

36TH ANNUAL **AHA RURAL HEALTH CARE** | LEADERSHIP CONFERENCE
 FEBRUARY 19-22, 2023 | SAN ANTONIO, TX
 JW MARRIOTT SAN ANTONIO HILL COUNTRY




36TH ANNUAL **AHA RURAL HEALTH CARE** | LEADERSHIP CONFERENCE

Welcome to

Secrets of the Staffing Fix & Executive Retention

Stop the Bleeding, Find and Retain Quality Staff

Please note that the views expressed by the conference speakers do not necessarily reflect the views of the American Hospital Association.



Erin Muck
 Chief Executive Officer
 Crawford County Memorial Hospital,
 Denison, Iowa



Jamie Hebets
 Senior Vice President
 The Hebets Company, an NFP
 Company




Brian Lee,
 CSP, HoF
 Chief Executive Officer
 Custom Learning System &
 Healthcare's Engagement Expert

Meet Brian Lee, CSP, HoF, CEO




- Expert on patient experience and employee engagement for 38 years
- A CSP, Certified Speaking Professional & member of the Canadian Speaking Hall of Fame
- Author of 8 books including Keep Your Nurses & Healthcare Professionals for life
- Spoken 3840+ times and traveled 5,000,000+ miles
- Personally consulted onsite with 320+ Rural Hospitals
- Founder and CEO of Custom Learning Systems and the HealthCare Service Excellence Conference


**“There’s plenty of help.
 They just *don’t* work for you.”**

– Clint Maun CSP
 Maun Lemke, Inc.

Maun-Lemke
 Changing the Results of Healthcare




Meet Jamie Hebets



Senior Vice President

- Senior Vice President, The Hebets Co.
- Board Member of the Finseca Foundation.
- Board Member for Future for Kids
- A registered representative with Kestra Investment Services, LLC
- Joined NFP in 2012
- Have helped over 90 healthcare organizations

The Hebets Company
 attractandretain.com



Meet Erin Muck, RN, MBA, CEO




- In Healthcare for 31 years
- Registered Nurse
- MBA
- CNO 6 years
- CEO for the last 3.5 years
- Spent entire hospital career in rural Critical Access Hospitals

CRAWFORD COUNTY MEMORIAL HOSPITAL



The Big Challenge

We need kind compassionate caregivers to **show up for work.**




- **"Our agency spend is down \$23,000 a week and we did it in 16 weeks"**
- We now have a **waiting list!**

"13 of our 16 new hire referrals came from mentors"


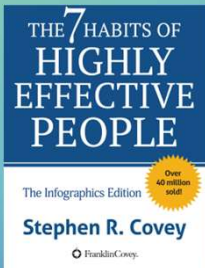
"Our employee morale has skyrocketed from 17% (10 out of 10) to 43%!"

- 8% Turnover!





The Point

We don't need to be victims about staffing


*"Don't let the things you **can't control** interfere with things you **can.**"*

— Stephen Covey










But first a few questions...




How many of you...

- Are experiencing pain from staffing?
- Do have a major initiative to fix the problem?
- Do have vacancies?
- Are using agency?
- Are using significant overtime?
- Do struggle with Physician Recruitment & Retention?
- Just wish this problem would go away?

Today's Mission...



Stop the **Bleeding**, **Find** and **Retain Quality Staff**






Agenda

What You Will Learn How To:

- ★ 6 Paradigm Shifts
- ★ 10 Key Front Line Best Practices
- ★ 3 Physician & Executive Comp Best Practices
- ★ 3 Take Home Tools







