



Baselines and Benchmarks: Using Data to Craft a Workforce Plan

Behavioral Health Recruitment and Retention

February 7, 2024 | 12:00 p.m. – 1:00 p.m. PT



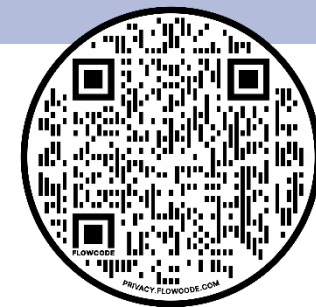
Indigenous Land Acknowledgement

- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

Whose land are you on?

Option 1: Enter your location at [Native Land CA](#)

Option 2: Access Native Land website via QR Code





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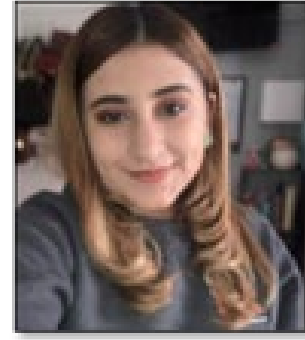
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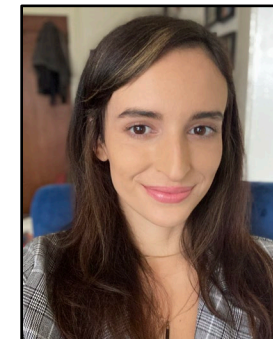
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This project would not be possible without the many amazing people who work in the background but are not on this slide.

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Agenda

1. Framing the Conversation
2. Baselines and Benchmarks: Data-Informed Planning
3. The Recruitment Plan
4. The Retention Plan
5. Q & A



Framing the Conversation

**Behavioral
Health
Recruitment
& Retention**



We Didn't Get Here Overnight

Baby boomer retirement started 10+ years ago
(Gurchiek, 2021; Haass, 2019)

Millennials leaving healthcare careers early
(Trilliant Health, 2023; Bias & Ramirez, 2019)

Gen Z is a smaller population entering the workforce
(Staglin, 2022; Dua et al., 2022)

COVID-19 exacerbated demand

Great Resignation and Big Re-Shuffle



Your Workforce is Ailing— Here's the Treatment Plan

Recruitment and retention plan will:

- Assess the level of acuity and strengths
- Assess the readiness for change
- Develop multidisciplinary team across staffing levels
- Develop indicators for success
- Develop a conceptual framework
- Determine feasible strategies given funding and resources



Poll: Does your organization have a recruitment and retention plan?



These concepts are new to us, we are just learning



Working on one or both



Only a recruitment plan



Only a retention plan



Yes, we have both

What Employees Want



Living wage
with healthcare
benefits



Opportunities to
grow and
advance



Job role clarity



Some autonomy
and input into
decisions



Manageable
workloads



Administrative
support without
a crushing
administrative
burden



Basic
orientation and
training for
assigned
responsibilities



Decent and safe
physical work
environment



Competent and
cohesive team
of coworkers



Support of an
effective
supervisor



Rewards for
exceptional
performance

What Do You Lose When Staff Leave?



