

# Workforce Workshop: Management and Leadership Training for Retention

Suzanne Speer, Senior Director of Workforce Development  
Michelle Fernández Gabilondo, Associate Director of Workforce Development  
Helen Rhea Vernier, Senior Training Specialist  
*Sunday, July 23, 2023*



Access to Care & Clinician Support

Recruitment & Retention

National  
Health  
Service Corps

Resources

Training

Networking

[Learn more about what we do.](#)

# YOUR SPEAKERS



**SUZANNE SPEER**  
*(she/her)*  
**Senior Director, Workforce  
Development**  
[sspeer@clinicians.org](mailto:sspeer@clinicians.org)



**MICHELLE FERNÁNDEZ  
GABILONDO, DSW, MSW**  
*(she/her/ella)*  
**Associate Director of Workforce Development**  
[mfernandez@clinicians.org](mailto:mfernandez@clinicians.org)



**HELEN RHEA VERNIER, MSC**  
*(she/her)*  
**Senior Training Specialist**  
[hvernier@clinicians.org](mailto:hvernier@clinicians.org)

# TODAY'S AGENDA

- I. Welcome & Setting the Stage
- II. The Role of Managers in Retention
- III. Management & Leadership Styles
- IV. Break
- V. High Functioning Managers: Retention, Skill Building, & Training
- VI. Break
- VII. Manager Training Plans
- VIII. Wrap-Up and Q&A



# LEARNING OBJECTIVES

- Understand the importance of developing high-functioning managers.
- Identify the key role managers play in advancing a health center's retention and recruitment efforts.
- Identify the importance of developing effective communication and leadership skills for high-functioning managers.
- Begin to develop a manager training plan as part of the health center's overall comprehensive workforce plan.



# GET TO KNOW YOUR TABLEMATES!



LET'S HEAR FROM YOU!



menti.com  
4544 3804





# WORKFORCE IS THE FUEL

---

A health center with a full tank identifies workforce as an essential organizational issue, invests in appropriate operational and staffing resources, and has some key features...