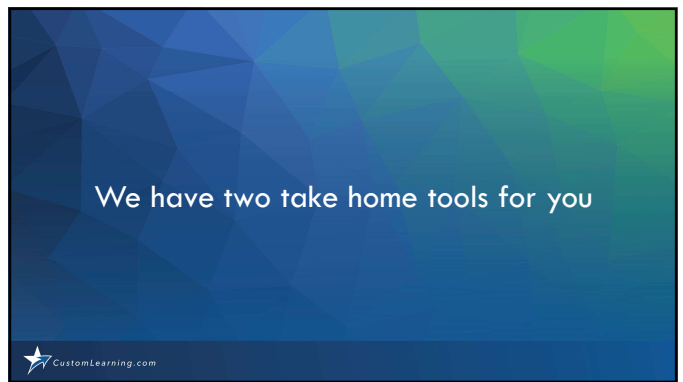
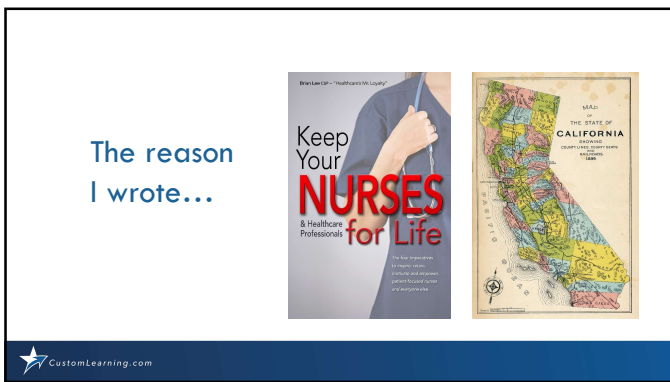
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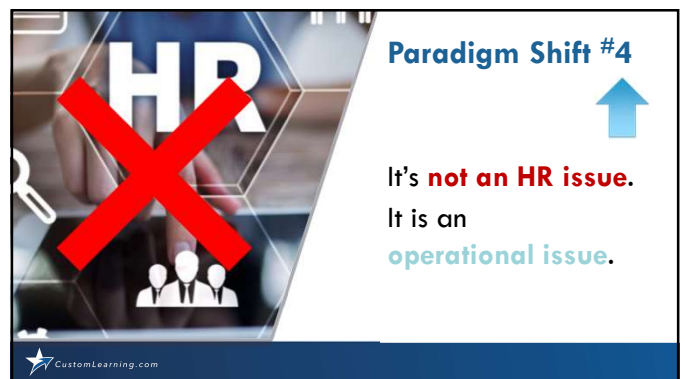
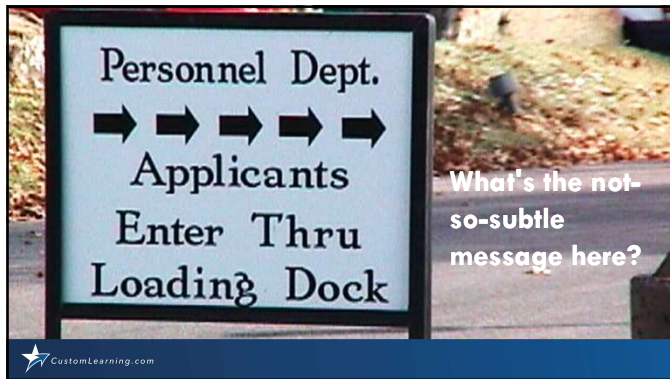




“Feedback is the breakfast of champions”
– Ken Blanchard

- Scan QR Code
- Click the link







Paradigm Shift #5

Physicians and Executive 

Compensation


Recruits

Transformational


Retirement Benefits

Retains






Paradigm Shift #6


Frontline 


Engagement

Is no longer an **option**...

It's the **answer!**




What's My Point? 




*"If you have **not suffered** enough, it is your God-given right to **suffer more.**"*


– William Aberhart
Alberta Premier



Recommendation 



Charter a team to hardwire these best practice recommendations over a **16 week timeframe**





Recommendation 

Recruit as if...

Recruit for **every position** like you were **recruiting for a physician!**











CASE STUDY


From 17 vacancies to a waiting list in 16 weeks!

CRAWFORD COUNTY MEMORIAL HOSPITAL

Dennison, Iowa

- 25 bed critical access hospital in rural midwestern Iowa
- Multiples services including inpatient, obstetrics, surgery, rural health clinic, specialty clinic, emergency room, laboratory, radiology, rehab services and ambulance
- 260 employees
- Service area of almost 20,000 people in a very diverse community
- Annual community economic impact of \$30 million



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Paradigm Shift 

Recruit Your Own Recruits





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Recommendation 

Replace sign on bonuses that incentivizes **job hopping** with:

- Referral bonuses
- Retention bonuses
- Student loan repayment
- Tuition reimbursement



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Employee Referrals 




Alex (mentor) and Jerry (first mentor)




Jessica (mentor) Erin





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Critical Point ... 