Dynamic Duo: Recruitment and Retention

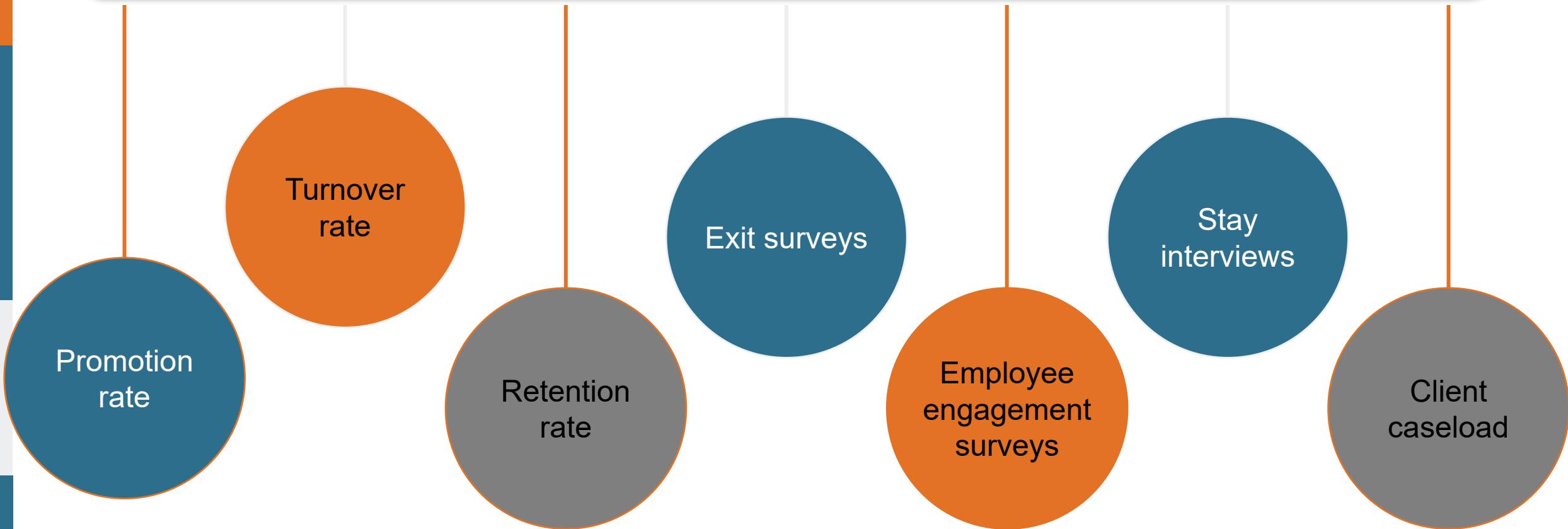


Data-Informed Planning



Talent Metrics

Baseline data used to understand patterns in aggregate and by demographic(s), job categories, and across roles:



