

Checklist of activities

Note: Use this checklist to keep track of your retention activities and to ensure you are doing all you can to recruit and retain providers.

Part I. Promote retention through good recruitment.

- Actively promote your site on a consistent, ongoing basis.
 - » Highlight positive factors about your clinic:
 - ★ Broad scope of practice;
 - ★ Financial incentives (rural provider tax credit, NHSC loan repayment program);
 - ★ More autonomy;
 - ★ Continuity of care;
 - ★ Small close-knit community.
- Ensure the provider is the right fit for you clinic and community.
 - » Ask candidates the following:
 - ★ Have they lived or worked in a community similar to yours? If so, did they leave because they were dissatisfied with this type of community?
 - ★ If they're currently working, are they planning on transitioning to a new position because they are unhappy with community or clinic factors? What are those factors?
 - ★ What things do they value? Some values may include:
 - ◆ A small community to raise their children;
 - ◆ Excellent school system;
 - ◆ Outdoor recreation opportunities;
 - ◆ Access to shopping and other services;
 - ◆ Proximity to a large metropolitan area;
 - ◆ Employment opportunities for their spouse;
 - ◆ Religious preferences and places of worship;
 - ◆ Cultural events;
 - ◆ Diverse community.

- ★ Describe your patient population and difficulties that may be associated with serving this population. Does the provider want to serve a patient population like yours? From the very beginning, be honest and open about your practice's environment and your patients' characteristics.
- ★ Communicate your clinic's expectations. Some expectations may include requiring providers to use electronic health records, expecting a certain amount of call time and no option of working a flexible schedule. You should communicate these and any other requirements specific to your clinic to providers before they accept a position with your clinic.
- Implement a thorough orientation process.
 - » Activities should include:
 - ★ Welcome and orient the new provider and spouse/partner/family to the clinic and community.
 - ★ Arrange opportunities for the provider and family to give a clinic administrator feedback and ask questions.
 - ★ Partner a new provider with a mentor (fellow employee) during the first year of employment.
 - ★ Address concerns or issues as soon as possible that may cause the provider or family to leave the clinic or community.
 - ★ Recognize the provider for accomplishments.
 - ★ As much as possible, support the provider's compensation, education and benefit needs.

Part II. Understand the factors that affect retention.

- The top five factors include:
 - » Provider dissatisfaction with the clinical practice environment;
 - » Spouse/partner dissatisfaction with the community;
 - » Dissatisfaction with other community factors for the provider and family;
 - » Insufficient income potential;
 - » Provider problems with patient relations or patient mix.

Part III. Follow these steps to retain your providers.

1. Have a thorough orientation and on-boarding process.
2. Schedule and implement formal check-ins with all providers.
3. Engage and recognize all clinicians.
4. Develop and implement a formal retention plan. The plan should include:
 - » Goals for retention activities;
 - » Timeline of activities and provider check-ins;
 - » Assignment of activities to responsible employee;
 - » Identification of a committee to oversee retention activities;
 - » Resources available (budget, materials, staff that will carry out activities, community contacts);
 - » The elements of retention you feel benefit your clinic the most (e.g., keeping every provider for a minimum of three years);
 - » Evaluation of retention plan and activities (outcome measures).

This document can be provided upon request in an alternate format for individuals with disabilities or in a language other than English for people with limited English skills. To request this publication in another format or language, contact the Oregon Primary Care Office at (503) 373-1779 or PCO.Oregon@state.or.us or 711 for TTY.