

CONTRIBUTION, LLC

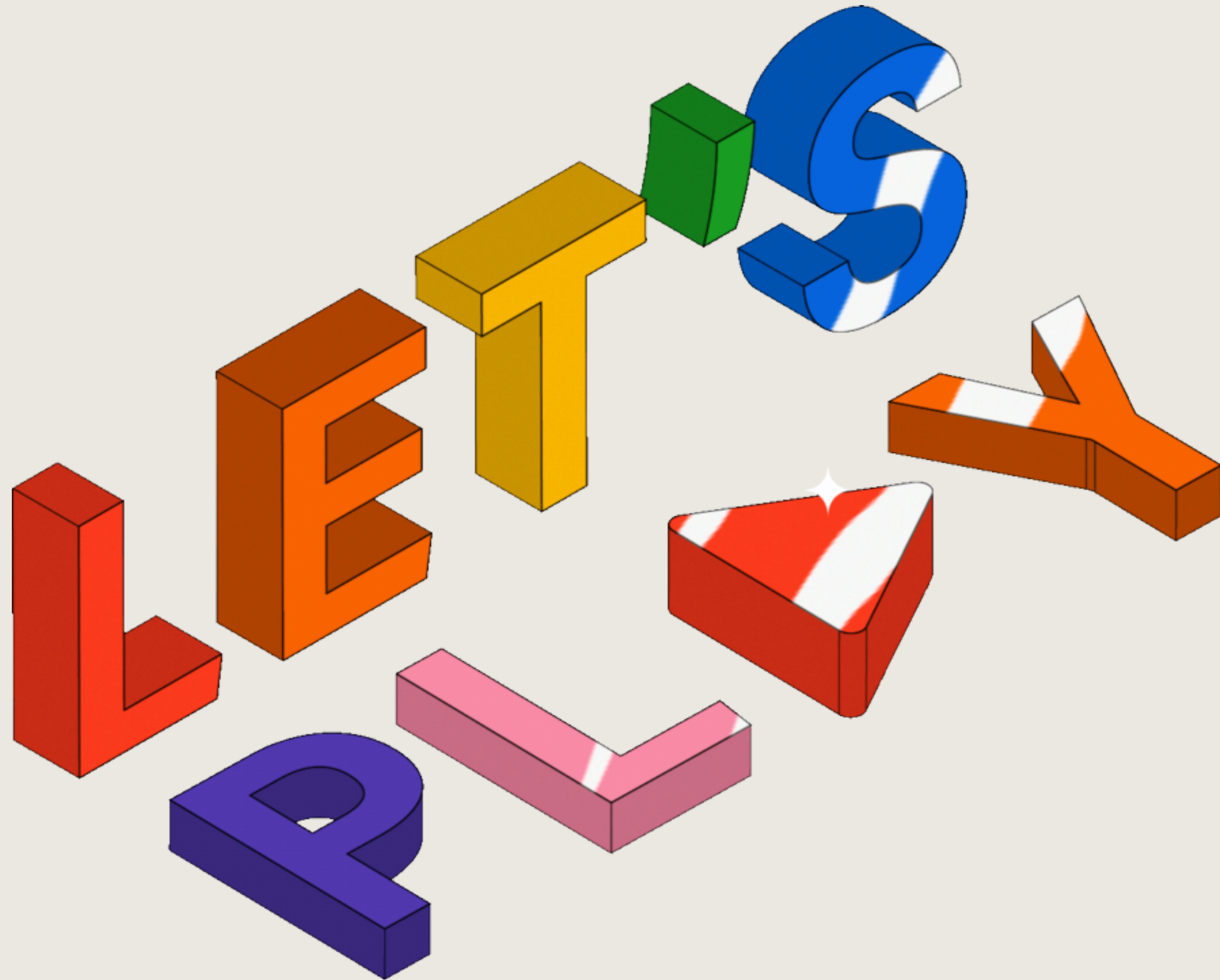
INNOVATIVE ONBOARDING & RETENTION STRATEGIES

Onboarding for Retention in Uncertain Times

9/8/2022

MT Center to Advance Health Through Nursing





“

- **How did your feelings change between the two activities?**

WHO IS THIS?

WHY AM I HERE?