Budget Metrics

- **Dollars expended on:**

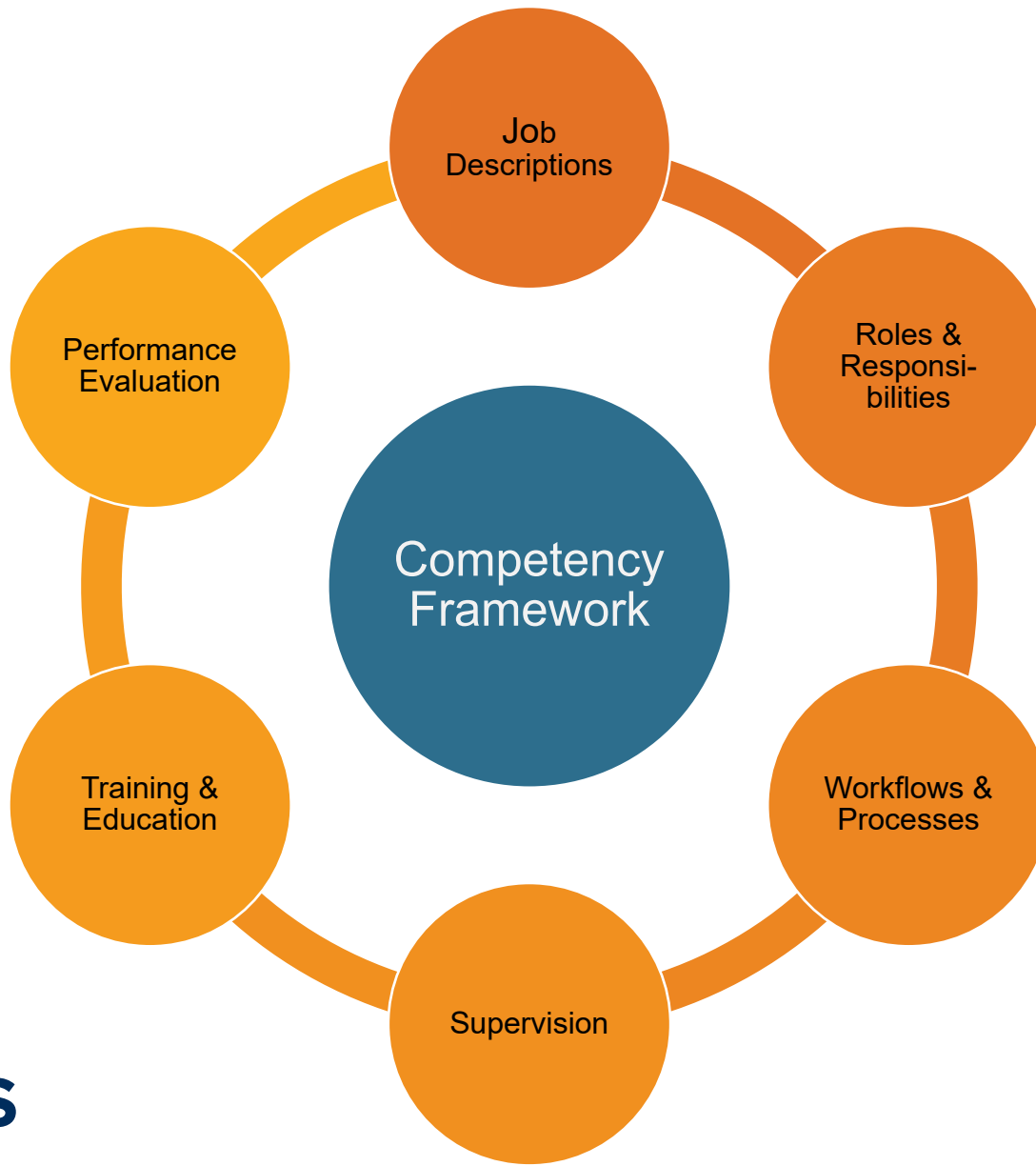
- **Salary increases (from promotions)**
- **Recruitment**
- **Hiring**
- **Onboarding**
- **Training**

- **Additional/overtime hours worked (to cover vacancies)**

- **Savings from vacancies**



Competency Framework



- **Knowledge** is the theoretical understanding of concepts.
- **Skills** require hands-on training and experience.
- **Abilities** are the strengths, attributes, and powers to perform a skill.

Using Data



Baseline

- What story does the data tell?
- What does the data tell us about how specific groups are impacted (e.g., by demographic, role, job category, department)
- In what areas do you see success, patterns, and gaps?



Benchmark

- What does success look like?
- What standards, goals, and key performance indicators (KPIs) do we need to achieve?
- What strategies need to be piloted?



Evaluation

- What progress has been made toward benchmarks?
- What patterns and gaps still exist?
- What part(s) of the plan needs to be modified?

The Recruitment Plan



Recruitment Plan



WHEN SHOULD IT HAPPEN?

The recruitment plan should be revised yearly, based on new data insights, experiences, and priorities for the upcoming year.

HOW DOES IT START?

Planning should begin with collection and analysis of baseline data, identification of gaps or challenges, and development of strategies and interventions to address them.

(Radis & Laperle, 2022, slide 19)

Recruitment Plan



WHAT IS IT?

A strategy for identifying, selecting, and retaining the most qualified and highest quality staff to build a better, more competent workforce.

WHY DO IT?

A well-planned recruitment and retention strategy increases staff satisfaction, reduces turnover, and improves workplace culture.

WHO DOES IT?

Human Resources, along with input from leadership, hiring managers, and new and seasoned staff.

(Radis & Laperle, 2022, slide 18)

Quantitative Measures

Leverage HR systems to collect and analyze relevant data.

Key analytics to analyze:

- Time to hire
- Source of hire
- Cost per hire
- Interview rate
- Hire rate

Identify staffing problems.

Choose effective approaches to address identified challenges.

