



2022 Strategic Planning Report

for the

National Association for Health Care Recruitment

March 2022

Prepared by Dave Wenhold, CAE, PLC

August 2022

Updated by Tonya Wade, CAE

Contents

Background and Methodology..... 3

Strategic Plan SWOT and Data Review 4

2022 Strategic Plan Overview..... 5

2022 Strategic Plan Action Items 6

Strategic Goal: Create a Forward-Thinking Communications Plan..... 7

Strategic Goal: Increase Member Engagement 9

Strategic Goal: Revamp Board Governance Structure 12

Conclusion 14

Background and Methodology

This report represents the review, discussion, and compilation of strategic goals and objectives for the new 2022 Strategic Plan (SP) for the National Association for Health Care Recruitment (NAHCR) conducted in February 2022 by Dave Wenhold, CAE, PLC of the Kautter Wenhold Management Group (KWMG).

The SP resulted from the NAHCR Board of Directors' review of short-term goals and objectives in the 2020 .orgSource marketing plan, review of association specific strategic planning articles, as well as identifying activities that remain relevant for the upcoming 1 – 2 years. Additionally, new strategic priorities were identified through information gathered during in-person planning session in Orlando. Action items included as part of the new SP capture recommendations from the collaborative NAHCR Board working session in February.

The 2022 SP is meant to be a living and dynamic document that serves as a guide for the organization and volunteer leaders, and they move into a post-pandemic world and provide targeted benefits for the membership of the organization. The plan's actionable items better position NAHCR to continue to provide superior membership value through enhanced member communications, education, and organizational efficiencies.

In support of commonly accepted practices in the nonprofit community, KWMG firmly believes that strategic planning is most effective with a focus on the long-term mission and vision of the organization while delivering tangible deliverables in the short-term (one to two years). Creating longer-term strategies and tactics may be untenable due to unforeseeable socio-economic changes. The quick onset of how COVID affected associations in 2020 is a clear example of the need for associations to be nimble. KWMG encourages NAHCR to continually conduct an environmental scan to “keep its finger on the pulse” of the profession, member needs, and the industry at-large – to ensure that the SP priorities remain relevant.

Fortunately, NAHCR is led by a high-functioning, passionate, and dedicated volunteer Board of Directors. The action items identified by the NAHCR Board will allow the association to ascend to the next level of its organizational growth. Since the beginning of our partnership with NAHCR, we have been excited to see that the Board was willing to challenge the status quo and continually look for new ways to add valuable components that increase member value.

One final comment, strategic plans are only as good as the organization's commitment to follow through on the agreed-upon priorities and actionable items. Individual board/committee member's accountability to his/her areas of responsibility within the SP will also dictate success or failure of the overall plan. In short, the plan is only as strong as each individual's commitment to its success.

Strategic Plan SWOT and Data Review

To better identify areas of focus for the creation of the strategic plan, the Board and KWMG team reviewed the information of the 2020 SWOT analysis conducted by .orgSource (see page 26 of the attached marketing plan) to see if it is still on point in the current, and post-pandemic, environment. While many components of the SWOT analysis still hold true, some things have changed, and the SWOT analysis was revised to incorporate new items that were identified during the on-site working session.

- For example, since the pandemic started in 2020, health care recruitment has become more challenging and the cost of recruiting and retaining permanent staff has skyrocketed. Many prospective candidates who were traditionally looking for permanent work are now looking for traveling positions. They are capitalizing on the shortage and cashing in, thus making the fulfillment and successful placement rates for our average member very challenging. Previously, our members were mostly competing with other facilities for talent and could budget appropriately. It is much more difficult when the workforce has seemed to become more mercenary in their financial goals. This is a big shift from just 24 months ago and it increases the pressure on the average member to try and fill impossible roles with the current money grab. This was just one area that we focused on during our discussion.

