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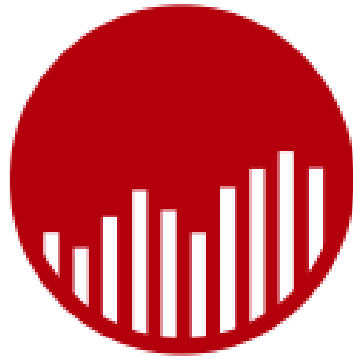


Coaching staff up for Optimal Performance Part 1- July 25, 2022

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MTM Services

- MTM Services is a team of consultants that was built from the ground up with the direct purpose of working with organizations delivering Mental Health, Intellectual/Developmental Disabilities, Substance Abuse, Residential, Community Based, Hospital, Integrated Care with PCPs, and/or Urgent Care services. MTM has worked to help over 1,000 organizations in 47 states, Washington, DC, and 2 foreign countries implement changes since our inception in 1995.

MTM Services 2022 Webinar Series

Webinar Content and Objectives

This interactive two-hour webinar will address the five core competencies in managing, coaching, and developing team members in the current healthcare workforce “*shortage.*”

The need to coach staff to optimal performance is a core competency of senior and middle management in the new talent wars.

Part 1:

- Define the state of the current workforce
- Learn proven strategies to coach, engage, incentivize, and retain great team members
- Learn the core competencies needed in middle and senior management to coach staff up in their current and future roles in order to meet the marketplace needs

Part 2

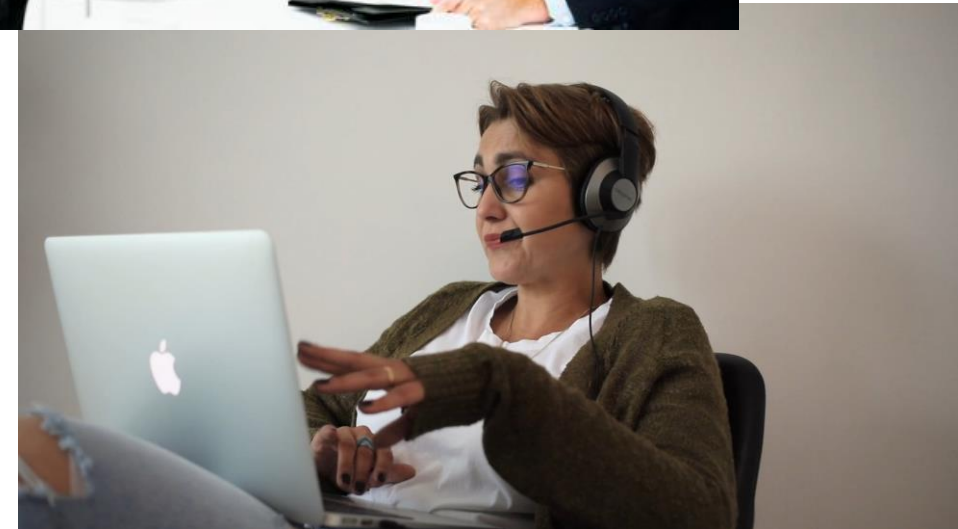
- Understand the true cost of turnover – especially at the manager and supervisor level – including organizational reputation, outcomes, and bottom line
- Review sample performance evaluations that help keep team members engaged and focused
- Learn from real life examples of how to implement innovative employee incentives and merit-based performance increases
 - Develop your coaching and retention strategy
 - Develop strategies to become an employer of choice and increase employee pride in their workplace

Management Core Competencies



Behavioral Health's Top Workforce Concerns

- Employee Retention
- Attracting Good Employees
- Health and Safety Concerns
- Inflation Concerns
- DE&I Concerns
- Labor Shortages
- Managing Hybrid vs. Telehealth Workforce
- Legal and Compliance concerns
- Competency and Skill Assessments
- Competition from Education and Allied Health, Private Practice and Human Service Fields



Workforce Shortages

SAMHSA reports the U.S. needs about **4.5 million additional behavioral health professionals¹**.

The current behavioral health professional workforce is about 700,000 individuals¹.

The estimated need for that workforce is 5.17 million, a shortage of 87%¹.

Shortages are most pronounced among behavioral health of 1.1 to 1.4 million¹

Peer Support 98% Shortage

Addiction Psychiatry 97%



Source: (2021) Trends in Behavioral Health A Reference Guide on the US Behavioral Health Financing and Delivery System Third Edition¹.
Florida Health Behavioral Health Association²

Difficulty Getting Qualified Staff

- Many providers have reported that finding qualified candidates has been difficult.
- According to the SHRM this is complicated by the fact that many HR officers ...
 - 31% reported limited Flexibility of work hours and location²
 - 41% reported uncompetitive compensation²
 -
 - 72% of reported finding qualified talent is a top concern²
 - 76% of In person vs. 61% of remote²
 -
 - Organizations with ineffective DE&I initiatives were 32% more likely to have climbing recent resignation rates than organizations with highly effective DE&I²