Evaluate strategies and interventions.



Qualitative Measures

Measure

What It Can Tell You

New Employee Check-In

Check in with new employees to ensure they receive the necessary support and information for effective job performance. This is also an opportunity to evaluate the effectiveness of recruitment efforts in successfully onboarding the employee.

Assessment of Recruitment Activities

Analyze the impact on applicant quantity and quality:

- Evaluate the effectiveness of specific recruitment strategies employed.
- Determine the impact of different copy variations and advertising platforms on applicant response rates.
- Assess the influence of these strategies on attracting a higher number of qualified candidates.

Recruitment Plan Component: Job Description

Create competency-based job descriptions.

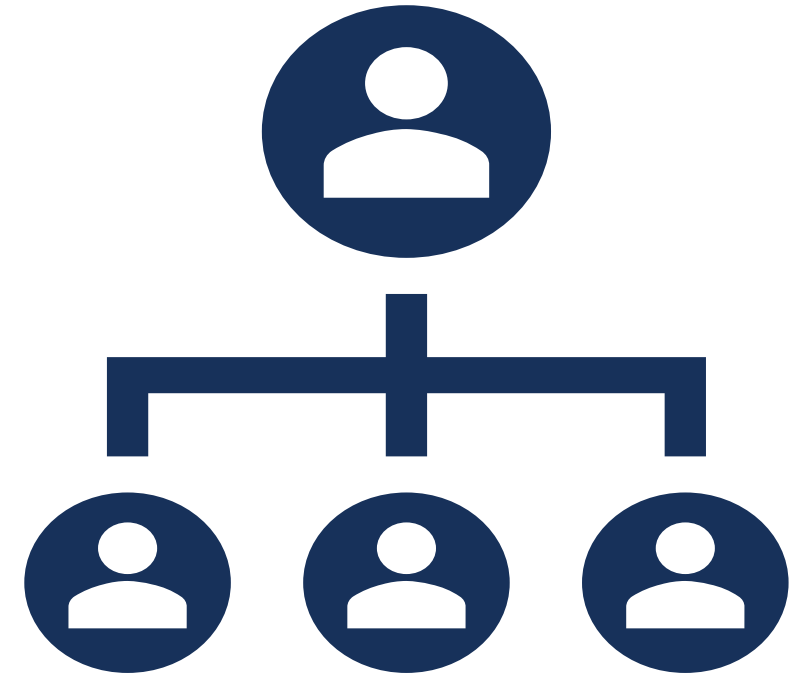
- Use competencies to design your job description.
- Conduct review of job description prior to posting.
- Gather and incorporate feedback from staff currently in the role to update job description.
- Include performance expectations using competency-based language.



Recruitment Plan Component: Organizational Charts

Create and update organizational charts.

- Supports the design of your jobs
- Describes departmentalization or grouping of jobs
- Establishes reporting relationships
- Distributes authority
- Shows coordination between jobs
- Differentiates job positions
- Illustrates potential pathways for growth



Recruitment Plan Component: Career Pathways

Establish clearly expressed career pathways in recruitment.

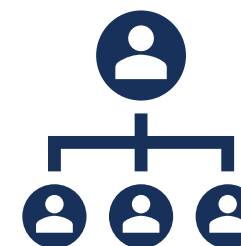
- Career pathways:
 - Attract employees
 - Reduce turnover
 - Improve engagement
 - Improve performance
 - Create clear expectations
 - Provide framework for a feedback loop



Recruitment Plan Component: Effective Marketing

Job postings and marketing reflect a competency-based approach.

- Knowledge, skills, and abilities are needed to fulfill the job.
- Interviewers can develop competency-based question banks.
- Competency-based selection encourages diversity.
- Managers can identify transferable skills for new and existing employees.



The Recruitment/Hiring Plan: Data



Just like in any treatment plan, use your baseline data to assess efficacy and progress.



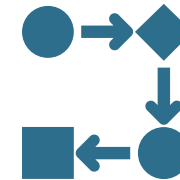
Did your planning and efforts make a difference?

