



Consulting | Education | Interim | Resources

Implement a Team-Based Recruitment and Retention Strategy to Align with the Facility Assessment

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Objectives

- Identify the key components of recruitment and retention plans that align with the facility assessment.
- Describe how to implement a team-based approach for recruitment and retention.
- Review three tools that attendees can implement within their organization to support their workforce strategy.

2

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Understand Changes

Minimum Staffing Standards

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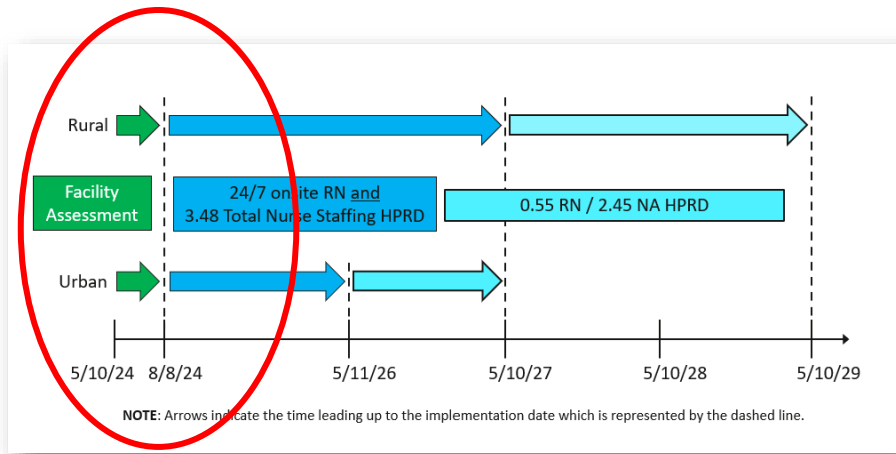
Minimum Staffing Standards

- May 10, 2024
- Four main parts
 - Phase 1 - Facility Assessment
 - Phase 2 - 24/7 RN on-site requirement
 - Phase 2 - Total Nurse Staffing HPRD requirement
 - Phase 3 - RN/NA minimum staffing HPRD
- Medicaid payment transparency
- Staggered implementation

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Staggered Implementation



5

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DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop C2-21-16
Baltimore, Maryland 21244-1850



Center for Clinical Standards and Quality/Quality, Safety & Oversight Group

Ref: QSO-25-14-SH

DATE: March 10, 2025

TO: State Survey Agency Directors

FROM: Directors, Quality, Safety & Oversight Group (QSOG) and Survey & Operations Group (SOG)

SUBJECT: **REVISED** Revised Long-Term Care (LTC) Surveyor Guidance: Significant revisions to enhance quality and oversight of the LTC survey process

Memo Revision Information:

Revisions to: QSO-25-12-SH

Original release date: January 16, 2025

Memorandum Summary

Revised Surveyor Guidance: CMS is releasing the following revised guidance for nursing home surveys:

- Admission, Transfer & Discharge, Chemical Restraints/Unnecessary Psychotropic Medication, Resident Assessment, Nursing Services, Payroll Based Journal, Quality of Life and Quality of Care, Administration, Quality Assurance Performance Improvement (QA/P), Infection Prevention and Control, and other areas.
- Clarifications and technical corrections have also been made throughout Appendix PP.

Associated Training and Resources:

- Training on this guidance will be available upon release of this memorandum for surveyors and providers.
- Advance copy of the Critical Element Pathways are attached to this memo.
- Advanced copy of Appendix PP is attached to this memo.
- Revised Survey Resources will be posted on *April 28, 2025*.

Effective Date: *Revised to move implementation from March 24, 2025 to April 28, 2025.* Surveyors will begin using this guidance to determine compliance with requirements on surveys beginning *April 28, 2025*. This allows ample time for surveyors and nursing home providers to be trained on this new information.

Added revised guidance and training for Nursing Services and Payroll Based Journal to the updates for Appendix PP and the Long-Term Care Survey Process and revised the effective date of implementation for all new guidance to *April 28, 2025*.