²Source: SHRM State of the Workplace Study 2020-2021 . SHRM.org



Changes in the Delivery of Care

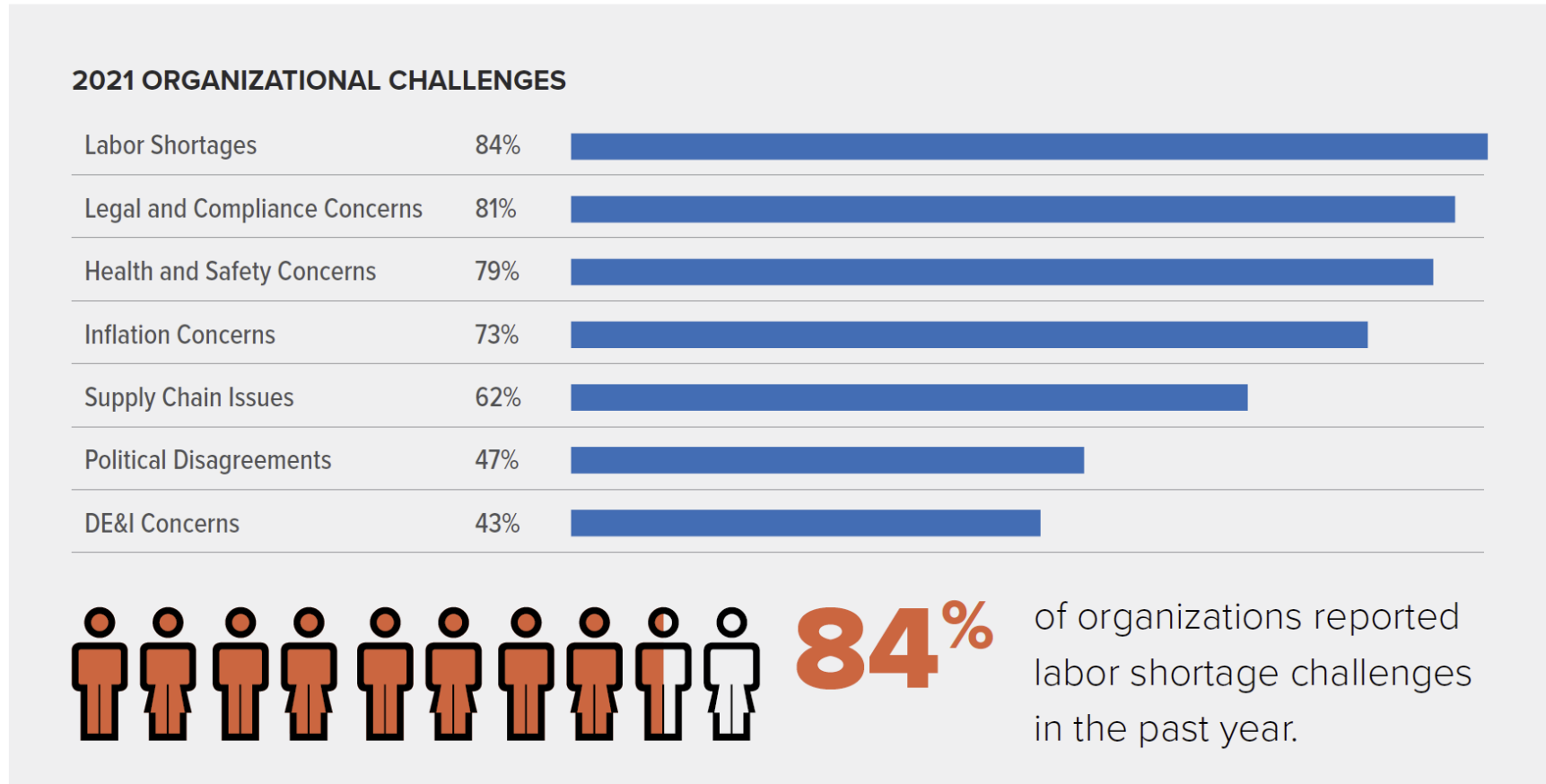


- Over the course of the pandemic, insurers have paid out anywhere from **two to ten times more per month** for telehealth services in 2020 compared to 2019³
- From November 2020 to February 2021- **33%** of all mental health appointments were conducted virtually³
- McKinsey survey found that **74%** of telehealth users during the pandemic reported high satisfaction with the care they received⁴

³Source: Thomas L, Capistrant G. (2016). 50 state telemedicine gaps analysis, coverage and reimbursement. http://c.ymcdn.com/sites/portal.americantelemed.org/resource/resmgr/Docs/2016_50state-telehealth_cove.pdf?hhSearchTerms=%22parity%22. Accessed March 15, 2018

⁴<https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/national-employer-survey-reveals-behavioral-health-in-a-covid-19-era-as-a-major-concern>

According to SHRM the top concerns are:

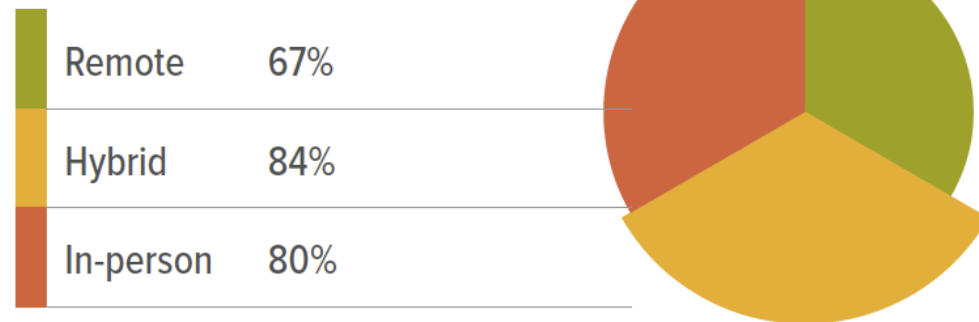


Source: SHRM State of the Workplace Study 2020-2021 . SHRM.org

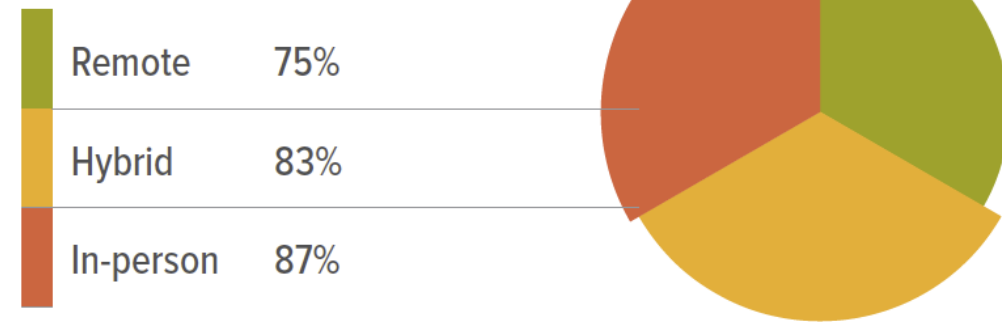
Remote vs. everything else

Remote organizations reported better responses than in person or hybrid organizations

LEGAL AND COMPLIANCE



LABOR SHORTAGES



Source: SHRM State of the Workplace Study 2020-2021 . SHRM.org

Creating a Vision for an Optimal Team Based Culture

Dramatic change is possible when executive leadership has a clear vision, the vision is clearly communicated throughout the organization, and systems are put into place to operationalize that vision.

The question is...how will your organization transform their service delivery culture and vision to align with the new workforce trends, expectations and opportunities?



Elements of a Team Based Culture



- Clearly communicated expectations
- Accountability
- Alignment
- Rewards
- Sanctions
- Trust

Staff Engagement and Wellness



What the Future Looks Like....

- Gallup anticipates **37% fewer in-office days** for employees in 2022⁵
- .
- There are 125 million full-time jobs in America, and about 50% of them can be done remotely. Of those who can work off-site, 30% want to be fully remote while 60% want to be remote some of the time⁵
- **Behavioral Health Providers will need to review current positions and reevaluate of these positions are in person, hybrid or fully remote.**

• ⁵Source: 7 Gallup Workplace Insights: What We Learned in 2021 <https://www.gallup.com/workplace/358346/gallup-workplace-insights-learned-2021.aspx>



Gallup State of the American Workplace Study



- 33% of the U.S. professional workforce is engaged in their work⁵
- The ratio of engaged to actively disengaged employees is roughly 2-to-1⁵
- Meaning that the majority of U.S. professional workers (67%) are not reaching their full potential⁵
- During the Pandemic---Remote workers were more engaged but at the same time more stressed⁵

⁵Source: State of the American workplace: Employee Engagement Insights for U.S. Business Leaders . Gallup ,Inc.



- 53% of employees say a role that allows them to have greater work-life balance and better personal well-being is “very important” to them⁵

⁵ Source: State of the American workplace: Employee Engagement Insights for U.S. Business Leaders . Gallup ,Inc.

Communication is Key

- 22% of employees strongly agree the leadership of their organization has a clear direction for the organization⁵
- 15% of employees strongly agree the leadership of their organization makes them enthusiastic about the future⁵.
- 13% of employees strongly agree the leadership of their organization communicates effectively with the rest of the organization⁵.



⁵Source: State of the American workplace: Employee Engagement Insights for U.S. Business Leaders . Gallup ,Inc.

Gallup's Most Important Findings



- Engagement makes a difference to the bottom line⁵
- Managers and Leaders Play a Critical Role⁵
- Different types of workers need different engagement strategies⁵
- Engagement has a greater impact on performance than corporate policies and perks⁵
- Employees are not prepared to engage customers⁵

⁵Source: State of the American workplace: Employee Engagement Insights for U.S. Business Leaders . Gallup ,Inc.