AGENDA



Retention Overview



Onboarding Packet



Team Expectations

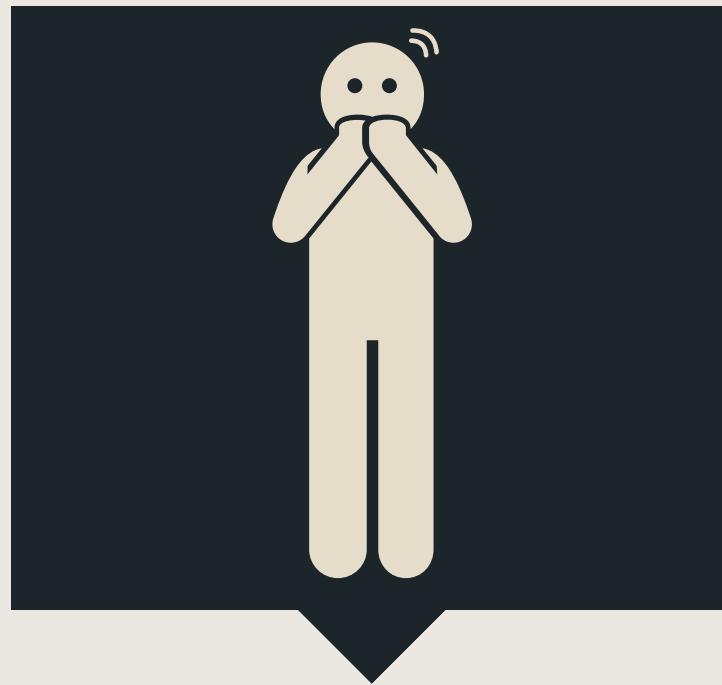


Staff
Responsibilities



Data for Decisions

THREE RETENTION CATEGORIES



New Employees

Avg: 90 days

Range: 1-365 days



Mid-term Staff

Avg: 3-5 yrs

Range: 2-7 yrs

+/- Vesting



Long-term Staff

Avg: 10+

Range: 7-25

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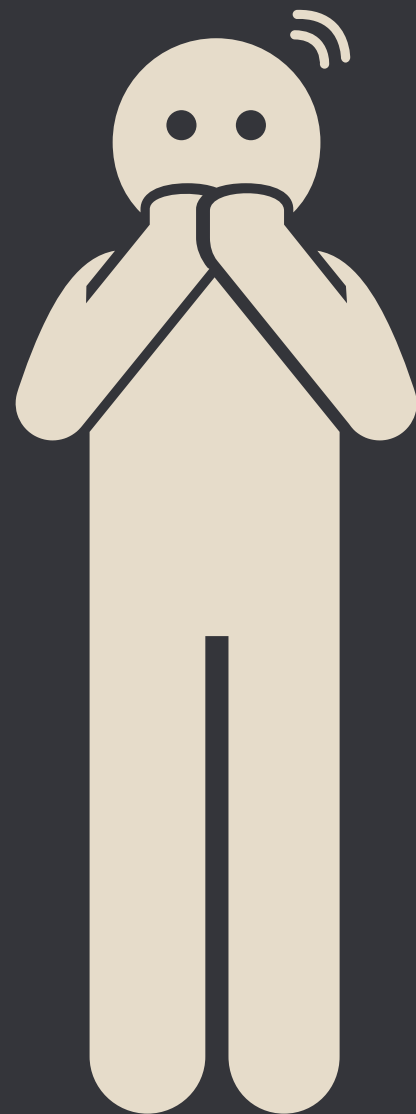


Long-term Staff

Avg: 10+

Range: 7-25

NEW EMPLOYEE



- 1 What do I need to know/do?
- 2 What is expected of me?
- 3 Do I fit in here?

- 1 Onboarding
- 2 Support - Formal/Informal
- 3 Structure

ORIENTATION



ONBOARDING



Onboarding Packet



Team Expectations



Staff Responsibilities

Onboarding Packet Template

Department Name:

NEW EMPLOYEE NAME

DATE

Team Expectations

Not everyone is ready to make a grand entrance into a team of strangers, and no necessarily needs a grand entrance. By ensuring that everyone knows their role a dynamic, newcomers transition in smoothly and established coworkers know how new members. This worksheet gives a brief overview of worries common to new members, followed by guiding questions for supervisors when creating a team ex document, and finally, a team expectations document example for reference.

Common New Staff Fears:

- Do I fit in here?
- Do I fit into the culture here?
- Do I know what is expected of me in the team?

Process and Guiding Questions for Supervisors:

How can staff members know the major expectations set for the team?