If you don't **A.S.K.**
You won't **G.E.T.**



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A.S.K. 

- **A.S.K.** your new hires & employees for their referrals
- **All employees are eligible & invested** & paid bonus when an applicant passes their **90 day graduation**
- Implement a time dated **larger referral bonus** for **“at risk”** positions that you need filled NOW
- Payout bonus at **30, 60 and 180 days**

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To minimize "Ghosting" of Interviews

- Team members **phone applicants**
- Give applicant option of a **different interview location**
- Or **virtually**
- Including **after hours** or **weekends**



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Question

- Have you ever made a **hiring mistake**?
- How much support did your staff give that **new team member**?

Recommendation

Implement **team-based interviewing** NOW (using behavioral interviewing)


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Team Based "2 Up 2 Over" Interviews



WELCOME TO THE TEAM!

Cindy Negron
Patient Access Representative







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Paradigm Shift

Hug Your New Hires for a Year





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Recommendation



Not a memorable, engaging and **SNOOZEFEST** regarding New Hire presentation



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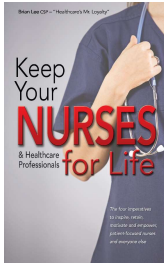
The Point...

You never get a **second chance**, to make a positive **first impression!**




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Take Home Tool – Digital copy

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New Hire Mentors (Buddy/Preceptor)




Mentor Sarah – new Nicole mentor



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*“If you have a **problem**, make it a **procedure**, and it won’t be a **problem anymore.**”*

– Wayne Cotton

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Recommendation

Check in with new hires before they check out!

NEW HIRE CHECK-IN:



- 1st DAY
- 1st WEEK
- 2nd WEEK
- 1st MONTH
- 6th MONTH

Idea! Host a 90-day CEO breakfast




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90 Day Nachos Party

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Paradigm Shift





Its not an HR Issue
it’s an operational issue

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“50% of workforce satisfaction comes from employees relating with their b.o.s.s.”

– Beverly Kaye Ph.D.
CEO, Author, Speaker

7 Leadership Interactions







New Hire Testimonials





JERRY AHLBERG
EMT, EMERGENCY DEPARTMENT

What Do Our Employees Say ABOUT US?

I feel privileged to work at CCMH because I'm serving and providing for the community in which I live. CCMH also allows me the opportunity to advance and grow my career while doing what I love!



JOIN OUR TEAM
www.ccmh.com/careeropportunities/







New Hire Testimonials





ERIN STALEY
RN, MEDICAL CLINIC

What Do Our Employees Say ABOUT US?

CCMH was able to offer me everything I was looking for in a career. Great benefits, competitive wage, a friendly and family-oriented environment, ample opportunities to better myself through education and experiences, as well as the opportunity to work at a pace I am very comfortable with.



JOIN OUR TEAM
www.ccmh.com/careeropportunities/

Attracting and Retaining Top Talent with Executive Retirement Benefits



Jamie Hebets
Senior Vice President
The Hebets Company







Paradigm Shift


↑

**Compensation Recruits,
Transformational Retirement Benefits Retains**









Executive Compensation Benefits 101



A **sad story** with a **happy ending** (The Colleen Curtis Story)


The Point




It is **never too early**, it's never too late.


Eligibility Group



- They must meet one of the following 3 criteria...
 - Managerial**
 - Or
 - Supervisory**
 - Or
 - Highly Compensated (generally \$130,000 income or more)**





THE RETIREMENT INCOME GAP





Salary at Age 45	Target Replacement Ratio	Projected Retirement Income	Shortfall
\$50,000	41%	55%	14%
\$100,000	29%	38%	9%
\$150,000	21%	31%	10%
\$200,000	16%	25%	9%
\$250,000	12%	21%	9%


= Retention Gap

How much saving is really required to retire?

