**Health Center Name**
**Comprehensive Workforce Plan Template**

**Last revised 2/16/2021**

**Strategic Goals of Comprehensive Workforce Plan**

What is your health center’s goal in developing a comprehensive workforce plan?

How will having a comprehensive workforce plan help your health center in both short term and long-term workforce strategies?

**Example:**

Health Center name strives to have the right people in the right jobs at the right time. This happens by knowing the current workforce capabilities, planning future scenarios, determining the desired workforce, and taking steps to achieve the desired results. Our plan encompasses forecasting, recruitment, leadership development, career paths, retention planning, and pipeline development.

**Part One: Planning and Preparation**

**Assessment Strategies**

**Example:**

This section could encompass a planning chart over a one or three year period to determine the high-level needs of the organization over time so you can begin to strategically think about ways to fill those vacancies.

1. Determine why you need a provider or staff member.
2. What is causing this need?
3. What type of provider or staff member would best fit this need?
4. How many hours at they needed (part-time vs full-time)

**Use Table 1 below if looking for a provider.**

**Table 1. Weekly Asset Matching – Providers, Support, Exam Rooms**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Team A** | **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** |
| AM | Providers |   |   |   |   |   |
|   | Support |   |   |   |   |   |
|   | Rooms |   |   |   |   |   |
| PM | Providers |   |   |   |   |   |
|   | Support |   |   |   |   |   |
|   | Rooms |   |   |   |   |   |
|  |  |  |  |  |  |  |

**Table 2. Strategic Planning for Retirement, Extended Leave, and Changes in FTE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Provider/Staff** | **Provider/Staff Age Range** | **Over Age 50** | **All Ages** |
| **< 50** | **51 - 60** | **61+** | **Discussed retirement? (Y/N)** | **Planned Age for Retirement** | **Major Leave Plans** | **Expected Changes in FTE** |
| Provider/Staff 1 |   |   |   |   |   |   |   |
| Provider/Staff 2 |   |   |   |   |   |   |   |
| Provider/Staff 3 |   |   |   |   |   |   |   |

**Gain Support for the Staff Recruiting Effort**

1. Consider medical communities and local stakeholders that would help in your recruiting efforts.
**Examples:**
Hospital for referral services
Community Growth Alliance/Chamber of Commerce
Realtors

 Iowa Workforce Development

1. Develop relationships with local colleges/trade schools
**Examples:**
Community Colleges

Iowa chapter of Social Work or other professions

1. Share job posting materials with local stakeholders and community organizations
**Examples:**
Community Growth Alliance/Chamber of Commerce
Community Colleges or schools
Community social media

**Form a Recruitment Team**

1. Who will be on your core and support team for each position type (Primary care, behavioral health, dental, front desk, billing, etc.)
**Examples:**
Hiring/Clinic Manager and HR for staff
Hiring/Clinic Manager, CEO, HR, Provider Team, using relator for Site Visit?
2. Contact Chamber of Commerce to provide information about the area for marketing package (example: Peoples)

|  |  |  |  |
| --- | --- | --- | --- |
| **Specialty** | **Primary Contact** | **Secondary Contact** | **Additional Support Staff** |
| Primary Care |  |  |  |
| Behavioral Health |  |  |  |
| Dental |  |  |  |
| Other health center staff |  |  |  |

**This chart describes the candidate’s primary contact for moving the recruitment forward, secondary contact if the primary contact is out of office, and any additional support contacts needed to move the candidate from application to hire date.**

**Define Your Opportunity**

1. Create job description, update existing descriptions
Include areas needed to be in a job description or where the templates can be found.
2. What will their typical day look like?
Be prepared to answer this question and think about if there is a standard answer and who would be appropriate to answer it.

**Job postings perform better with the following details included:**

1. Who will be on their team?
2. Patient demographics
3. Patient volume
4. Practice setting- team based or solo
5. Clinical facilities- describe size, layout, age, condition, technology
6. Hospital facilities- describe relationships with local hospitals

**Define Your Community**

1. Demographics
[Text]
2. Location- create a written and pictorial description of the community
[Text]
3. Economy- define economic health of the area
[Text]
4. Local organizations- highlight professional, social, and civic organizations in the community
[Text]
5. Shopping
[Text]
6. Education- describe preschool through high school education system
[Text]
7. Culture

[Text]

1. Ensure that any comments on culture reflect the culture of the community and are not discriminatory.
[Text]
2. Recreation- what do residents of the area do for fun?
[Text]

Employment opportunities for spouse/partner/family
 [Text]

**Define Your Compensation Package**

1. Compensation and Incentive Arrangement
[Text]
2. Benefits
[Text or place below]
3. Non-Monetary Benefits

[Text or place below]

**Table 3. Benefit Review**

|  |  |  |  |
| --- | --- | --- | --- |
| Benefit | Details | Review Results | Action Plan |
| Vacation  | 3 weeks, 4 weeks after 5 years, 5 weeks after 10 years | Competitive | None |
| Holidays |  |  |  |
| Sick |  |  |  |
| Educational Leave |  |  |  |
| Educational Travel |  |  |  |
| Educational Conference  |  |  |  |
| Health Insurance |  |  |  |
| Dental Insurance |  |  |  |
| Life Insurance |  |  |  |
| Disability Insurance |  |  |  |
| Retirement Plan |  |  |  |
| Loan Repayment |  |  |  |
| Other (specify) |  |  |  |