1. Write down all team expectations.
 - a. What are "musts" in your team?
 - b. What is the work culture?
 - c. What are the team dynamics?
 - d. What systematic processes are specific to the team?
2. Categorize them into a list that is no more than 1 page long.
3. Review each expectation during the onboarding process and use this time foundation for the team.

Team Expectations - Example

1. At a *minimum*, you must complete all program/project/grant requirements.
 - o We strive to be seen as state-wide, if not national top performers in program/project/grants. Our work is often used as a success metric for health facilities.
2. Bring new ideas, and be honest with your critique and feedback so we can grow together.
3. Teamwork

Primary Responsibilities

Ambiguity can quickly breed anxiety. It is important to dispel confusion and introduce new employees to the requirements of their role ASAP. This worksheet gives a brief overview of worries common to new team members, followed by guiding questions for supervisors when creating a primary responsibilities document, and finally, a primary responsibilities document example for reference.

Common New Staff Fears:

1. What is expected of me?
2. What am I supposed to do? What am I supposed to do now?
3. Am I meeting my supervisor's expectations?

Process and Guiding Questions for Supervisors:

How can the staff member see, and reference, a list of all of their major responsibilities that is both concise and prioritized?

If I was gone for the next two weeks, would this staff member know what they should be working on?

1. List all of the tasks that the staff member is responsible for - big and small.
2. Categorize them into logical groups or use billing/grant codes.
 - a. Group titles should be between 1-5 words.
3. Prioritize each responsibility.
 - a. This helps new employees self-triage their time and stay focused on the most critical tasks.
4. Discuss the responsibilities with each staff member during orientation.
5. This should be updated and discussed with the staff member any time job duties change.

Primary Responsibilities - Example

Priority Area 1: High priority

Priority Area 2: Medium priority

Priority Area 3: Low priority

PROJECT NAME 1
TIME CODE(S): 1234

ONBOARDING PACKET



- 1 List
- 2 Prioritize
- 3 Organize
- 4 Encourage
- 5 Follow-up
- 6 Update

Onboarding Packet Template

Department Name:

NEW EMPLOYEE NAME

DATE

Common New Staff Fears

- What's expected of me?
- Do I fit in here?
- Do I fit into the team?
- Do I know how to do my job?
- Do I know the priorities of my boss/organization?
- Do I know where things are?
- Who do I connect with for what I need?