Engagement and Performance Outcomes



- Customer Ratings⁵
- Profitability⁵
- Productivity⁵
- Turnover⁵
- Safety Incidents⁵
- Shrinkage (theft) ⁵
- Absenteeism⁵
- Patient Safety
- Quality⁵

⁵Source: State of the American workplace: Employee Engagement Insights for U.S. Business Leaders . Gallup ,Inc.

Leadership is Key

- The relationship between the employee and their manager/supervisor is key to employee engagement and wellness⁵
 - Strengths based management
 - Enhance employees well being
 - Encouragement
 - Trust
 - Support



⁵Source: State of the American workplace: Employee Engagement Insights for U.S. Business Leaders . Gallup ,Inc.

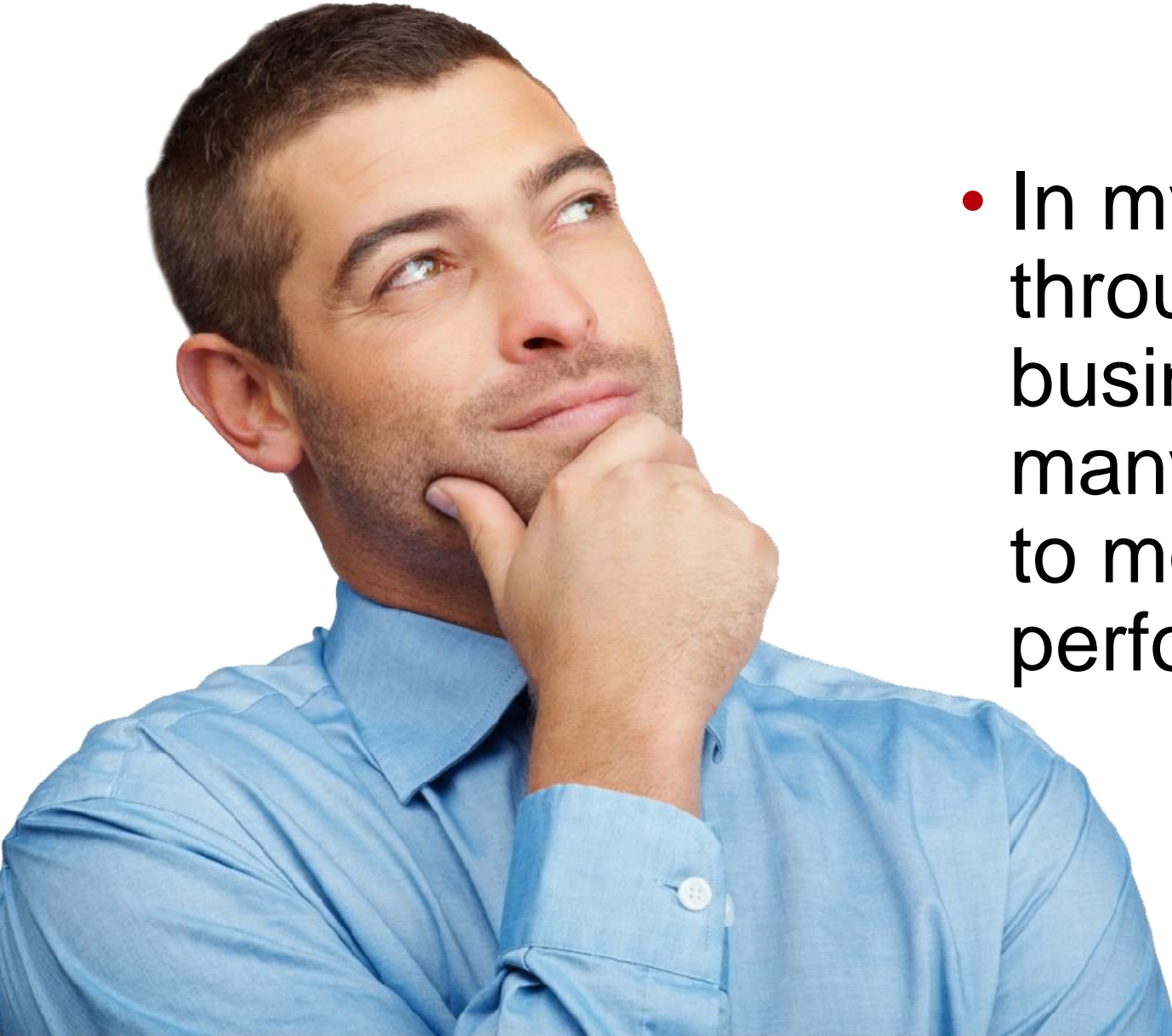
What is Employee Engagement?

