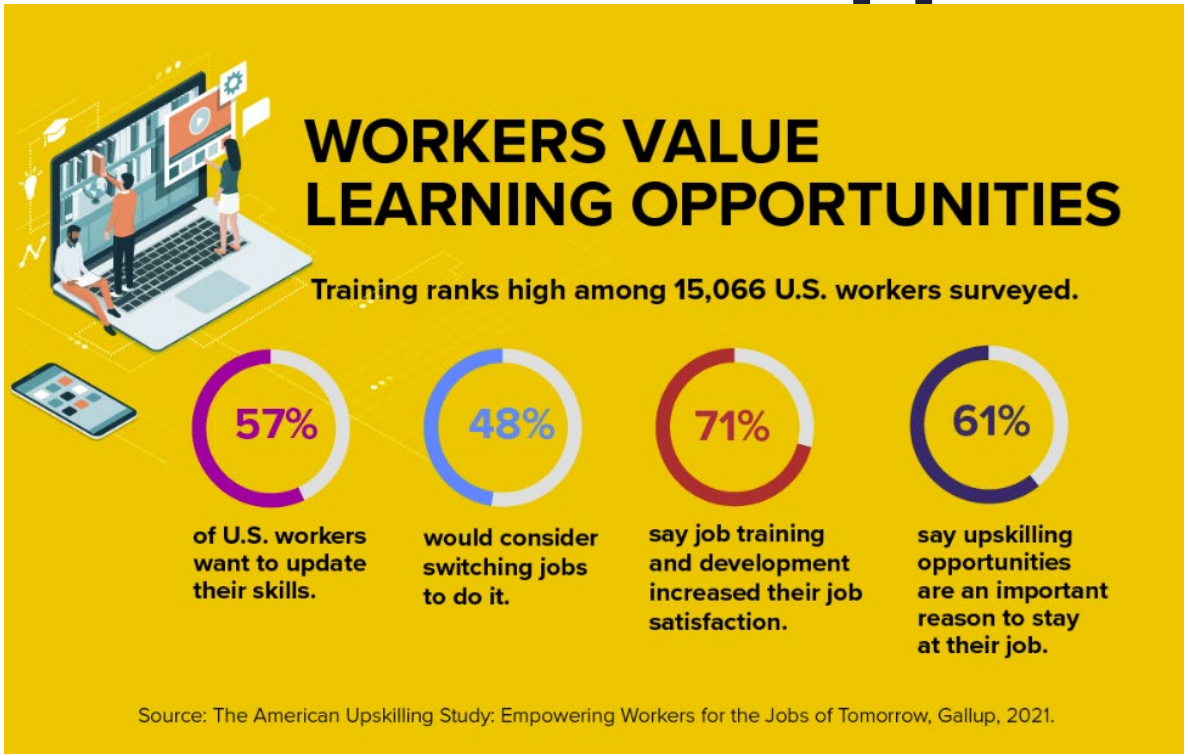
Career Paths and Development Opportunities

- Employees believe **professional development** is the number-one way to improve company culture

- **86% of professionals** said that they would change jobs if a new company offered them more opportunities for professional development

Source: Harvard Business Review

Career Paths and Development Opportunities



Source: The American Upskilling Study via SHRM

Staff Development

Evaluate Needs for Effective Programs

- Evaluate Employee & Organizational Needs
- Consider Skills Gaps
- Create Communication Plan for Opportunities

Personalize Training to Meet Employee Goals

- Offer Employees Freedom to Choose
- Intensive vs. Micro-Learning
- Include Those with Varying Goals – Leadership vs. Exploration

Enhance Organizational Culture

- Send a Strong Message About Values
- Create Welcoming Environment
- Include Employees from All Backgrounds

Continuous Learning for Management Success

- There is Always More to Learn!
- Managers Can Grow Skills for New Responsibilities
- Management and Leadership are Skills

Measuring Impact

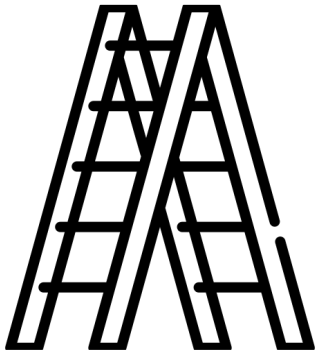
- Surveys/Evaluations
- New Behaviors Take Time
- Evaluating ROI