Related to reviewing the previous SWOT exercise, the NAHCR Board discussed the *NEW NORMAL* that we all are dealing with in a pandemic world. We discussed what it looks like from the perspectives of members, employers, the industry and the organization. Key takeaways were:

- Scarcity of applicants
- Pipeline issues
- Lack of engagement from candidates
- Employers are more reactive and forced to come up with more dollars for candidates than before COVID
- Members and employers are caught in a stress loop that wears on all sides of the recruitment process like never before
- Many people are emotionally drowning due to the stress
- Telemedicine is much more popular
- Remote work is leading to more isolation and less connection (this is where NAHCR could capitalize on as the community to bring members and potential members together)

KWMG Headquarters staff also did a deep dive on the analytics on how members and visitors interact with NAHCR's website and social media feeds. The data was presented to the onsite group and here are a few takeaways from that discussion.

- Most interactions come from people directly searching out NAHCR with a web browser search (Direct/organic search), followed by a referral (i.e., hyperlink from email blasts or other) and finally social media.
- Social media analytics demonstrate that our members interact most with LinkedIn. Second was Facebook, with Twitter a very distant third, showing that we should focus our communications more in the first two areas.

2022 Strategic Plan Overview

KWVG believes in providing strategic planning facilitation which results in actionable items that are clear, concise, and tangible.

We also recognize that volunteer health care recruitment leaders have complex, full-time careers, which can limit participation and attendance at board activities. With the information gathered during an interactive strategic planning exercise, we were able to identify priorities that align with the mission of the organization, which were narrowed to four areas of concentration that the Board will focus on in this SP, listed below in order of importance:

1. **Communications Plan**
2. **Membership Engagement**
3. **Board Governance Structure**
4. **Member Resources**

The NAHCR Board then began fleshing out the four strategic goals (to include specific tasks) that need to be accomplished to address these four areas of concentration.

For planning purposes,

- *Strategic Goal:* What will be accomplished
- *Action Steps:* Specific tasks needed to complete the goal
- *Prioritization:* High, Medium, Low
- *Responsibility:* Board or committee member responsible for action steps

This SP is designed to be implemented and completed no later than December 2023, with many components slated for completion within the next six to 18 months. After that time, we suggest that the NAHCR Board review and reassess the next round of priorities and create a similar plan.

2022 Strategic Plan Action Items

Below are the overarching four strategic priorities for the NAHCR Board of Directors.

1. **Create a Forward-Thinking Communications Plan**
2. **Increase Member Engagement**
3. **Revamp Board Governance Structure**
4. **Increase Member Resources**

Strategic Goal: Create a Forward-Thinking Communications Plan

Action Steps: Implement a plan that highlights member benefits and the collective knowledge information sharing resources which will provide key, pertinent and timely information to members. The goal is to make NAHCR the “go-to” resource, and preferred association for those in the health care recruitment field.

Actions steps are as follows:

1. Investigate the creation of a podcast series that provides exclusive content, which helps our members with their day-to-day jobs and career development.
2. Collection of cell numbers from member interaction. This will allow us to text critical information to members. It also provides a different touch point and delivery system to members.
 - a. Explore potential business partners and cost
3. Creation of short (60-120 seconds) video content for sharing association information. Also, can used for welcome to new members, for pre-renewal messaging as well as for lapsed members.
 - a. Message in a Minute
4. Refocus social media strategy by posting more content instead of relying overly much on promotion posts
 - a. Secure original content
 - b. Determine “tone and tenor” of NAHCR
5. Create a positive NAHCR testimonial campaign to highlight energy and passion of our members.
6. Develop and implement an action plan for leveraging the podcast sponsorship
 - a. Draw podcast guests into NAHCR by offering them free 2022 memberships for them and their team and by extending invitations to them for future speaking engagements (webinar or at conference)
 - i. HQ to share membership status of guests/organizations for which they work
 - b. Market podcasts to NAHCR members and prospects through e-flashes and social media
 - c. Market NAHCR to nonmember podcast listeners through promotional announcements

- d. Capitalize on social media posts
- 7. Collect and post real members pictures on website. Replace stock photos with images of NAHCR members in their workplace and at NAHCR events.