- A person must save **20% of pay for 20 years**
 - While earning approximately **7.6% average ROR**
 - to retire on **50% of their pay for 20 years**



50th Percentile for Employer Contributions for C-Suite / High Income Earners

- ✓ **Two Classic Calculation Approaches...**
- 💰 **Defined Contribution: 20% of Pay Contribution Contribution**
(reduced by match/contributions to other plans)
- 🏠 **Target or Defined Benefit: 50% of Pay Retirement Income Stream**
(2.5% of pay, per year of service, capped at 20 years)

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Recommendation

1. Become retirement benefits/incentives **literate**
2. Don't wait for the **resignation letter** to get motivated
3. Get up to date on your **competitor's** recruitment and retention strategy

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Physician & Executive Compensation Paradigm Shift #1 ↑

What if you could offer a tax free retirement benefit with no contribution limits?

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How many of you?

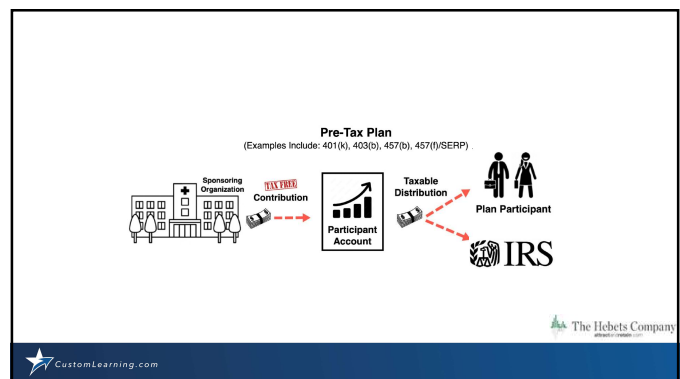
- Use a fairness opinion, or compensation benchmarking firm?
- Currently have a 457(f)/SERP?
- Think I'm describing the new Tesla Cybertruck?
- Have participated in a plan called "Loan regime Split Dollar"?

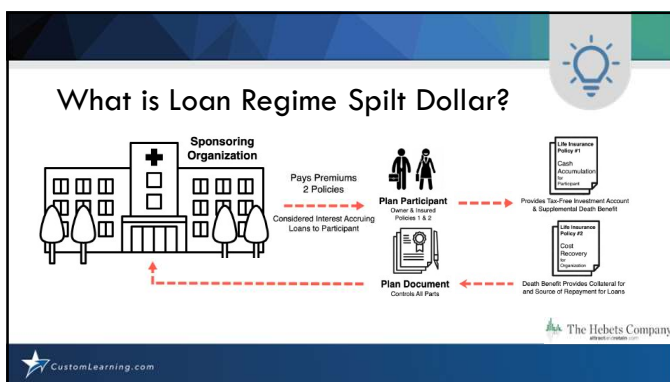
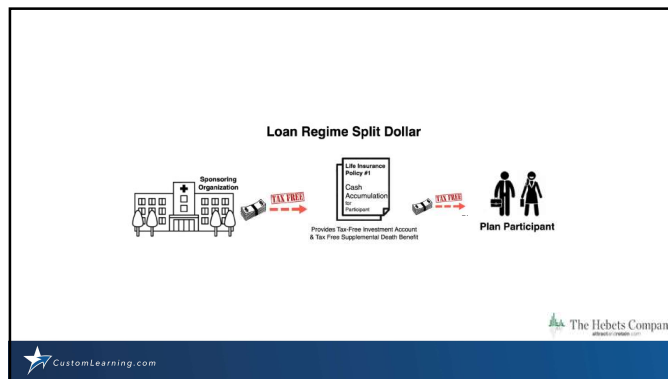
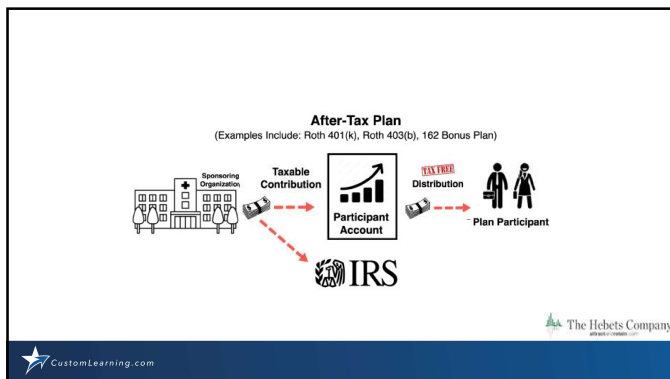
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Question