# Core Components

Data-Informed  
Workforce Plan

Equitable &  
Effective  
Compensation  
Structure

Positive Culture  
Focused on  
Engagement

Tested  
Recruitment &  
Retention  
Strategies

Health  
Professions  
Training Program

Chief Workforce  
Officer

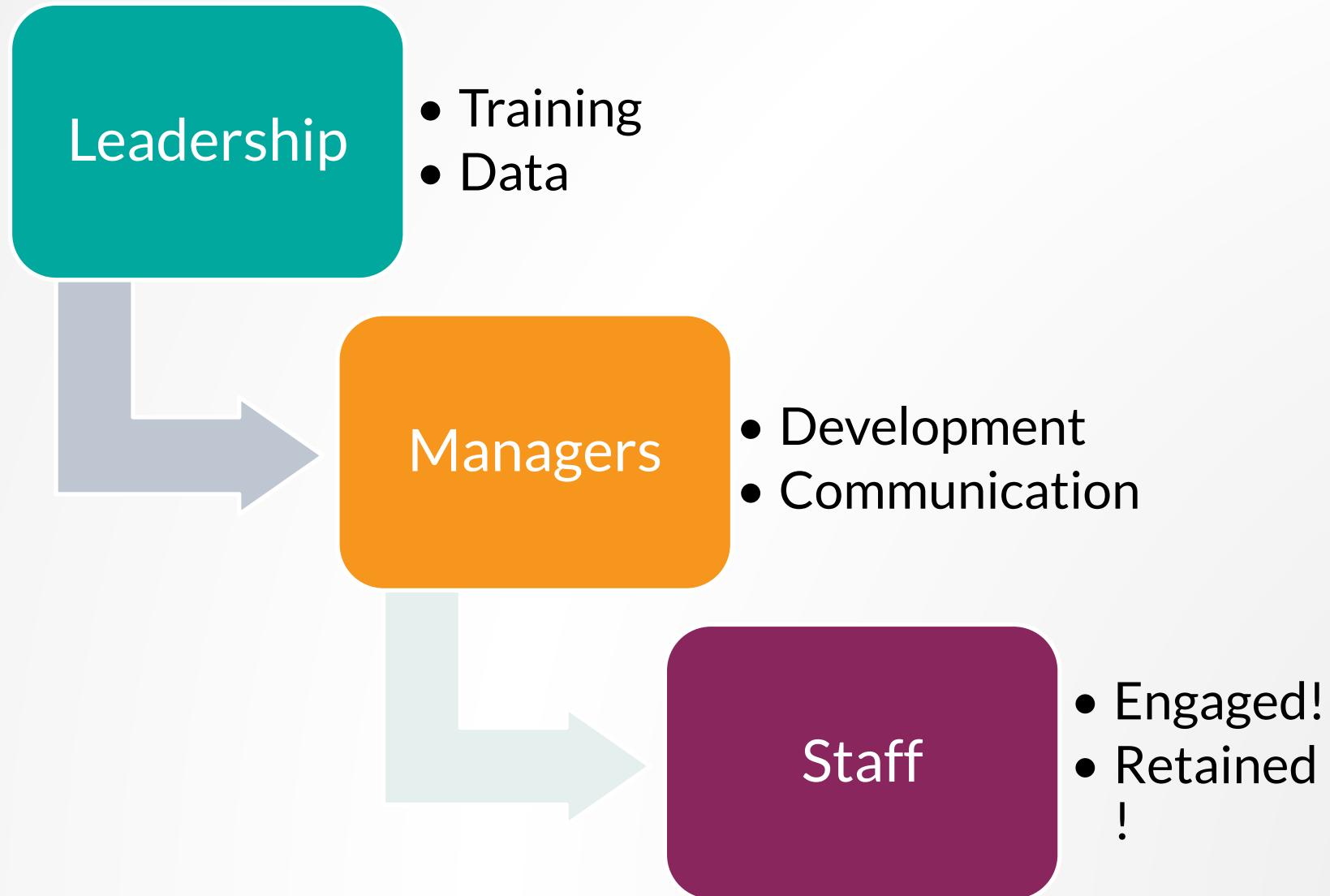
High-Functioning  
Managers

Policies that  
Support Diversity  
& Cultural  
Respect

# High-Functioning Managers

Identifies the key role of managers in developing and engaging staff and invests in their training with the expectation of staff retention.

# HIGH-FUNCTIONING MANAGERS





---

# THE ROLE OF MANAGERS IN RETENTION

LET'S HEAR FROM YOU!