- Deloitte defines employee engagement as an employee's job satisfaction, loyalty, and inclination to expend discretionary effort toward organizational goals. It predicts individual performance and drives business outcomes.⁹
 - Critical driver of business outcomes: Organizations with highly engaged employees had an average 3-year revenue growth 2.3 times greater than those whose employees showed average engagement.⁷
 - Competitive advantage: American businesses are losing productivity worth \$300B annually due to disengaged workers. Employee engagement can become a key competitive advantage or a primary weakness.⁸
 - Only four percent of leaders believe they are very effective in engaging staff

• Source: engaging different generations in the workforce.⁷ Schaufenbuel, K. (2013). Powering your bottom line through employee engagement. UNC Kenan-Flagler Business School.
⁷ Ologbo, A.C., and Sofian, S (2012). Individual factors and work outcomes of employee engagement. Procedia Social and Behavioral Science.
⁹Deloitte (2016), Engagement: Always On, 2016 Global Human Capital Trends.

Overview

- In my work with employers through consulting with businesses around the country many employers find it difficult to motivate their teams to peak performance.



They say...

- “That’s nice, but it will never work with our team”,
- “We are different”, We are “rural, frontier, urban, suburban.....”
- “We tried that it didn’t work”,
- “That’s not the way we do it here”.

Develop your Coaching and Recruitment Tool kits

- Would you work for you?
- Review a range of power-packed recruitment and retention strategies — from investing in graduate education to retooling your organization and on boarding employees.
- What are the successful employee engagement techniques and what skills do we need to prepare our staff to work with health reform's new consumers and third-party payers.



Coaching Staff UP

Coaching for Peak Performance



Coaching your Staff for Optimal Performance

- Coaching up or Coaching Out
- Focus on Wellbeing
- Focus on Clear and Effective Communication
- Goal Setting
- Strength based models- Strengths Based Supervision
- Supervision Models
- Coaching Plans
- Responsibility and Authority of Managers

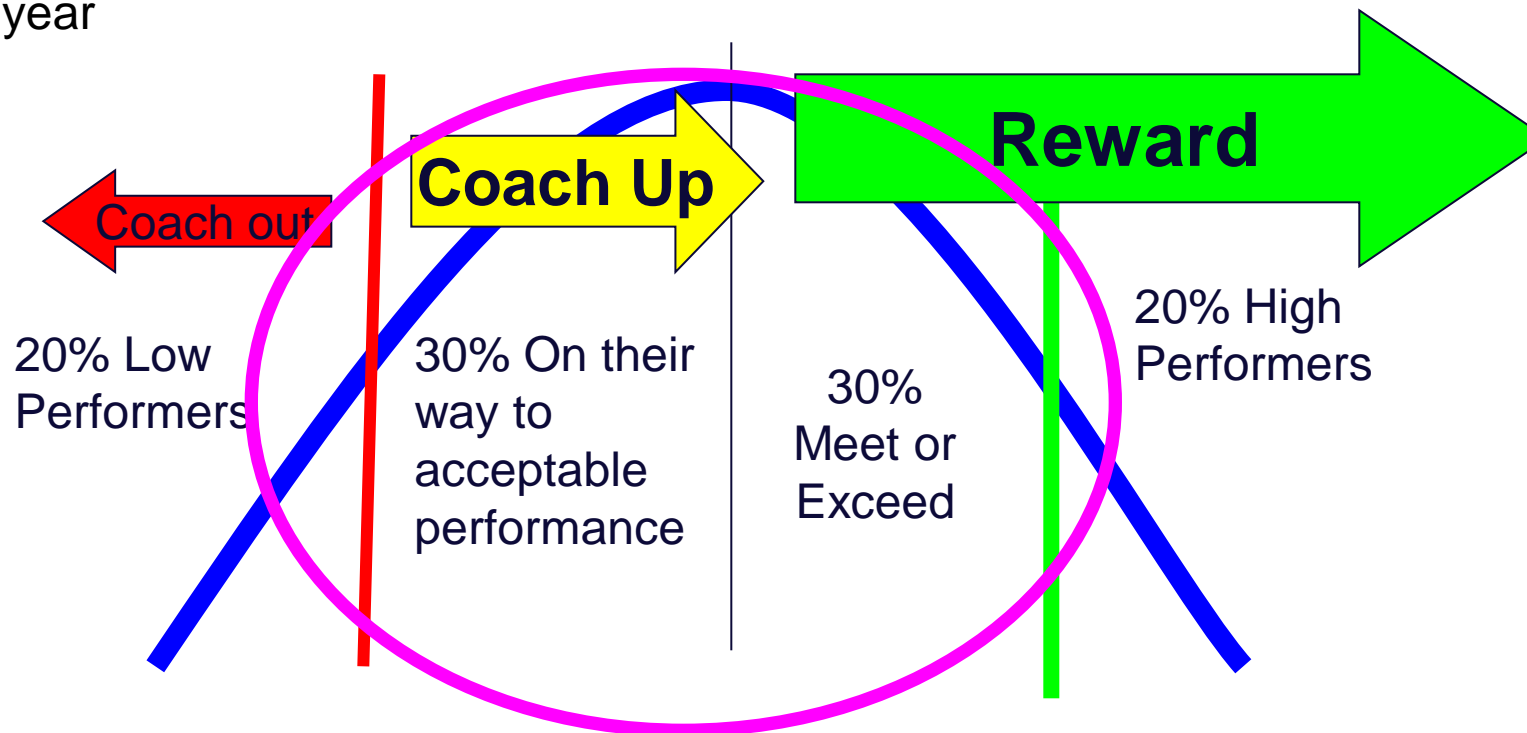
Coach up or Coach out?