Prepare
Plan
Implement



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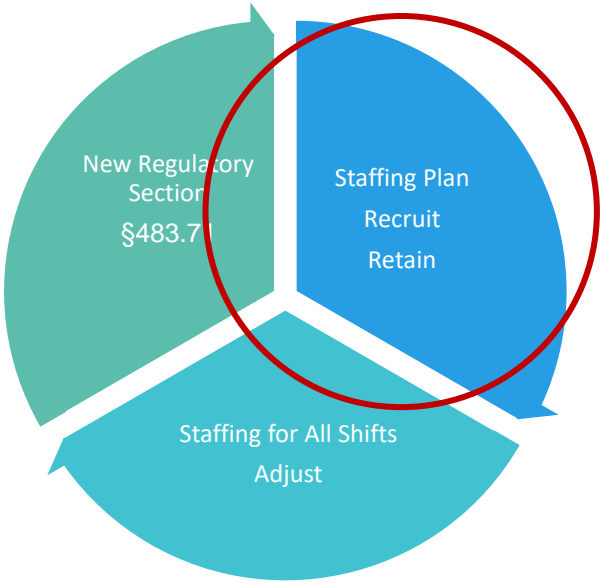
Facility Assessment
Expansion



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Facility Assessment
Expansion



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Facility Assessment

Three Components

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Three Components



11

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Facility Assessment

Staffing Plan - Recruitment and Retention

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Resources
Personnel



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Staffing Plan



14

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Person Centered Staffing Plan

Facility Assessment/Source Documents:

Informs staffing decisions

- Number
- Qualifications
- Job roles
- Job descriptions
- Shifts
- Location
- Skills and competencies
- Develop staffing model



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Recruitment and Retention

Based on the Facility Assessment

- Identify recruitment needs
- Recruitment/Retention – planned and purposeful approach
- Review and refresh our current processes



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Recruitment and Retention

Interconnected

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Recruitment

- Process to fill open positions
- Must be planned
- Incorporates strategies to
 - Seek
 - Attract
 - Hire
- Major driver for sustained success and growth
- Direct impact on quality outcomes

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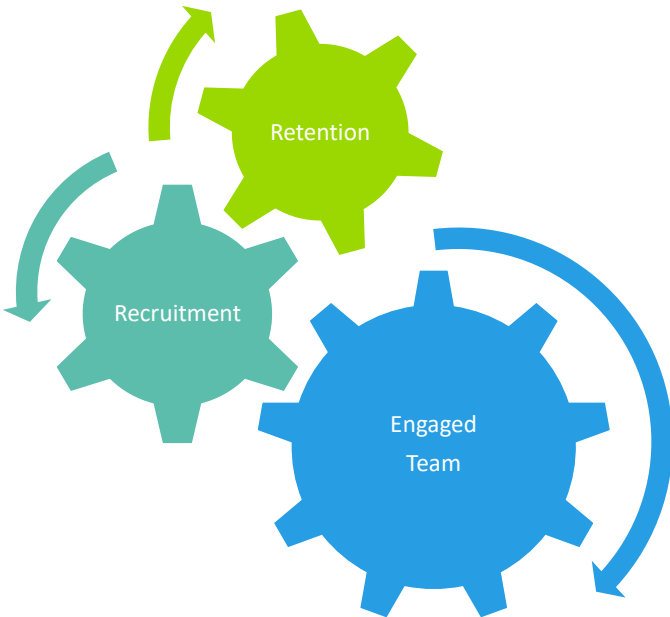
Retention

- Process to keep talent
- Must be planned and intentional
- Key to facility's ability to:
 - High-quality care
 - Efficiency
 - Cost reduction
 - Sustainability
 - Maintain competitive advantage

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Recruitment Process and Plan

Let's Take a Look

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Team Based Approach

- Develop a team – fresh perspective
- Diverse group of employees
- Key stakeholders
- Across
 - Departments
 - Job roles/functions
 - Shifts
- Assign a lead



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Important – “Good Faith Effort”

- Document
 - Job listing and sourcing efforts
 - Number and duration of openings
 - Wage scales and compensation packages – competitive
 - Data on average wages per BLS
 - Contract labor expenses
 - Demonstrated financial commitment
 - Recruitment and retention plan – documented and updated

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Recruitment Plan Components

- Team members
- Lead
- Identification of Needs
 - Short term and long-term goals
 - Open positions
 - Competencies and skills necessary
 - Workforce availability
 - Competitive Review
 - Organization priorities



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Recruitment Plan Components

- Recruitment team approach
 - Target audience
 - Previous hiring methods that worked
 - Determine key messaging
 - Revision of messaging
 - Develop messaging calendar