How would you feel about paying IRS **\$1,000,000 in taxes**, only to discover you **didn't need to?**

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The Challenges a Non-Profit Faces With Compensation and Retirement

- Public Perception & Optics (Form 990; Schedule J Reporting of Income)
- Supplemental Retirement - 457(f)/SERP (Tax Inefficiencies to Plan Participants)
- Significant Expenses to Employer (Cash Compensation & Retirement)
- Excise Tax (21% Tax payable by non-profit on executive compensation over \$1 million)

Email jamie@hebetsco.com to receive copy of our "Key Stakeholder's Definitive Guide to All Supplemental Retirement Plan Options"

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Recommendation

- Put a hold on **firing your CPA!**
- Create a **sense of urgency** to proactively help your physicians and leaders avoid unnecessary taxation

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Physician & Executive Compensation Paradigm Shift #2 ↑

What if you could make retirement benefits so compelling leaders would never want to leave?

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Question

What if your CEO asked you to lock in retaining your leaders & primary care Physicians, what would you do?



The Point

It is **never too early**, it's never too late.

Before and After For Participant Age 67 Year Old

Existing SERP/457 Plan		Loan Regime Split Dollar	
Current 457(f) Balance	1,247,638	457(f) Balance Moved Over 7 years	1,247,638
Current Exec Death Benefit (Taxable)	1,247,638	Current Exec Death Benefit (Tax-Free)	3,265,540
Projected Lump Sum Benefit	2,589,026	20 Year Annual Tax-Free Income Stream	163,277
Income Tax to Executive (43%)	1,113,281	Total 20 Year Tax-Free Retirement Benefit	3,265,540
Net After-Tax Lump Sum			2,417,387
Amount Subject to Excise (amount over \$1 million)	1,475,745		0
Excise Tax to Organization		Annual Expense to Organization	0
Annual Expense to Organization	307,683	Liability Becomes Interest Accruing Asset	1,247,638
Liability	1,247,638		






Cost Recovery to Organization 67 Year Old

Bank Age	Proposed Split Dollar Plan		Excess Death Benefit to Organization	Total Returned to Organization	IRR to Organization (Assum 1)	IRR to Organization (Assum 2)
	Total Cost Recovery to Organization	Cost Recovery to Organization				
75	4,317,964	7,737,409	4,417,414	13,175,083	22.9%	24.29%
80	4,317,964	8,958,487	4,742,417	13,752,343	22.8%	22.7%
85	4,317,964	10,196,511	5,069,454	14,098,564	8.2%	8.4%
90	4,317,964	12,064,724	2,164,993	14,223,427	6.1%	6.1%



Note: *Assum 1* includes the savings associated with avoiding the excise tax from the IRR calculation.
 Assum 2 includes the savings associated with avoiding the excise tax in the IRR calculation.

1. The additional premium is paid by the employer as a loan
2. The loan is secured by the policy death benefit
3. The employer gets paid by with interest @ 6%
4. This a creative win-win using tax free loans

Recommendation

1. If you haven't explored this innovative **tax-free benefit loan approach** with your executive compensation consultant, **do it tomorrow**
2. If you've got an eminent retirement of a key leader, **do it yesterday**



Take Home Tool


COMPLIMENTARY:
 CEO COMPENSATION & TOTAL REWARDS SNAPSHOT REPORT

CEO Total Rewards Complimentary Review
 Health Center
 September 2022


TAKE A PHOTO


Scan the QR Code to learn more about our CEO Compensation & Total Rewards Snapshot Report

Physician & Executive Compensation Paradigm Shift #3 


What if leaders could convert their current taxable retirement benefits and plans to tax free


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 Question

If you were asked to recommend a creative Tax free incentive to **retain Physicians**, what would you do?