- Even in today's employee climate focusing on work performance remains a key management responsibility. Managers today must be able to engage and support their teams.
- Fortune Magazine says failure to effectively manage low performers is the **#1 reason why leaders fail and lose their jobs**.
- 87% of employees say working with a low performer has decreased their productivity, hampered their development, and made them want to change jobs.

Improve or Remove

- Coach up 80% every year
- Coach out 20% every year



Defining Successful Results

Clinical KPIs

Clinical Social Worker

Will have 99% accuracy in entering information in the EHR.

No show/cancellation rate will be below 10%

Meet recovery goals through change of level of care within set time frame 90% of the time

Complete targeted direct service hours, 1352 hours per year

100% of events provided will be on the active treatment plan.

Collaborative documentation is the expectation and all notes completed same day of service

Non-Clinical KPIs

Front Desk Staff

99% of copays will be collected at the time of service

85% of all appointments that are canceled within 48 hours will be backfilled

100% of all confirmation calls will be completed prior to 48 hours of service

All consumer financial and demographic information will be refreshed at each visit

Will have 99% accuracy in entering information in EHR

All calls are answered by 3rd ring

Will have less than 2% dropped call rate

Intake paperwork will be processed same day of service

Coaching for Success

Step by step

1. Describe what you want done
2. Be Specific
3. Obtain agreement
4. Define skills/competencies needed
5. Jointly decide on a completion
6. Establish mini-goals
7. Discuss the benefits
8. Confirm the employees understanding of the tasks
9. Assign authority and responsibility
10. Follow up



Individual Supervision Logs

- Individual Supervision logs review both clinical and business goals of the agency
- Sets Training and Competency Plans and Expectations



Individual Supervision Log – Clinical

Staff Member:		Supervisor:	Program/Dept:
Topics Discussed: (Check all that apply)			
<input type="checkbox"/> Assessments	<input type="checkbox"/> Cultural Competency	<input type="checkbox"/> Caseload	<input type="checkbox"/> Professional Development
<input type="checkbox"/> Treatment Plans	<input type="checkbox"/> Clinical Outcomes/DLA20	<input type="checkbox"/> Employee Satisfaction	<input type="checkbox"/> Boundaries/Legal
<input type="checkbox"/> Direct Service Standards	<input type="checkbox"/> Payor Mix	<input type="checkbox"/> Progress Notes	<input type="checkbox"/> Treatment Fidelity
<input type="checkbox"/> Utilization Management	<input type="checkbox"/> Ethics/Professional Standards	<input type="checkbox"/> Consumer Satisfaction	<input type="checkbox"/> Other:
<input type="checkbox"/> DNKA Rates	<input type="checkbox"/> PTO/Tardiness	<input type="checkbox"/> Risk Factors	
<input type="checkbox"/> Treatment Interventions			
1. Topic(s) Summary (Provide a brief summary of the issues/needs in the topic(s) indicated above):			
Type here			
2. Accomplishments/Strengths/Progress Since Last Supervision Session:			
3. Support Plan (Complete if change needs identified require employee action beyond this supervision session):			
a. Specific Change/Performance Requirements Needed:			
Increase direct service to 2 additional hours per day, schedule 34-38 client hours			
b. Performance Improvement Indicators Required:			
c. Date Action Plan to Be Completed: 10/31/19		d. Progress Review Date: 10/25/19	
► Clinical Supervision Comments/Instruction (complete this section only if supervision is provided):			
► Competencies: <input type="checkbox"/> No data reviewed <input type="checkbox"/> Documentation reviewed/see QMHP Review <input type="checkbox"/> Clinical Case Supervision			
♦ Employee/Contract Provider Comments:			
Employee/Contract Provider Signature		Supervisor Signature	
Date		Date	

Non-Clinical Supervision Logs



INDIVIDUAL NON-CLINICAL SUPERVISION LOG		
Staff Member:	Supervisor:	Program/Dept:
Topics Discussed: (Check all that apply)		
<input type="checkbox"/> Policies and Procedures	<input type="checkbox"/> Job duties/changes	<input type="checkbox"/> Efficiency Solutions
<input type="checkbox"/> Process Improvement	<input type="checkbox"/> Communication Issues	<input type="checkbox"/> Consumer Satisfaction
<input type="checkbox"/> KPI Review	<input type="checkbox"/> Professionalism	<input type="checkbox"/> Funding Sources
<input type="checkbox"/> Behavior/Attitude	<input type="checkbox"/> Professional Development	<input type="checkbox"/> Cooperation/Participation
<input type="checkbox"/> Time Off	<input type="checkbox"/> Tardiness	<input type="checkbox"/> Accuracy of Work
<input type="checkbox"/> Performance Evaluation Review	<input type="checkbox"/> Observation	<input type="checkbox"/> Staffing updates
<input type="checkbox"/> Weekly Priorities	<input type="checkbox"/> Follow-up Items	<input type="checkbox"/> Values, Vision & Mission
1. Topic(s) Summary (Provide a brief summary of the issues/needs in the topic(s) indicated above):		
Employee Comments:		
2. Accomplishments/Strengths/Progress Since Last Supervision Session:		
3. Action Plan (Complete if change needs identified require employee action beyond this supervision session):		
a. Specific Change/Performance Requirements Needed:		
b. Performance Improvement Indicators Required:		
c. Date Action Plan To Be Completed:	d. Progress Review Date:	
4. Support Plan (Complete if change needs identified require employee action beyond this supervision session):		