Source: The American Upskilling Study via SHRM

Career Paths and Career Ladders

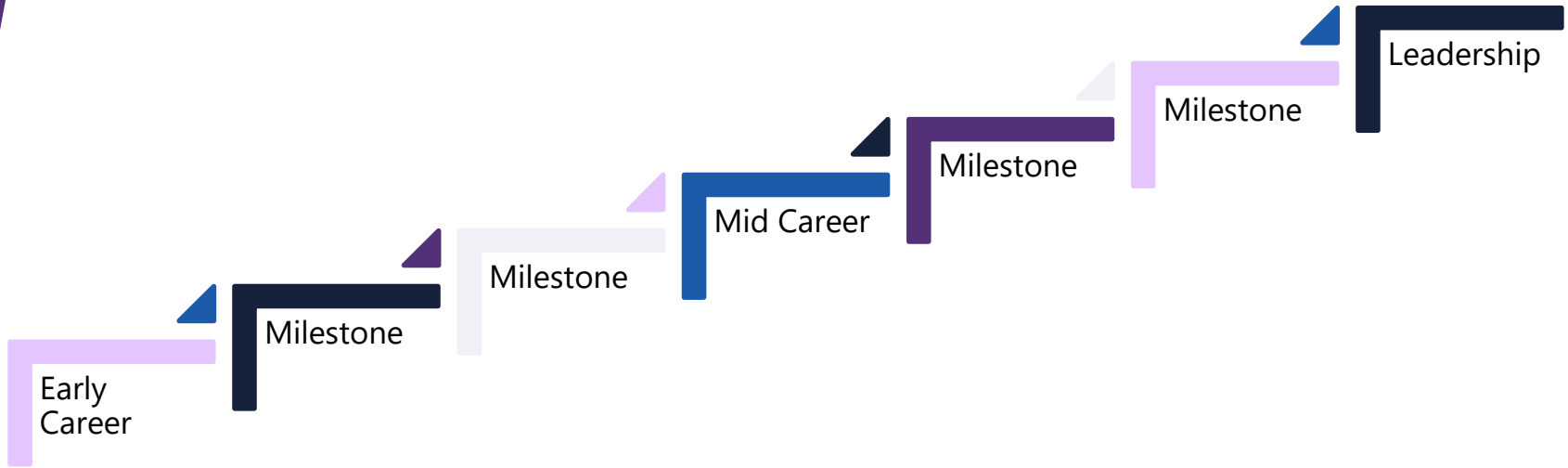
Career paths encompass varied forms of career progression, including the traditional vertical career ladders, dual career ladders, horizontal career lattices, career progression outside the organization and encore careers.

Career ladders are the progression of jobs in an organization's specific occupational fields ranked from highest to lowest based on level of responsibility and pay.

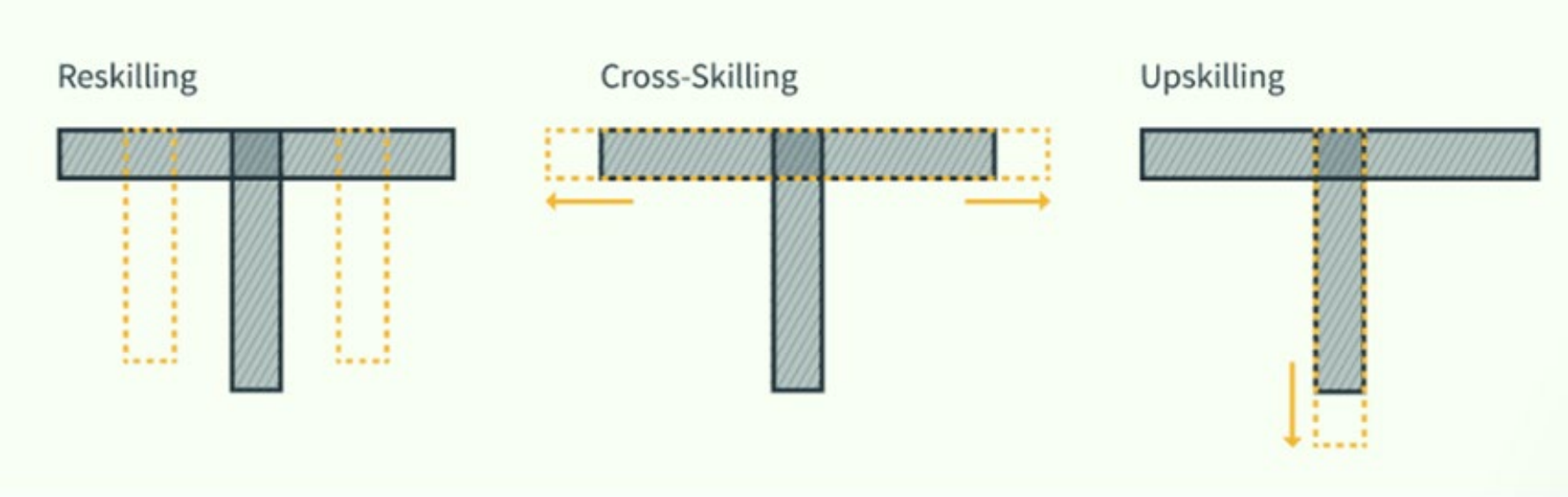


Source: SHRM; Images: Flaticon

Career Paths and Ladders: Map Out the Process



Reskilling, Upskilling, Cross-Skilling



Source: Gloat

What is ONE retention strategy that you learned today that might work at your family planning program?

Resources

- **Association of Clinicians for the Underserved** - Editable Health Center Onboarding Checklist

- **RHNTC** - Staff Support and Retention Toolkit (*contains many templates including for check-ins, stay interviews, work environment assessments, etc.)*

Thank you!

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