Here's a very **cool idea**.


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It's not how much you make; it's how much you get to keep... *Plan Participant's Perspective*

45 Year Old Plan Participant - Investing After-Tax Dollars 1% Participation in ERSD Retention Program Benefits


Option 1				Option 2			
Invest 10% of Gross Pay into After-Tax Dollars				Retire into 99% of Current Compensation & Receive ERSD Retention Program Benefits			
Current Compensation	500,000			450,000			New Compensation (remains eligible for future increases)
10% of Pay	50,000			50,000			Employee Contributions (gross level)
Income Tax on 10% of Pay @ 43%	21,500			12,500			Employee Match @ 25%
Invest After-Tax Pay into Inheritance Account	28,500			62,500			Annual ERSD Contribution Funded Beginning of Each Year
Wounded War Rate	30%			0%			Tax on Growth
Rate of Return	4% Gross + 1% After Tax			5.74% Gross			Rate of Return
Initial Death Benefit	0			1,625,000			Initial Death Benefit
Account Balance		Cash Surrender Value		Death Benefit			
Year	Age	Year	Age	Year	Age	Year	Age
Ability to Access Register				100% Withdraw From Day 1		Ability to Access Register Day 1 of Year 3	
1	46	1	46	65,516		1,471,916	
3	48	3	48	154,616		1,578,696	
5	50	5	50	273,183		1,698,183	
7	52	7	52	417,954		1,834,254	
10	55	10	55	669,840		2,094,640	
Normal Retirement Age	20	65	90	2,087,544		3,452,544	
After 10 Years of Distributions	30	75	90	1,333,542		1,453,873	
After 20 Years of Distributions	40	85	90	74,889		202,878	
	50	95	95	5,178		38,300	
				0		0	
Annual Income Distribution 60-64	64,921			184,535		20 Year Annual Tax-Free Income Distribution (Age 60-85)	
Total Distributions Over 20 Years	1,297,884			1,200,769		Total Distributions Over 20 Years	
				99,642		Assured Income in Distribution Amount	
				1,992,836		Total Income in Distributions Over 20 Years	


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 Recommendation

The 5 most national cutting trends in executive compensation to focus on:


1. C Suite **retirement/succession** planning
2. **Physician** retention planning
3. Delivering **stay bonus tax free**
4. Compensation **restructuring**
5. Identify a **champion** of the journey now


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Paradigm Shift 


Frontline Engagement Is no longer an option... It's the answer!

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"The only thing worse than training your employees and losing them is not training them and keeping them."

— Zig Ziglar

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Meet this year's Service Excellence Advisors





Recommendation

Engage your brightest and best to **teach a patient experience workshop to newcomers**





Create a Universal Sense of Belonging via License to Please Empowerment Bundle







7 Empowering Best Practices

1. Service **Recovery**
2. The **Six-Foot Rule**
3. **No Pass Zone**
4. The Platinum **“Live It” Rule**
5. **Managing Up**
6. License to **Silence**
7. Freedom to **Clean**






Originally presented in the **Everyone's a Caregiver** App



“License to Please” Empowerment Bundle*

Kindness Everywhere Skills	Memory Hook
1. Service Recovery	Mess Up? Fess Up and Dress Up
2. The Six-Foot Rule	Look Up
3. No Pass Zone	Don't Pass Up
4. Managing Up	Manage Up
5. The Platinum Rule	Follow Up
6. License to Silence	Zip Up
7. Freedom to Clean	Clean Up
	Train Up!

*Now, everyone can

Recommendation

Question: Do you know what's **so cool** about the **empowerment bundle?**

*“These are **all simple things you can do**, while you're **doing what you do...** and they **don't cost a cent!**”*

– Brian Lee CSP, HoF




Highly Qualified Employee Advertisements




(SEA)

Kayla Hoyt
REGISTERED NURSE (RN),
MEDICAL UNIT

My favorite thing about working at CCHM is the wide range of experience I receive throughout the Medical Unit, Obstetrical Unit, and Emergency Room. This knowledge and hands on training has given me several opportunities to grow as a nurse and advance my career.