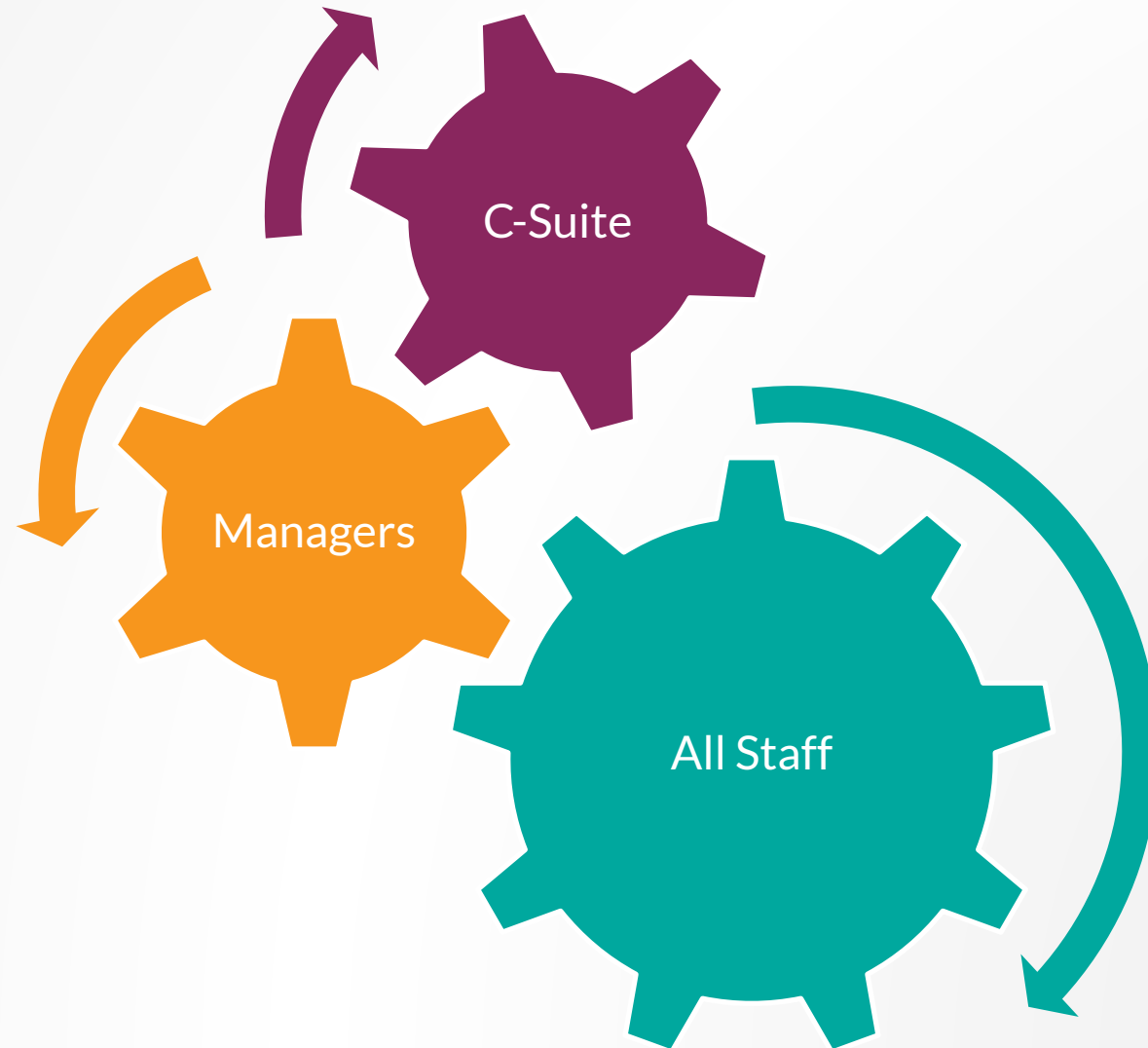
menti.com  
4544 3804



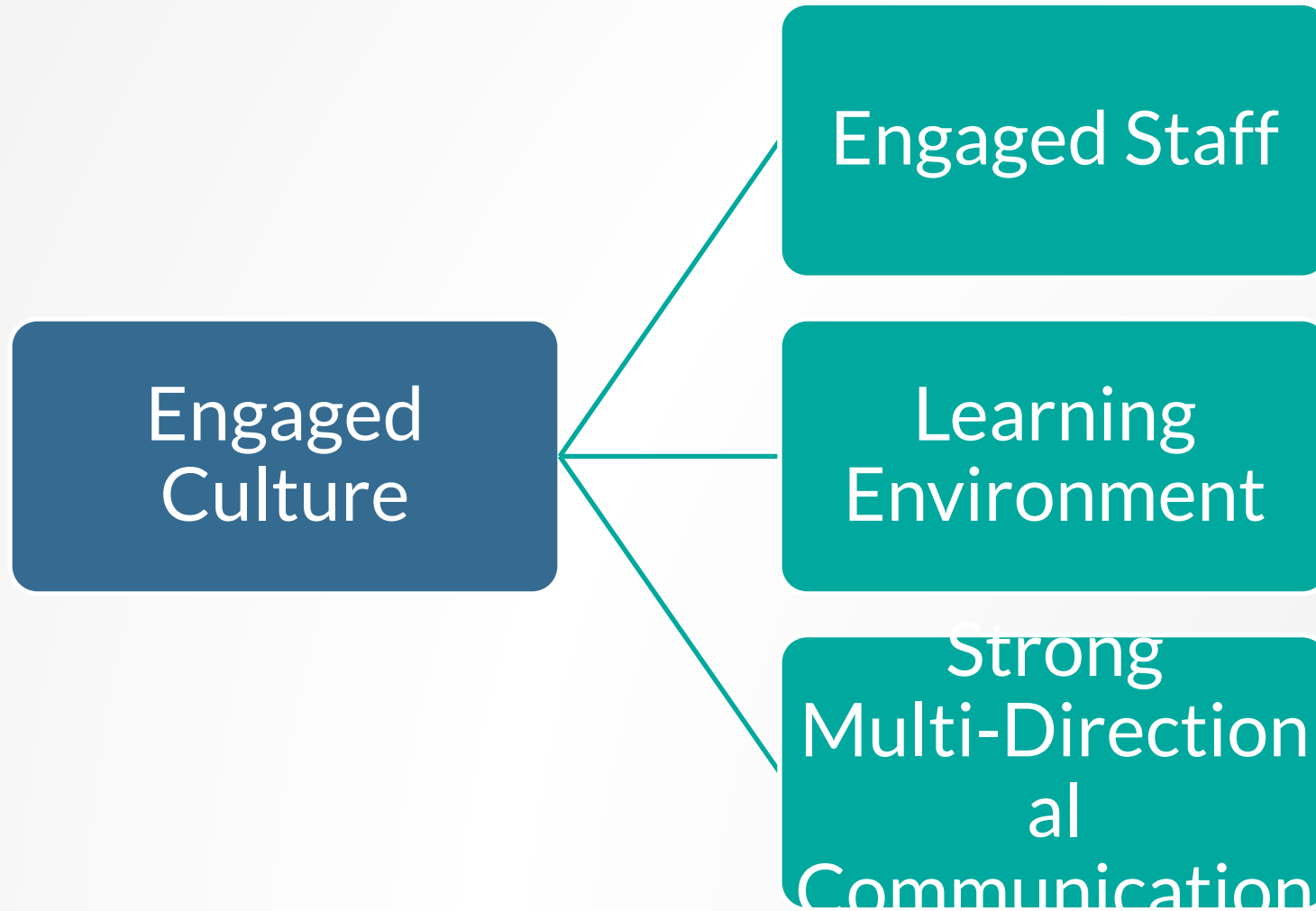
# MANAGERS' ROLE IN RETENTION



# MANAGERS & EMPLOYEE EXPERIENCE



# MANAGER'S ROLE





# RETURN ON INVESTMENT



- Separation Costs
- Vacancy Costs
- Recruitment Costs
- Onboarding Costs

Description	Input Value	National Estimate	Select Estimate
<b>Salary Information</b>			
<a href="#">Click to Use All Estimates</a>			
Business Office (Patient Accounts/Billing) Salary and Benefits per hour		\$ 42.00	<input checked="" type="radio"/> Business Office
CEO/Administrator Salary and Benefits per hour		\$ 78.00	<input type="radio"/> CEO/Admin
Chief Medical Officer Salary and Benefits per hour		\$ 182.00	<input type="radio"/> CMO
Human Resources Salary and Benefits per hour		\$ 42.00	<input type="radio"/> HR
IT Hourly Rate plus benefits		\$ 38.00	<input type="radio"/> IT
Leaving Provider Salary plus benefits for length of vacancy		\$345,000	<input type="radio"/> Leaving Provider
Nurse/MA Hourly Rate plus benefits		\$ 53.00	<input type="radio"/> Nurse/MA
Other Providers Average Hourly Rate plus benefits		\$ 166.00	<input type="radio"/> Other Providers
Support Staff Salary and Benefits per hour		\$ 29.00	<input type="radio"/> Support Staff
<b>Outside Recruiting Expenses</b>			
Recruiting Service		\$ 20,000	<input type="radio"/> Recruiting Service
Advertising Costs (2 national journal print ads, 1 national online service x 3 mths)		\$ 14,550	<input type="radio"/> Advertising
<b>Leaving Provider Practice Information</b>			
Average patient visits per day by leaving provider		12	<input type="radio"/> Patient Visits
Average revenue/collections per visit		\$ 205	<input type="radio"/> Revenue per Visit