**Define Ideal Candidate**

**Job postings perform better with the following details included:**

1. Part time or full time
2. Experienced or newly graduated
3. Work ethic
4. Career goals

**Develop a Recruitment Budget**

1. Market compensation studies, making sure budget is aligned with finance
2. Promotion/Publicity Items
3. How will you promote your openings? (non-advertising)
4. Advertising
Where will you advertise the openings?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Recruitment Budget | 25th % (Min) | 50th % (Med) | 75th % (Max) | Ideal Salary | Additional Fees |
| Area Compensation Studies |   |   |   |   |   |
| Iowa PCA Salary and Benefit Survey |   |   |   |   |   |
| NACHC Salary Survey |   |   |   |   |   |
| Other |   |   |   |   |   |
| Other |  |  |  |  |  |
| Average of ideal salary  |  |  |  |  |  |
| Placement Fees |  |  |  |  |  |
| Benefits  |   |   |   |   |   |
| Advertising Costs |   |   |   |   |   |
| Total salary plus additional fees |  |  |  |  |  |

**Part Two: Recruitment**

1. Diversity, Equity, and Inclusion
**How will you take into consideration Diversity, Equity, and Inclusion (DE&I) in your hiring practices?**
- Interviews
-Job Postings
-Policies

**You can use the below chart for b/c.**
2. Temporary Staffing & Contract work
3. Sources of Recruitment

**Table 4. Recruiting Firm Contact Information and Notes**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Contact Name | Phone | Email | Address | Fees | References | Date Last Used | Position Filled | Rating 1-5 |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |   |   |

**Table 5. Media Outlet Information**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Media Outlets | Contact Name | Phone | Email | Timing | 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  |   |   |   |   |   |   |

1. Screening the Candidate: Background Checks and Behavioral Assessments

**Example:** Screening tools, EX: Predictive Index, behavioral assessments, Inquire Hire

1. Conduct Credential Checks
Who is responsible and do you use an external company?
2. Interview the Spouse
Do you currently interview spouses to get an understanding of what they are looking for? If not, do you want to consider doing so as part of your workforce plan?
3. Check References
Who is responsible, process, and company used.
4. Conduct onsite visit

|  |  |  |  |
| --- | --- | --- | --- |
| 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 |   |   |   |

1. Follow Up and Follow Through

**Table 6. Candidate Follow Up Plan**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Stage | Frequency | Timeline | Type of Contact | Responsible Person |
| Application Received |   |   |   |   |
| 1st Telephone Interview |   |   |   |   |
| 2nd Telephone Interview (if applicable) |   |   |   |   |
| 1st Visit |   |   |   |   |
| 2nd Visit (if applicable) |   |   |   |   |
| Offer |  |  |  |  |

1. Follow Up Letter
2. Follow Up Negotiations

**Part Three: Retention**

1. Welcome and orient new staff member to community
Who is responsible?
2. Onboarding
Who does the onboarding and is there a template? If so where is it located?
3. Assign a mentor to orient new staff member
How is a mentor assigned?
4. Funding career and personal development opportunities
Do you utilize any development plans at your organization?
5. Turnover Metrics
Voluntary Organization Turnover =X
Involuntary Organization Turnover =X
Voluntary Provider Turnover = X
Involuntary Provider Turnover = X
6. Performance Management

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Retention | Gaps/Barriers | Opportunities | Strategies for Improvement | Timeline |
| Mission |   |   |   |   |
| Compensation |   |   |   |   |
| Benefits |   |   |   |   |
| Work Schedules |   |   |   |   |
| Career Path |   |   |   |   |
| Turnover |  |  |  |  |
| Other |  |  |  |  |

1. Maintain competitive advantage for salary and benefits
2. Leadership Development
What programs are in place to train leaders?
3. Employee Engagement
When does your survey go out?
Who is responsible for it?
What is the process to do something with the information?
4. Recognition Programs **EX:** years of service, Kudos program, verbal recognition, contests, positive comments shared with entire workforce at annual all staff meeting.
[Text]
5. Stay Interviews, Pulse Interviews
How do you ensure stay interviews are incorporated at the organization?
6. Exit Interviews
How are you using exit interviews to make improvements over time?

**Table 7. Provider and Non-Provider Staff Members Contributing to Health Center Mission**
**You could use this chart to name those who are great at contributing to the mission and culture of the organization. These people would be excellent resources for new hires to meet with.**

|  |  |
| --- | --- |
| Name | Position |
|  |  |
|  |  |
|  |  |

**Part Four: Pipeline Action Plan**

1. Partnerships
What partnerships do you already have in place?
What partnerships are you interested in developing further?
2. Preceptors and availability, technology, and virtual preceptorships
Process for Preceptor request. Who is in charge?
How do we ensure we meet with those rotating, so we ensure pipeline development? (This could include the Iowa PCA Workforce team in the future)
3. Funding
How will we fund the partnership development or program development?
Who has the capacity internally to take on any additional ideas?
4. Plans for Grow Your Own
[Text]- The Iowa PCA will be hosting T/TA based on the RTAT data that will help determine the information in part four.