- Non-Clinical Supervision logs review both administrative, business and support goals of the agency
- Sets Training and Competency Plans and Expectations
- Used to communicate team goals and needs

Managers Roles in Managing/Mentoring Staff Performance Areas



- Addressing inappropriate/under performance at the earliest possible time after KPI reports are created
- Provide objective measurement to support performance issues with staff or program
- Identify the performance levels that you would like to see and discuss them in staff meetings, in individual supervision sessions, etc.
- Request that staff meeting the KPIs provide a case study to other staff on how did it...
- Celebrate every possible victory (change)... Reinforce appropriate behavior/performance

Is it just me....

- The problem of motivating teams to peak performance is a matter of lack of reinforcement. When you don't get enough reinforcement for what you're doing, your attention wanders. And so does your performance.
- Be deliberate with reinforcement for all performance expectations (remote, hybrid, in-person)



What Motivates Staff?

- The amount of reinforcement needed to keep people focused on their work is relative to the amount of reinforcement available in the environment.

What Motivates Staff?

- Depending on the culture, the fewer distractions in the workplace, it takes very little reinforcement to keep people on task.
- If there are a lot of distractions available, it takes a lot of reinforcement to keep people focused.

Top 5 Retention Strategies ¹⁰

- Culture of Wellbeing and Flexibility
- Successful Onboarding
- Job Advancement/Training
- Market Based Compensation
 - Remote
 - Hybrid
 - In-Person
- Financial incentives
- Support and Recognition from supervisors and managers
- Additional benefits such as tuition reimbursement, health insurance and pensions ¹¹



¹⁰ Source: Peter Hart, CEO Rideau Recognition: raise the Red Flag-retention Recession

¹¹Source: SHRM State of the Workplace Study 2020-2021 . SHRM.org

Best in Class Onboarding



- Team member success begins at New Employee Orientation. The New Employee Orientation schedule should align with the organization's best practice guidelines for evidenced-based practices ¹²
- The goal of onboarding is to increase competency and retention by familiarizing new employees with their job, the workplace culture, and other employees so they feel welcome and prepared. With the high cost of recruiting, leaders must understand integrating new hires into the organization is an important step to ensure their success. Onboarding is an acclimation process that should engage new employees to quickly make them an effective worker while maximizing their satisfaction ¹².