Malpractice Tail Coverage (if any)		\$ 10,000	<input type="radio"/> Malpractice
<b>Locum Tenens or Temporary Provider Arrangements</b>			
Estimated length of vacancy in work days		120	<input type="radio"/> Length of Vacancy
Locum Tenens daily rate		\$ 1,600	<input type="radio"/> Locum Tenens
Housing Expense (per month)		\$ 1,350	<input type="radio"/> Housing
Travel		\$ 330	<input type="radio"/> Travel
Estimated patient visits per day by Locum Tenens		7	<input type="radio"/> Locum Patient Visits
<b>Interview Expense</b>			
Number of in-person interviews		4	<input type="radio"/> # In-Person Interviews
Hotel Expense per night (2 nights per interview)		\$ 220	<input type="radio"/> Hotel
Travel Expense per interview		\$ 330	<input type="radio"/> Interview Travel
All Staff breakfast with candidate per interview		\$ 360	<input type="radio"/> Staff Breakfast
CMO lunch with candidate per interview (incl. candidate and guest)		\$ 60	<input type="radio"/> CMO Lunch
Number of people included in interview dinner per interview		10	<input type="radio"/> Dinner Part. Number
Interview Dinner Cost per person per interview, including tax and gratuity		\$ 36	<input type="radio"/> Dinner Cost per Person
Cost of other interview items, such as gift baskets, baby sitting service		\$ 150	<input type="radio"/> Other Interview Costs
<b>Hiring Expenses</b>			
Relocation Costs		\$ 10,000	<input type="radio"/> Relocation Costs
Signing Bonus		\$ 25,000	<input type="radio"/> Signing Bonus
Publicity Costs		\$ 250	<input type="radio"/> Publicity Costs
Other Costs (ex: lab coats or scrubs, other individual equipment)		\$ 180	<input type="radio"/> Other Hiring Costs