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Recruitment Plan Components

- Sourcing of candidates
 - Job board postings
 - Job Fair
 - Social Media recruiting and outcomes
 - Facility website
 - Other employee sites
 - Employee referrals
 - Schools/universities
 - Other



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Recruitment Plan Components

- Investment/Financial commitment
- Review of analytics and outcomes
- Revision of plan for next month



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Example

Template Facility Recruitment Plan	
Area	Response
Date of Review	
Recruitment Team Participants	
Actions Taken Based on Review	

- Documentation of plan
- Actions taken
- Outcomes

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Identification of Needs

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Identification of Needs				
Personnel Needs Assessment Completion	Short Term Goals			
	Long Term Goals			
Open Position Review <ul style="list-style-type: none">• Total Positions• Positions by job category• PTE/FTE• Length of time positions have been open• Forecast Needs				

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Identification of Needs

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Specific Competencies and Skills Needed <ul style="list-style-type: none">Traits of the ideal candidateMost important qualifications for open positionsEducation level expectations				
Review of Current Job Descriptions				
Workforce Availability Review				
Competitive Review				
Organization Program Changes, Strategic Priorities that may impact recruitment needs.				

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Approach

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Approach				
Determine target audiences				
Previous hiring methods that worked				
Determine key messaging points – why choose our facility, why join our team, features, and benefits				
Revise the messaging for external and internal sources				
Develop messaging calendar				
Other:				

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Sourcing of Candidates

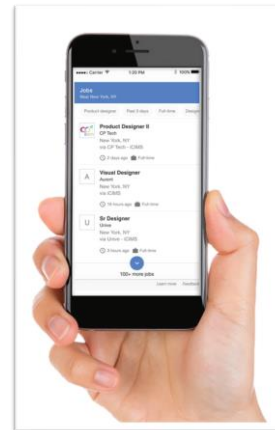
Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Sourcing of Candidates – Outreach Strategies				
Job Board Placement				
Job Fair				
Social Media Recruiting Channels <ul style="list-style-type: none"> List Channels Used Outcome Analytic Review 				
Facility Career Page – Posting				
Other Employment Sites– Posting				
Partner Sites – Posting				
Retiree Sites– Posting				
In-Person Events				
Virtual Events				
Employee Referrals				
Networking Events				
Conferences/Associations				
Schools				
Universities				
Advertisement				
Brochures/Flyers				
Mailers				
Thought Leadership Communications				
Other:				

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Quick Tips

- Place a focus on non-traditional audiences
- Veterans, military spouses
- Displaced workers
- Emerging leaders
- Second career
- New to PAC
- Older Adults
- Mom/Dad around school schedules
- Women re-entering the job market



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Quick Tips

- Employer Brand
- Sets You Apart
- Recruitment Today – Tell Your Story!
- #1 Strategy to get talent to your door!

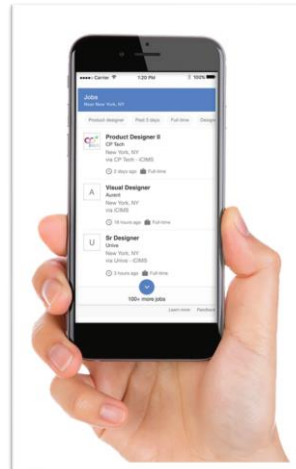
Question	Thoughts/Answer
What makes our organization unique? <i>(What sets us apart from other health care organizations?)</i>	
Why do you stay here at this organization?	
Name 3 words that best describe our organization.	
What does our website and social media accounts say about our organization and does the message match our answers above? <i>(Look at your website and social accounts)</i>	

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Quick Tips

- Turn team into “social recruiting army” with your employer brand
- Average network size of a company’s employees is 10x larger than its own
- Job posts - first contact candidates have with your company, so they’re a perfect way to promote your employer brand
- 300-500 words or less



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Quick Tips

- Application process
- Try it!
- Ease of use
- # of clicks to apply
- Candidate communication
- Ask new hires
- Ask your team – they know the answers



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Recruitment Thoughts – Emerging Leaders



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Investment – Financial Commitment

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Approach				
Determine target audiences				
Previous hiring methods that worked				
Determine key messaging points – why choose our facility, why join our team, features, and benefits				
Revise the messaging for external and internal sources				
Develop messaging calendar				
Other:				