1

List

01

Foundational
Knowledge

02

Relationships

03

Processes

04

Skills

Take 3 minutes and write 2 ideas for each category

2 Prioritize

1

High

2

Medium

3

Low

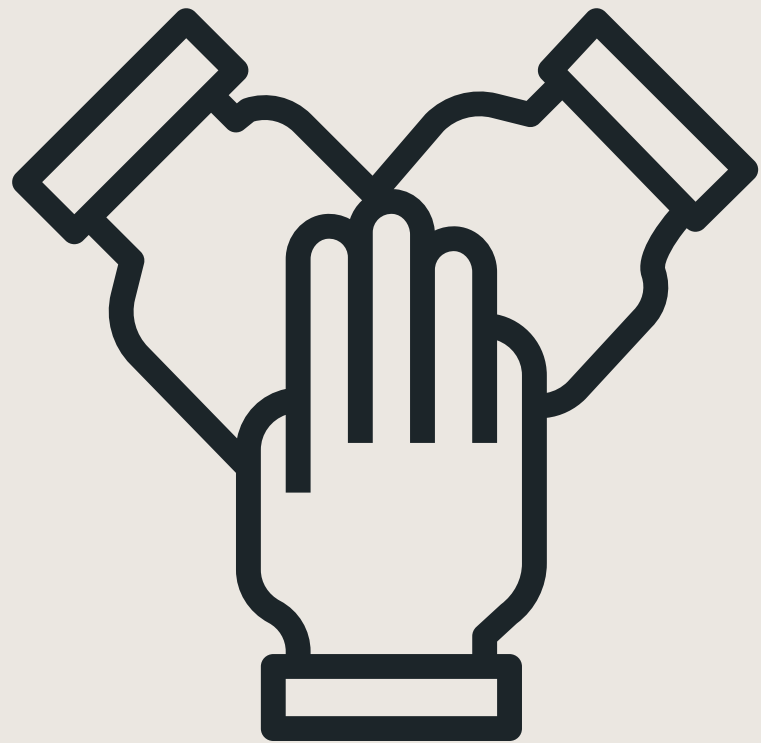
Take 2 minutes to prioritize your list

ONBOARDING PACKET



- 1 List
- 2 Prioritize
- 3 Organize
- 4 Encourage
- 5 Follow-up
- 6 Update

TEAM EXPECTATIONS



1

List

2

Categorize

3

Cover

Team Expectations

Not everyone is ready to make a grand entrance into a team of strangers, and not every team necessarily needs a grand entrance. By ensuring that everyone knows their role and the team's dynamic, newcomers transition in smoothly and established coworkers know how to relate to new members. This worksheet gives a brief overview of worries common to new team members, followed by guiding questions for supervisors when creating a team expectations document, and finally, a team expectations document example for reference.

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Common New Staff Fears

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- Do I fit into the culture here?
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1

List

01

Team 'Musts'

02

Culture

03

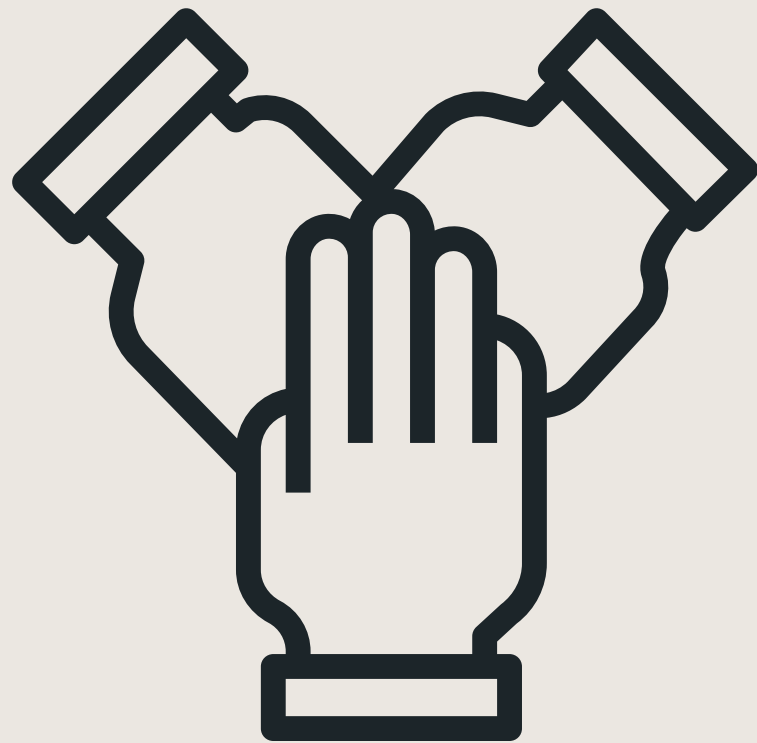
Team
Dynamics

04

Processes

Take 3 minutes and write 2 ideas for each category

TEAM EXPECTATIONS



1

List

2

Categorize

3

Cover

STAFF PRIMARY RESPONSIBILITIES



- 1 List
- 2 Categorize
- 3 Prioritize
- 4 Discuss
- 5 Update

Common New Staff Fears

- What is expected of me?
- What am I supposed to do? What am I supposed to do *now*?
- Am I meeting my supervisor's expectations?

Primary Responsibilities

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Primary Responsibilities - Example

Priority Area 1: High priority

Priority Area 2: Medium priority

Priority Area 3: Low priority

PROJECT NAME 1
TIME CODE(S): 1234

1 List

01

List tasks and
responsibilities

2 Categorize

02

Group by
theme

3 Prioritize

03

Prioritize
within each
group

Take 4 minutes to complete all 3 steps

STAFF PRIMARY RESPONSIBILITIES



- 1 List
- 2 Categorize
- 3 Prioritize
- 4 Discuss
- 5 Update

SIMPLE DATA USE WHAT YOU COLLECT



1 #: Days on the job & Department

2 Words: Exit interview

● What do I need to know/do?

● What is expected of me?

● Do I fit in here?

KEY TAKEAWAYS FOR RETENTION



Adapt Retention
Strategies to
Employee Stages



Build
Tools/Systems for
Each Stage



Employee Centered



Track and Use Data

AGENDA



Retention Overview



Onboarding Packet



Team Expectations



Staff
Responsibilities



Data for Decisions

CONTRIBUTION, LLC

energizing teams who change lives

NICK SWOPE MS, MCHES, RPCV

Contribution, LLC, Team Lead

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