Timeline:

- 1. DONE
- 2. Collection of cell numbers and permission to text is in process; exploration of potential business partners and costs tabled until participation is evaluated (January 2023 F2F meeting)
- 3. Monthly beginning September 2022
- 4.
 - a. As available
 - b. Implemented as part of future marketing initiative
- 5. Pending receipt of video testimonials
- 6. In process

Responsibility:

- 1. Marketing & Communications Team
- 2. HQ
 - a. Partner Member at-Large
- 3. Marketing & Communications Team
 - a. President
- 4. Marketing & Communications Team
- 5. Marketing & Communications Team
 - a. Rollis Fontenot
- 6. Headquarters | Marketing & Communications Team

Prioritization:

High

Strategic Goal:

Increase Member Engagement

Action Steps:

NAHCR should be the “need-to-have” (as opposed to “nice-to-have”) resource where those in the health care recruitment field and go to for information and to collaborate with like-minded individuals. To be the critical factor to those in the health care recruitment field, we must meet their needs and be there are every juncture of their professional career, from cradle to grave. The Board reviewed the mission and vision statements and may want to revisit them to make sure the current versions still meet the needs of the members. One particular area that was discussed was that NAHCR seems to appeal to individuals in the beginning to mid-stage of their careers. After that, data seems to indicate that we do not maintain them as effectively as we should later in their careers. We need to do a better job of providing value to those individuals who are mid-late career professionals. Understanding that membership engagement is the lifeblood of the organization, it is crucial to get members more involved in the organization. The pandemic has further exacerbated people pulling back from most types of engagement. Creating new ways for members and prospects to engage with NAHCR will be critical to fighting apathy and invigorating the passion and interest of individuals when they originally joined the organization.

1. Reorganize the content on the Learning Management System (LMS) to a more user-friendly system and have it broken out by subject matter categories instead of dates of creation.
2. Rebrand and refresh NAHCR On Demand offerings.
3. Create recruitment “best practices” resource center from input from the average dues paying member (free for members, for sale to nonmembers).
 - a. Create a call for best practices among members.
 - b. Tap into current CHCR’s as SMEs and ask that they assist with the above resource collections. For their participation offer them discounts on membership, conference registrations, etc.
 - c. Explore collaborations with other organizations, ex., joint webinar with ASHHRA
4. Engage the vendor members to provide content to a members-only microsite on the NAHCR website

regarding their offerings (short video clips and explanations of who they are and how they can help our members succeed).

5. Identify what would be vital information to have for a benchmark data survey. This has been discussed for a very long time and some serious thought needs to be put into what is needed, what is valuable information to collect, identifying outside consultants that specialize in providing this (maybe someone within the industry/vendors/etc.), and what a study might cost.
6. Work with seasoned professionals (ad hoc task force) to identify offerings that will encourage mid-late career professionals to stay and be active in the membership.
7. Explore alternative membership categories and payments.
 - a. Include in Partner memberships recruiter memberships for them to give away
 - b. Monthly memberships
 - c. Dual memberships (National and Chapter)
8. Create excitement around onboarding new members and have a new member highlight program on social media and other media platforms.
9. Provide a meaningful mentorship program. This will help cement both the mentee and mentor to the organization long-term.
10. Recognize new CHCR's with member spotlight activity.
11. NAHCR should highlight the referral program more.
12. Create fundraising opportunities.
13. Develop "Fireside Chats" or town hall forums for understanding the needs of the members and sharing new information.
14. Hold a virtual open house for membership prospects (Membership 101)
15. Better leverage Listserv Live events by
 - a. Offering CHCR credit for attendees
 - b. Posting snippet of the content to social media after the event that amplifies its value as content and creates more visibility for NAHCR

Timeline:

1. Tabled pending decision on contract work
2. Tabled pending decision on contract work
3. By end of 2022
 - a. By September 15, 2022
 - b. By November 30, 2022
 - c. In process

4. Tabled
5. By October 7, 2022 (Board has identified a potential partner who will provide benchmark data at a discount to NAHCR members)
6. TBD
7. Tabled
8. DONE (Link to .jot form added to New Member Welcome Email)
9. Tabled
10. DONE (HQ submits .jot form for announcement and a link to .jot form for spotlights added to CHCR Congratulations Email)
11. Ongoing
12. Tabled
13. Tabled
14. Tabled
15. In process

Responsibility:

1. Education Team | Headquarters
2. Education Team | Headquarters
3. Membership Team | CHCR Subcommittee | Headquarters
4. Partner Member at-Large
5. Executive Committee
6. Executive Committee | Headquarters
7.
 - a. Partner Member at-Large
 - b. Headquarters
 - c. Chapter Engagement Director
8. Membership Team | Headquarters
9. Membership Team
10. Headquarters
11. Headquarters
12. TBD
13. Marketing & Communications Team
14. Membership Team | Marketing & Communications Team
15. Chapter Engagement Team

Prioritization:

High/Medium

Strategic Goal:

Revamp Board Governance Structure

Action Steps:

Many years ago, the NAHCR Board reduced the size of the Board due to financial concerns and the desire to be nimbler in the decision-making process. Since then, the NAHCR Board has made do with fewer leaders and volunteers at the top level. During this planning process, it was suggested that there might be value in ensuring that the Immediate Past President remains engaged with the Board as well as potentially adding an additional seat at the Board table to increase input and knowledge sharing. Additionally, it was suggested that there may be more opportunities for Board development and training, which would help take the Board to a higher level of governance. Finally, it was discussed that NAHCR needs to be more intentional in succession planning at the Board and committee levels. Many of our leaders come from one or two active chapters or states and it seems like a missed opportunity to not engage more people for leadership decisions.

1. Review Articles of Incorporation, bylaws and policies and procedures to determine how best to add an additional seat on the Board.
2. Create Board development and training opportunities. Need to poll the Board on where they individually feel they need more training to be successful in their current and future roles for the organization.
3. Work on a succession planning document for current Board and committee leaders. Need to identify next generation of leaders.
4. Develop Board onboarding process and orientation for new members of committees/Board.

Timeline:

1. DONE
2. By September 30 (for discussion at October 3 board meeting)
3. November board meeting
4. In process (Onboarding and orientation process created, needs to be refined based on board feedback [to be gathered by September 30])

Responsibility:

1. Headquarters
2. Headquarters

3. Executive Committee
4. President | President-Elect | HQ

Prioritization:

Medium

Below are other areas that NAHCR discussed and considered but did not gain consensus on as top priorities during the planning meeting. These areas might be worth reconsideration in the future.

- Developing core values
- Building community
- Focusing on revenue generation
- Rebranding the organization and how the industry views itself
- Creating an advanced CHCR exam

Conclusion

The National Association for Health Care Recruitment is very fortunate in many circumstances. It has a caring and forward-thinking Board and a knowledgeable and committed staff, and it survived the pandemic better than most associations. KWMG has done over two dozen strategic plans in the past four years for different groups. Based on that experience, if NAHCR can successfully implement many of the tasks identified in the SP, it will be a great leap forward in the members' return on their investment as well as the time spent by the Board to create this plan.

Kautter Wenhold Management Group is honored to work with such dedicated and hard-working volunteers. We understand that the organization is charging ahead and working on increasing member value, thanks to the passion and dedication by the volunteer leadership. Through our collaboration with NAHCR leaders, with implementation of many of the recommendations in the strategic plan, the association will enhance its organizational effectiveness, long-term sustainability and increase member satisfaction. We recommend that NAHCR does a six, nine, 12 and 18-month check in with the full Board to ensure that implementation, and that the strategic plan itself still remains meaningful.