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Retention Process and Plan

Let's Take a Look

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Team Based Approach

- Develop a team – fresh perspective
- Can be same team
- Diverse group of employees
- Key stakeholders
- Across
 - Departments
 - Job roles/functions
 - Shifts
- Assign a lead



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Retention Importance

- Consistent Care
- Cost savings
- Better team morale
- Knowledge and expertise retention
- Increased competitiveness
- Meaningful work and engagement
- Fosters growth

51% of employees are
watching opportunities or
actively seeking new jobs

--Gallop 2025

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5 C's of Retention



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Retention Plan Components

- Team members
- Lead
- Identification of Needs
- Retention and organizational goals
 - Short and long term
- Current workforce assessment – needs identified
- Retention metrics
- Factors impacting retention



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Retention Plan Components

- Organization approach for retention
 - Work-life balance initiatives
 - Talent development
 - Employee communication
 - Employee engagement
 - Recognition and reward
- Employee survey
 - Others
- Investment – financial commitment
- Outcomes measurement



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Example

Template Facility Retention Plan	
Area	Response
Date of Review	
Retention Team Participants	
Actions Taken Based on Review	

- Documentation of plan
- Actions taken
- Outcomes

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Identification of Needs

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Identification of Needs				
Retention and Organizational Goals	Short Term Goals			
	Long Term Goals			
Current Workforce Assessment Needs Identified <ul style="list-style-type: none">• Generational• Cultural• Diversity• Other:				

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Retention Metrics

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Retention Metrics Review				
Review of Retention Metrics: (see Recruitment and Retention Metric and Tracking Tool) <ul style="list-style-type: none">Prior MonthQuarterAnnual				
Overall Turnover Rate <ul style="list-style-type: none">Any changes or department/position trendsTenure average of employee				
Identify factors for workforce turnover and incorporate proactive initiatives into the overall plan				

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Organization
Approach

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Approach				
Work-life balance Initiatives				
Talent Development Initiatives <ul style="list-style-type: none">▪ Training and education opportunities▪ Talent development plans and needs▪ Mentorship programs▪ Career path opportunities▪ Leadership development▪ Other				
Employee Communication Initiatives				
Employee Engagement Initiatives				

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Organization Approach

Area	Metric Review, Prior Month Review, and Discussion Outcomes	Person Responsible	Completion Date	Actions Needed
Recognition and Reward Initiatives <ul style="list-style-type: none"> Employee of the month/year award Spot awards – immediate recognition award for exceptional work and effort noted on the spot Service awards – milestones in an individual's career with the facility including work anniversaries. Peer to peer recognition program Special days Emerging leader Participation in a team Other 				
Continuous Employee Feedback Initiatives				

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Investment – Financial Commitment

Investment – Costs and Financial Commitment				
Identify costs associated to retention initiatives.				
Review previous costs and correlation to revenue as well as operating budget				

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Quick Tips

- Communication Methods
 - Assess methods desired
- Multigenerational
- Routine
- Encourage feedback
- Fun and Innovative



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Quick Tips

- Engaging Onboarding is Key
 - *91% stayed through 1st year*
 - *69% stayed for 2.5 years*
- Starts before Day 1
- First Impressions



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Quick Tips

- Talent Development
- Mentorship
- Career path opportunities
- Feedback on performance
- Build a culture of coaching



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Example

Professional Development Plan	
Employee Name	
Date	
Current Title/Role	
Professional Goals and Aspirations <i>Work with the individual to map out their goals, and aspirations. This may include specific education, projects, or other areas that the employee wants to achieve.</i>	
Employee Skills and Abilities <i>Determine a baseline of current skills, talents, and abilities while identifying areas of opportunity for growth. Positive feedback is key to building confidence and readiness.</i>	
Development Opportunities <i>List each development opportunity and a corresponding goal.</i>	
Action Plan <i>Develop action steps that are individualized and achievable. (Plan, steps, costs, resource needs, etc.) Determine routine communication and meeting cadence with employees.</i>	
<i>Work with the employee to map out their professional development plan.</i>	



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Quick Tips

- Foster culture of recognition and rewards
- Thoughtful and planned recognition
- Most valuable asset!
- Ask your team
- Tailored to employees' interests