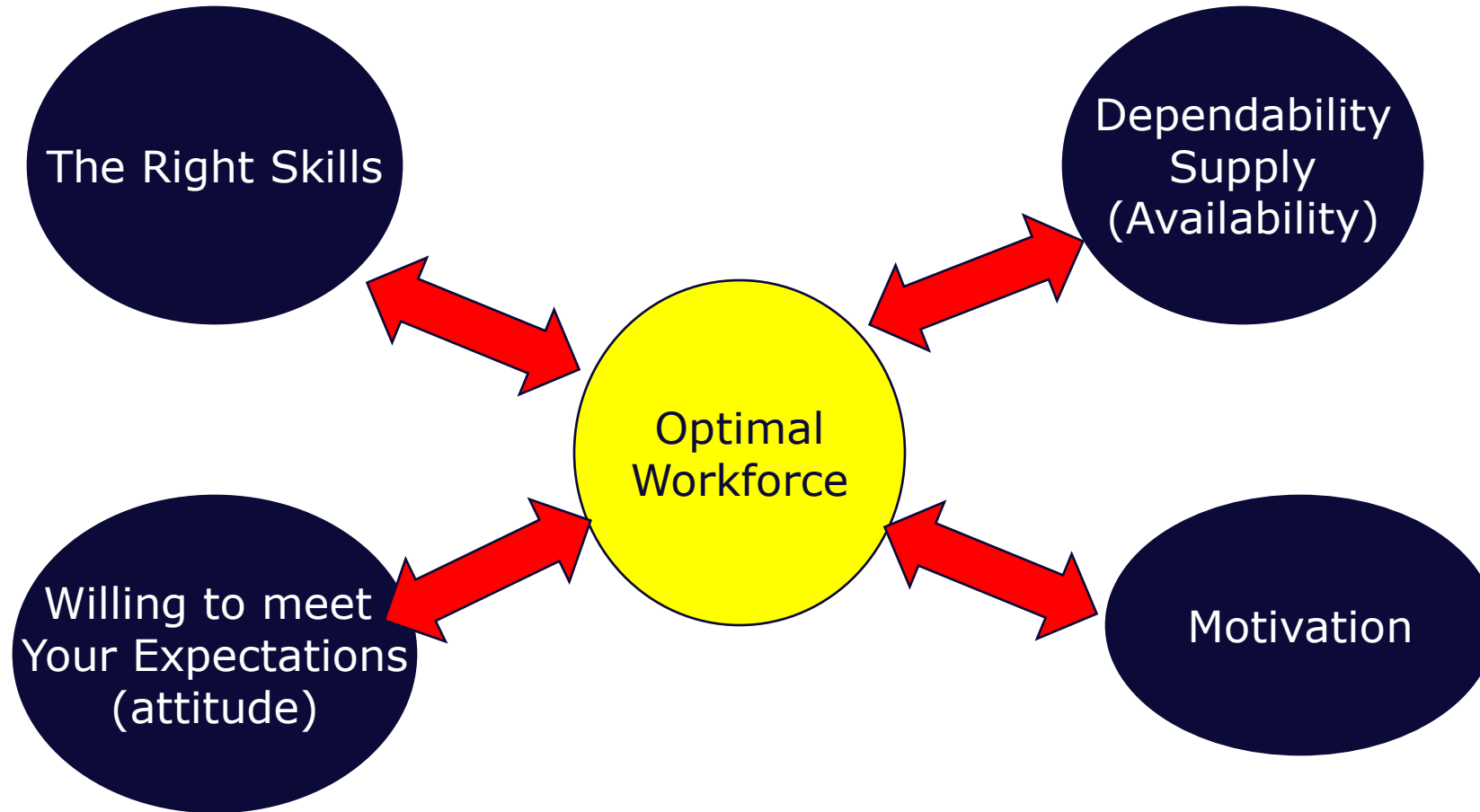
¹² Source: Sonja Jacob. (2018). The 7 Benefits of an Onboarding Program. Retrieved from Workest.

Retention Strategies

- 54% of organizations are now budgeting promotional increases separately from merit increases, up from just 51% in 2019 ¹³.
- “Employers are finding ways to deliver pay increases through other means like promotions, which reflects the growing trend of focusing on careers and sustained performance, not a one-year snapshot and reward,” ¹³
- Develop pay differentials for remote, hybrid or in-person

¹³ Source: Mercer 2019/2020 Compensation and Planning Survey

Look for the Combination of Factors that support the Optimal Workforce



Retention Strategies: Length of Service and sign on/retention Bonuses and Tenure Recognition



- Sign on Bonus
 - Offered to staff at the beginning of employment to encourage follow through and to demonstrate commitment from the employer
- Retention Bonus
 - Offered to current staff to stay on during transitions and various intervals or the completion of tasks
- Length of Service Bonus
 - Regular Full-Time and part time employees extended and continuous length of service by issuing a bonus as part of the regular paycheck in accordance with the following schedule

Length of Service Bonus

<u>Length of Service</u>	<u>AMOUNT</u>	<u>TIME OFF</u>
1-5 years	\$500.00	Varies
10 years	\$1000.00	Employment anniversary date off in 10 th year
15 years	\$1500.00	Employment anniversary date off in 15 th year
20 years	\$2000.00	Employment anniversary date off in 20 th year
25 years	\$2500.00	Employment anniversary date off in 25 th year
30 years	\$3000.00	Employment anniversary date off in 30 th year
35 years	\$3500.00	Employment anniversary date off in 35 th year
40 years	\$4000.00	Employment anniversary date off in 40 th year



Compensation Analysis

- Review market analysis
- Create compensation philosophy
- Offer up to 5-7% annual increases based on performance
- Base pay is at least 10-20% above the Regional Market



Recruitment Bonus



- Finding staff that match your culture is difficult
- Use your greatest spokes person... your staff

Staff Recruitment Strategies to set you apart

- Indeed
- Glassdoor
- LinkedIn
- Trades
- Social Media
- Employees
- Lead with your Organizational Culture, Values and mission
- What Opportunities are there for advancement, education
- How flexible are you?
- What sets you apart
- Use your Team members as your best marketing and recruitment plan

Sample 90 Day Plan

(90-DAY PLAN): Organizational Climate:

DATE: _____

<u>Issue</u>	<u>Resp Persons</u>	<u>ANNUAL GOAL</u>	<u>Area of Improvement</u>	<u>30 - DAY BENCHMARK</u>	<u>45 - DAY BENCHMARK</u>	<u>ACTION STEPS</u>	<u>RESULTS</u>
Staffing and Coworkers							
Recognition and Growth							
Leadership							
Compensation and Benefits							
Physical environment							
Quality							
Satisfaction							

- Questions?
- Feedback?
- Next Steps?
- Thank you!
- Contacts:
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