Did your vacancy or turnover rate improve with new recruitment and hiring approaches?

Did turnover rates decrease?

Are employees more satisfied or engaged?

What did you learn from exit or stay interviews?



Make changes to your plan and practices based on what you learn.

The Retention Plan



Retention Plan

WHAT IS IT?

- Comprehensive strategy to reduce turnover and keep employees engaged, satisfied, and motivated.

WHY DO IT?

- To invest in your workforce, increase staff satisfaction, reduce turnover, and improve workplace culture.

WHO DOES IT?

- HR, managers, and leadership.

(Radis & Laperle, 2022, slide 18)



Retention Plan



WHEN SHOULD IT HAPPEN?

The retention plan should be revised yearly (at minimum), based on new data insights, experiences, and priorities for the upcoming year.

HOW DOES IT START?

Gather baseline data, identify gaps or challenges, develop benchmarks, and pilot strategic solutions.

(Radis & Laperle, 2022, slide 19)

Benefits of a Strong Retention Plan



Quantitative Measures

- Leverage HR systems to collect and analyze relevant data.
- Key metrics to analyze (in aggregate and across subgroups):
 - Retention rate
 - Promotion rate
 - Average tenure (in organization)
 - Average tenure in role
 - Training and development hours completed
 - Cost of attrition
 - Cost to promote
- Identify training, coaching and mentoring needs.
- Choose effective approaches to address identified challenges.
- Evaluate strategies and interventions.

Qualitative Measures

Measure	What It Can Tell You
Employee Satisfaction Survey	A feedback tool designed to collect valuable insights about the employee experience directly from employees themselves.
Stay Interviews	A feedback tool focused on understanding what motivates employees to stay with the organization. It explores areas of improvement in their work experience and discusses their vision for the next stage of their career within the organization. (Liu, 2021)
Exit Interviews	A feedback tool focused on why an employee has decided to leave their current position. This unique approach allows employers to gather insights into the factors influencing employee departures and identify potential areas for improvement within their organization.

Retention Plan Component: Job Description

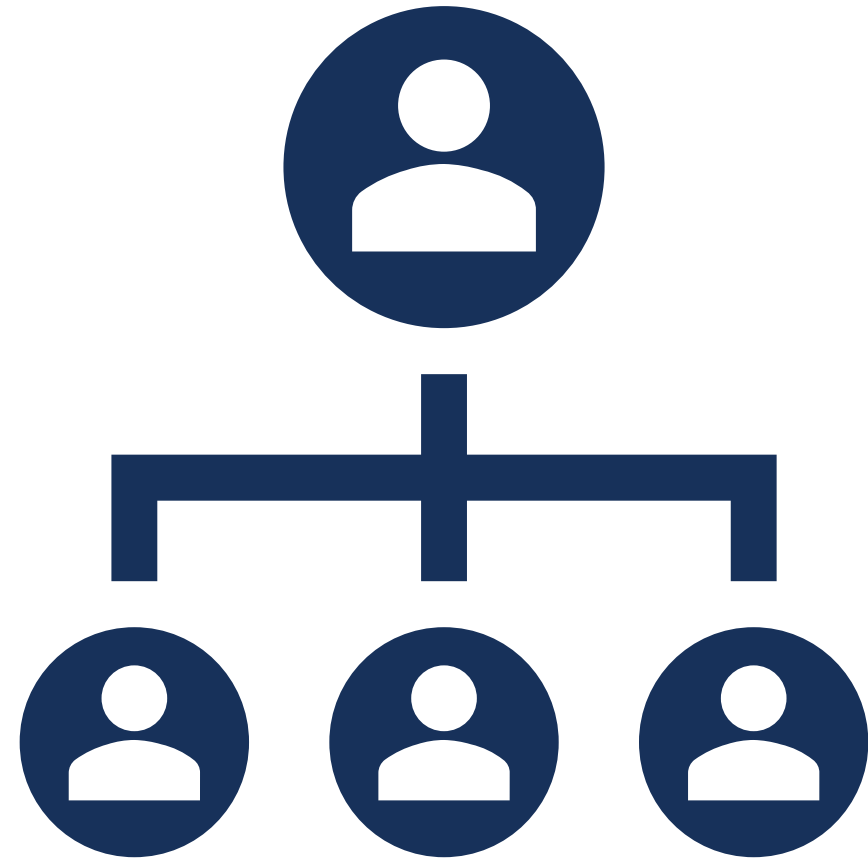


Create competency-based job descriptions.