Source: STAR<sup>2</sup> Center Comprehensive Workforce Plan Template



---

# MANAGEMENT & LEADERSHIP STYLES

menti.com  
4544 3804

What are some  
characteristics that  
come to mind when you  
think of leaders?



# LEADERSHIP CHARACTERISTICS

agility empathy  
learning respect  
courage communication  
delegation gratitude  
influence  
self-awareness  
integrity

# IMPACTFUL LEADERSHIP

Empathy



Humility

Vulnerability

# LEADERSHIP STYLES

Which Is Yours?

- Visionary
- Transformational
- Democratic
- Coaching
- Affiliative
- Adaptive



QUIZ TIME!

# What's Your Leadership Style?

[tinyurl.com/ycpzc87a](https://tinyurl.com/ycpzc87a)



## REFLECT WITH YOUR TABLEMATES!

- Was there anything surprising in the quiz or its results?
- How accurate do you think the results are?
- Is there anything you'll take away from this short reflection as you continue to lead and manage at your organization?





# COMMUNICATION

## What Is A Leadership Communication Style?

- Action-Oriented
- Based on Three Pillars
  - Imprint
  - Functions
  - Motivations
- Preferred Way of Communicating
  - Directive and to the point
  - Expressive, warm, and personal
  - Methodical, step-by-step
  - Analytical
  - Asking Questions



# COMMUNICATION

## Styles & Effectiveness

### Listening

Listen more than you speak

Listen for what's not being said as well

### Coaching

Help to develop your employees

Combination of teaching and advising

### Teaching

Use when you see someone struggling with a particular skill

Laying the foundation and explaining the benefits

### Directing

Specifies the steps needed to move forward

Directing ≠ Dictating

### Advising

Providing clarity on a specific situation

Offering solutions

### Motivating

Encouraging your team

Know your team and what works best for them

### Delegating

Transfer of responsibility to employees

Hands off but still offer guidance

# Time for a Break

(10 minutes)