JOIN OUR TEAM
With CCHM you can advance your career.

What Do Our Employees Say ABOUT US?

Hardwire Staffing Fix™ – Board Report




Board, Physician & Advance Care Practitioners, 2019









Board Engagement



Letter – Staffing Fix Program, Review & Results

Board Report

High Need Position Identified

- Registered Nurses (RN) – ER, OB, Med Unit, and Surgery
- Clinic – Certified Medical Assistant, Licensed Practical Nurse, and Registered Nurses
- Certified Nursing Assistant – Med Unit
- EMS – EMT's and Paramedics in the ER









Board Report

First Round Primary Assignments

- Create a FUN Scoreboard
- Implement a Mentor Program
- “Bubble wrap” new employees
 - Keep them away from negative employees
- Organize a process that assures 7 different interactions
- Implement a process which includes a warm, position, coming reach out by a peer team
- Get approval for a time-dated staff referral
- Implement “2 Up & 2 Over” Interviews
- Start an instant remedy process
- Identify “Highly Qualified Employees” who stand out for being great at their job, etc.

Board Report





Round 1 Agency Spend

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
\$15	\$35	\$30	\$37	\$45	\$31	\$33	\$22	\$15	\$22	\$25	\$22
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Round 2 Agency Spend

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
\$15	\$35	\$30	\$37	\$45	\$31	\$33	\$22	\$15	\$22	\$25	\$22
100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Agency Spend

Board Report

Round 1 RN Vacancies

Week	1	2	3	4	5	6	7	8	9	10	11	12
400	431	430	407	54	515	518	575	615	480	505	400	
4	8	8	8	1	1	1	1	1	1	1	1	1

Round 2 RN Vacancies

Week	1	2	3	4	5	6	7	8	9	10	11	12
518	513	508	521	83	878	817	878	935	87	914	871	
1	1	1	1	1	1	1	1	1	1	1	1	1

Registered Nurse Vacancies

Board Report

Round 1 Clinic Vacancies

Week	1	2	3	4	5	6	7	8	9	10	11	12
24	200	200	200	200	200	200	200	200	200	200	200	200
1	1	1	1	1	1	1	1	1	1	1	1	1

Round 2 Clinic Vacancies

Week	1	2	3	4	5	6	7	8	9	10	11	12
200	200	200	200	200	200	200	200	200	200	200	200	200
1	1	1	1	1	1	1	1	1	1	1	1	1

Clinic Vacancies

Todays presentation was not designed to quench your thirst...
But to wet your appetite!

Our Challenge For You

Recommendation


The Time is

TAKE CONTROL

NOW


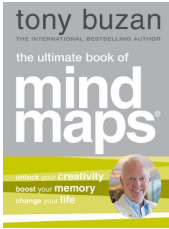
“We are **dabbling at these things**, but we have **not hardwired them.**”

– Jeremiah Dodrill CFO




“Hope, **dabbling, diddling, dithering,** and **mentioning** are **not strategies.**”

– Brian Lee CSP, HoF

“**93%** of **what you learn** in a classroom **is forgotten** within **14 days**”

Use it or lose it!



The Accountability First Step...

W **W**
W & **H**




The Accountability First Step...


WHO will do **What** by
When & **How** in **14 days?**




The Accountability First Step...



YOU will do **What** by
When & **How** in **14 days?**




Recommendations 

1. Do something **better** or **differently** now!
2. **Acknowledge** those who go **above and beyond**

GREAT JOB!







Thank You

- Sarah Reusch
- Paul Johnson
- Andrew Solo
- Shannon White


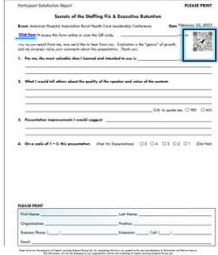






“Feedback is the breakfast of champions”

– Ken Blanchard



- Scan QR Code
- Click the link

Recommendations



4. **Begin** every meeting with **“Good News/Inspiring Story”**
5. **Close** every meeting with **“Good of the Patient”**

Please Share

- A Question
- A Take-away