- Use competencies to design your job description.
- Conduct yearly review of job descriptions.
- Include performance expectations using competency-based language.
- Link to performance evaluations.
- Use job descriptions to inform career pathways and growth opportunities.

Retention Plan Component: Organizational Charts

- **Create and update organizational charts.**
 - Establish reporting relationships
 - Show coordination between jobs
 - Highlight existing opportunities for growth and advancement
 - Inform training, development and career pathways programming



Retention Plan Component: Career Pathways

- **Establish transparent career pathways.**
 - Retain top achievers
 - Increase cumulative ability, experience and diversity of staff
 - Reduce turnover
 - Create clear expectations
 - Mitigate burnout
 - Clearly outline resources and supports for growth
 - Build internal pipeline to support succession planning



Retention Plan Component: Supervision and Management Skills

- **Develop clear expectations and supports for supervisors.**
- Supervision and management skills:
 - Invest in learning, growth, and advancement of staff
 - Promote employee voice and autonomy
 - Mitigate burnout
 - Encourage well-being and positive workplace culture
 - Provide framework for a feedback loop



Summary and Next Steps



Recruitment and Retention Plan Framework

Transparency and
Communication



Gather baseline data and root causes of recruitment/retention challenges.



Define goals, benchmarks, milestones, and select strategies.



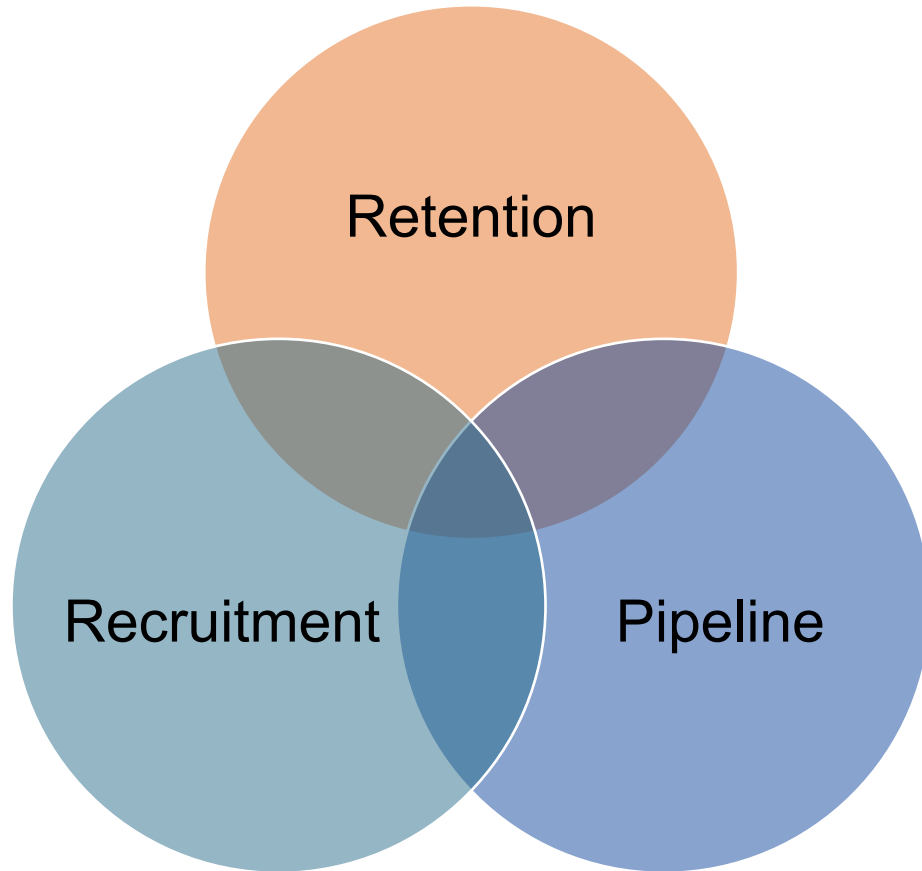
Pilot strategies and monitor outcomes.