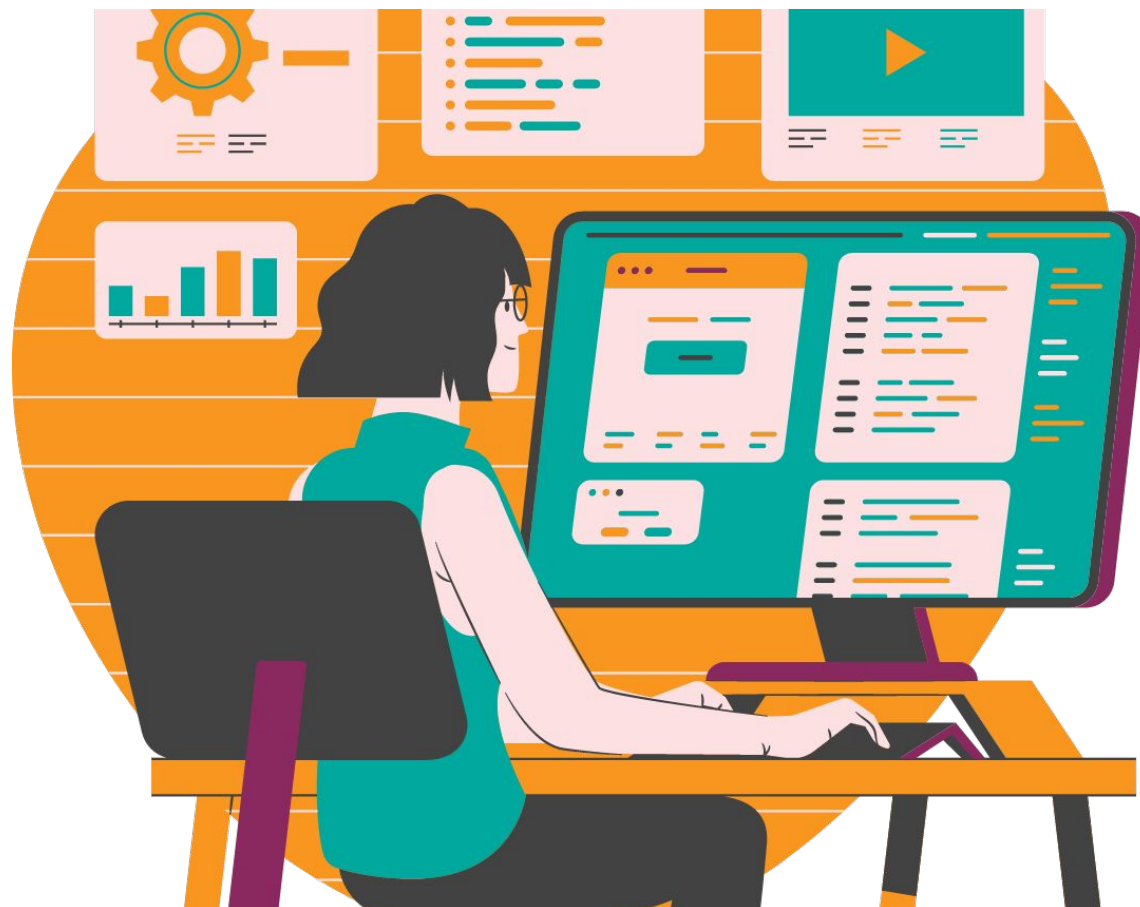




---

# HIGH-FUNCTIONING MANAGERS: RETENTION, SKILL-BUILDING, & TRAINING

# AREA OF IMPACT: STAFF DEVELOPMENT



menti.com  
4544 3804

How are managers at  
your organization  
currently involved in  
staff development  
planning?



# SKILL REQUIRED: CAREER DEVELOPMENT



Development  
Planning

Staff  
Engagement

Opportunity  
Identification

# EXAMPLES OF TRAINING TOPICS

Vertical  
Career  
Pathways

Horizontal  
Career  
Pathways

Locating  
Appropriate  
Training

Formal  
Development  
Plan  
Evaluation



# CAREER PATHS

## Key Steps



Disclose skills- and competency-based career paths

Determine the required skills and competencies to reach various roles or career stages

Identify available training and professional development resources for employees to gain those skills

Clearly and consistently communicate that information to employees

# DEVELOPMENT STRATEGIES



- Provide professional development, continuing education, and mentorship
  - Ensure it meets the needs of BIPOC individuals and other underrepresented/diverse groups
- Remember, experience is as important as education
- Invest in career ladders that train a diverse and inclusive group of employees for the successful and equitable achievement of leadership positions



---

# MANAGER TRAINING: IMPORTANCE & PLANNING

# Leadership is a skill that can be developed.



Source: [Center for Creative Leadership \(CCL\)](#)

# LEADERSHIP TRAINING

Why is it important?



# EXAMPLES OF TRAINING TOPICS



Giving  
Performance  
Feedback

Recognizing  
Excellence

Difficult  
Conversations

Data Analysis

Scheduling &  
HR Topics

Project  
Management

Creative  
Problem  
Solving

Job-Specific  
Skills

Finance &  
Budgeting

# LEADERSHIP TRAINING

## Techniques



### Assessment Instruments

- Strengths Deployment Inventory (SDI)
- Myers-Briggs Type Indicator (MTBI)

### Multirater (360-degree) Feedback

- Measurement of leadership performance from relevant viewpoints

### Coaching

- Helps individuals understand their assessment data and apply it to real-life situations

### Mentoring

- A form of coaching in which a more senior person participates actively in the professional development of a junior person

# LEADERSHIP TRAINING

## Techniques Continued



### Leader-to-Leader Development

- Can result in benefits such as knowledge transfer, confidence building and open collaboration