Evaluate outcomes, identify necessary adjustments, and implement.

Engagement and Feedback

Successful Treatment: Healthy Organizations and People



The right recruitment and retention plan will:

- ✓ Identify and gather the necessary data to set baselines and benchmarks
- ✓ Meet urgent workforce needs and develop a long-term workforce strategy
- ✓ Reduce burnout and turnover
- ✓ Increase staff satisfaction and retention
- ✓ Build a strong pipeline of talent to support
- ✓ Evaluate progress on workforce goals



“

Thank you!

”

Questions?

Please enter questions in the Q&A box and/or send them to CA_BHRR@ahpnet.com



Data: Calculating Interview Rate

The number of interviews yielded from the pool of applicants.

**Number of
interviews
completed**

Divided by

**Total number of
applicants**

Times 100

Equals

Interview rate

(40

÷

100)

x 100

=

40%

Data: Calculating External Hire Rate

The number of hires yielded from the pool of external applicants.

**Number of
external hires**

Divided by

Total headcount

Times 100

Equals

**External hire
rate**

(35

÷

100)

x 100

=

35%

Data: Calculating Cost per Hire

The cost per person to recruit and hire new staff.

Dollars spent on hires	Divided by	Number of people hired during time period	Equals	Your cost per hire
\$10,000	÷	25	=	\$400

Data: Calculating Source of Hire

Each source will need its own calculation.

Number hired from source	Divided by	Total number of employees hired from all sources	Times 100	Equals	Your source of hire rate
(10	÷	40)	x 100	=	25%

Data: Calculating The Time to Hire

**Day candidate
accepted job**

Minus

**Day candidate
entered pipeline**

Equals

Your time to hire

(28

-

10)

=

18 days

Calculating Turnover Rate

The number of “leavers” corresponds to your turnover rate.

Number of leavers	Divided by	Number of people employed	Times 100	Equals	Your turnover rate
(50	÷	175)	x 100	=	28.6%

Calculating Average Tenure

Average tenure can be calculated for stayers or leavers.

- List each worker and the number of months the worker has been at the organization.
- The sum of months worked divided by the number of employees is the average tenure.

Number of months “staying” for current employees:

• 1 employee “staying” 3 years (1 x 36) =	36
• 5 employees “staying” 12 months (5 x 12) =	60
• 2 employees “staying” 10 months (2 x 10) =	20
• 2 employees “staying” 3 months (2 x 3) =	+ 6
Total =	122

Total months “stayed”	Divided by	Number of current employees	Equals	Average tenure of “stayers”
122	÷	10	=	12.2 months

Calculating Retention Rate

The number of “stayers” corresponds to your retention rate.

Number of stayers	Divided by	Number of staff (over a period of time)	Times 100	Equals	Your retention rate
(90	÷	100)	x 100	=	90%

Calculating Promotion Rate

Total number promotions	Divided by	Number of people employed	Times 100	Equals	Your promotion rate
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(9	÷	175)	x 100	=	5.1%
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Calculating Vacancy Rate

The percent of vacant positions over a period of time.

Number of vacant positions	Divided by	Total number of positions	Times 100	Equals	Your vacancy rate
(13	÷	125)	x 100	=	10.4%

Resources

[BHRR Establishing Benchmarks Fact Sheet \(buildingcalhhs.com\)](https://www.bhrr.org/resources/fact-sheet)

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