### Emotional Intelligence Development

- The ability of an individual to be sensitive and understanding to the emotions of others, as well as to manage their own emotions and impulses

### Work Experiences Stretch Assignments, and Rotational Assignments

- Coaxes leaders out of their comfort zones and challenges them to employ new strategies to deal with change

### Group-Based Leadership Development

- Helps employees attain real-world skills in real time



# LEADERSHIP TRAINING

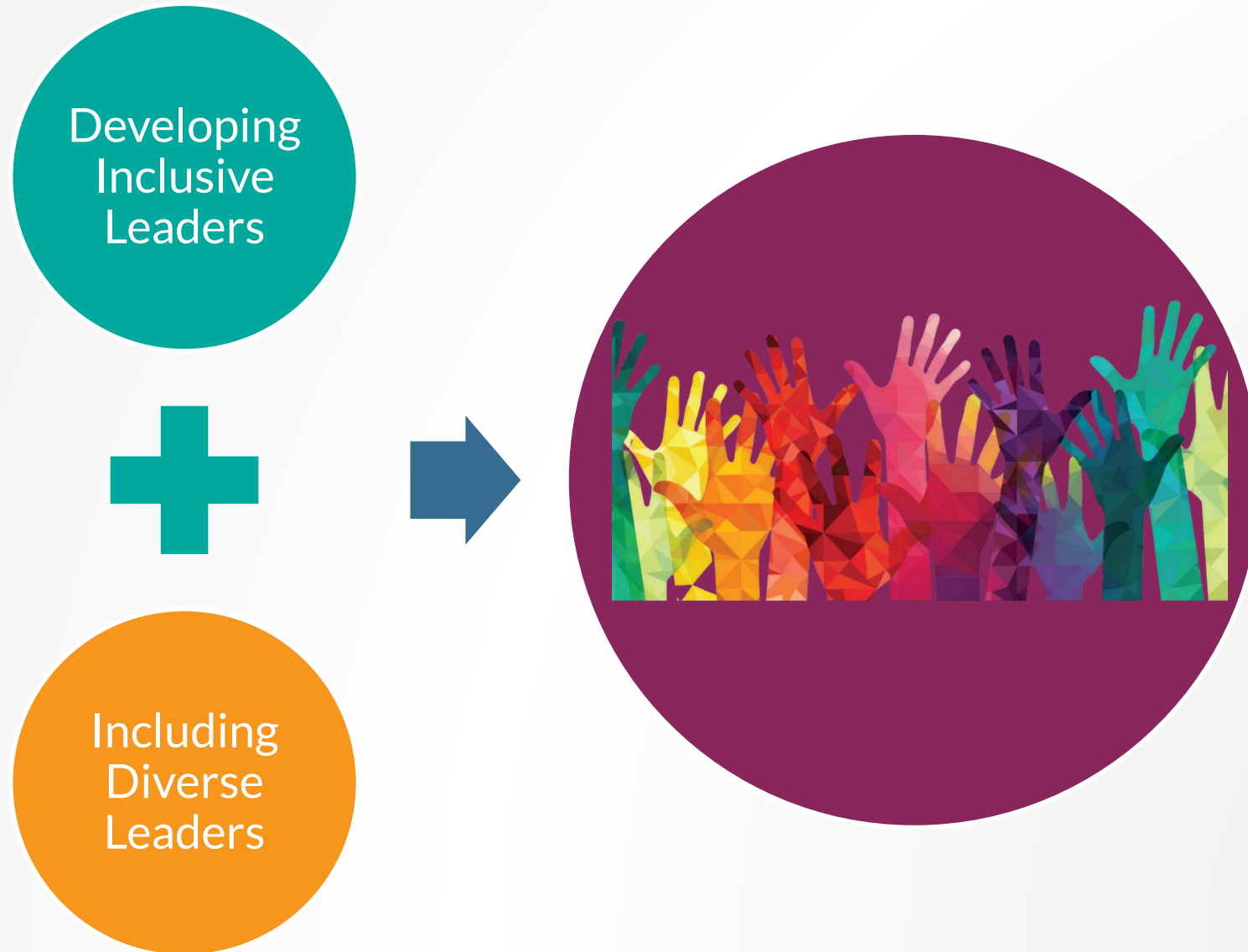
How can you make it happen?

1. Define your organization's management needs
  - a. Consider any management gaps
  - b. Review short- and long-term strategic goals
  - c. Reflect on what leadership means to your organization and the role you expect managers to play
2. Develop, don't train
  - a. Nurtured and developed rather than manufactured
  - b. Mentoring and coaching
  - c. Classroom/online learning
3. Identify potential managers (and avoid tunnel vision)
  - a. Give employees the skills and confidence they need
4. Keep retention in focus
  - a. Work to keep your most valuable team members



# LEADERSHIP TRAINING

Applying the JEDI Lens



# Time for a Break

*(10 minutes)*



# TRAINING PLAN: DEVELOP YOUR OWN

Standardized and Accessible



# MANAGER MEETINGS

- Coaching
- Feedback
- Style Development
- Skill Development
- Camaraderie

# INVEST IN LEARNING OPPORTUNITIES



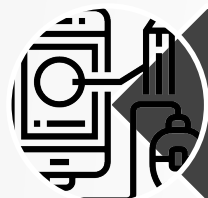
Continuing Education (CE) Dollars



Travel Dollars



Mobile Content



Online Courses

# CONNECT TO PERFORMANCE EXPECTATIONS



Part of Performance



360-Degree Feedback



Connect to Metrics

# WHAT CAN WE DO NOW?

Assess  
Current Plan

Feedback  
from  
Managers

Identify  
Immediate  
Opportunities



# MANAGER TRAINING PLANS



## Manager Training Plan Sample

Manager Name: Happy Healthy Manager, Jr.

Reviewing Supervisor: Awesome Boss, Esq.

Timeframe: July 2023 – July 2024

Competencies <i>What skills do all managers need to be successful?</i>	Resources <i>What resources do we offer to support their learning?</i>	Time <i>How do we account for the time necessary for this learning?</i>	Outputs <i>What learning activities will happen?</i>	Outcomes <i>What impact will these learning activities make?</i>
<b>Demonstrating cultural respect</b>	Leadership resource library	Protected admin time	Engage in at least one training activity	Decreased annual turnover of Patient Service Reps by 3%
<b>Giving and receiving feedback</b>	Continuing Education funding	Protected admin time	Engage in at least one training activity	
<b>Motivational interviewing</b>	Online certification program	Protected admin time	Engage in at least one training activity	
<b>Reviewing turnover data</b>	Quarterly lunch and learn State PCA webinar	Professional Development PTO	Develop annual projection and trends for team	Increased forecasting for the staffing plan
<b>Communicating our strategic goals</b>	All Staff Meeting Strategic Plan Website	Monthly manager meetings	Participate in at least 8 manager meetings	Increased employee satisfaction with admin communication on annual survey
<b>Staff's Choice! Fill out this line with one of your personal goals</b>				

## REFLECT WITH THE GROUP!

- What comes up as you begin to fill out this document?
  - What are the areas you're most excited to grow in yourself or grow your supervisees?
- If you filled this out with a supervisee in mind, how in-line do you think your expectations and theirs will be?





# RESOURCES



- [Recruitment & Retention Self-Assessment Tool](#) *(Newly updated!)*
- [Health Center Comprehensive Workforce Plan Template](#) *(formerly Health Center Provider Recruitment & Retention Plan)* *(Newly updated!)*
- [Pay Equity Checklist](#)
- [Pay Equity White Paper](#)
- [Financial Assessment For Provider Turnover Tool](#) *(Newly Updated!)*
- [Building an Inclusive Organization Toolkit](#)
- [Onboarding Checklist](#) *(A Brand-New Tool!)*
- [HP-ET Financial Impact Assessment Tool](#) *(A Brand-New Tool!)*
- [Supporting Mental Health Through Compensation Equity Factsheet](#)

**You can find all of the STAR<sup>2</sup> Center's free resources here**

**Sign up for our newsletter here for new resources, trainings, and updates**

# QUESTIONS



**STAY IN TOUCH!**

**Chcworkforce.org**

**info@chcworkforce.org**

**844-ACU-HIRE**





# THANK YOU

TO LEARN MORE ABOUT ACU AND OUR PROGRAMS,  
PLEASE VISIT OUR WEBSITE & JOIN TODAY!

[www.clinicians.org](http://www.clinicians.org)