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Retention Thoughts – Emerging Leaders




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Review Outcomes

- Monthly
- Quarterly
- Annually
- Alignment with overall plan
- Revise plan
- QAPI

Leadership Checklist Recruitment and Retention Tracking					
Monthly Review Date					
Review Team Members					
Monthly Cost/Financial Investment Total	Recruitment Total:				
	Retention Total:				
	Combined Total:				
	Operating Budget:				
Additional Actions Needed	Difference:				
Metric	Track	"Good Faith" Metric	Tracking Tool Documentation	Facility Goal	Comments Actions Needed
Prevailing Wage - Competitive Wage and Compensation (Benchmark)	<input type="checkbox"/> Yes <input type="checkbox"/> No	X			
Job Listing Locations and Recruitment Forums (same as American Job Centers and other forums as appropriate)	<input type="checkbox"/> Yes <input type="checkbox"/> No	X			
Open Positions - Number and Duration	<input type="checkbox"/> Yes <input type="checkbox"/> No	X			
Job Offers Made (total)	<input type="checkbox"/> Yes <input type="checkbox"/> No	X			
Positions Align with Facility Assessment and Staffing Plan	<input type="checkbox"/> Yes <input type="checkbox"/> No	X			



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Metric	Track	"Good Faith" Metric	Tracking Tool Documentation	Facility Goal	Comments Actions Needed
Financial Resources - Costs, operating budget, relative to revenue	<input type="checkbox"/> Yes <input type="checkbox"/> No	X			
Recruitment					
Time to fill the posted position(s) to time to hire	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Application completion rate	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Applicant Engagement - click, open, reply	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Interview to Hire rate	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Offer Acceptance Rate	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Source Channel Effectiveness	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Cost Per Hire	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Other:	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Other:	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Retention					
Overall Turnover Rates - Voluntary, Involuntary, New Hire	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Onboarding Completion Rate	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Employee Retention Rate	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Absenteeism rate	<input type="checkbox"/> Yes				



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Metric	Track	"Good Faith" Metric	Tracking Tool Documentation	Facility Goal	Comments Actions Needed
Employee advancement and promotion rate	<input type="checkbox"/> No <input type="checkbox"/> Yes				
Average Employee Tenure	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Compensation Competitiveness	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Exit and Stay Interview Outcomes - Trends	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Employee Satisfaction Survey Scores	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Performance Metrics <u>By</u> and Post-New Retention Strategies Describe:	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Other:	<input type="checkbox"/> Yes <input type="checkbox"/> No				
Other:	<input type="checkbox"/> Yes <input type="checkbox"/> No				



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Engagement - The Final Piece



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Final Thoughts

- Healthcare isn't slowing down
- Access Resources to assist
- Facility Assessment – foundation
- It takes a team
- Develop your plans (R&R)
- Document your efforts
- Embrace change – technology, ideas
- Spread Your Wings!
- Have Fun!!



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Thank You!



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Implement a Team-Based Recruitment and Retention Strategy to Align with the Facility Assessment

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Resources

- Medicare and Medicaid Programs, Minimum Staffing Standards for Long-Term Care Facilities and Medicaid Institutional Payment Transparency Reporting final rule (CMS 3442-F). May 10, 2024. <https://www.federalregister.gov/documents/2024/05/10/2024-08273/medicare-and-medicaid-programs-minimum-staffing-standards-for-long-term-care-facilities-and-medicaid>
- U.S. Bureau of Labor Statistics. Nursing and Residential Care Facilities. Workforce Statistics. <https://www.bls.gov/iag/tgs/iag623.htm>
- Centers for Medicare & Medicaid Services. State Operations Manual, Appendix PP – Guidance to Surveyors for Long Term Care Facilities: https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/som107ap_pp_guidelines_ltcf.pdf
- Executive Order on Increasing Access to High-Quality Care and Supporting Caregivers. April 18, 2023. <https://www.whitehouse.gov/briefing-room/presidential-actions/2023/04/18/executive-order-on-increasing-access-to-high-quality-care-and-supporting-caregivers/>
- PHI Five Pillars of Direct Care Job Quality <https://www.phinational.org/wp-content/uploads/2024/05/PHI-Five-Pillars-Spectrum-Tool-Worksheet.pdf>
- Society for Human Resources Management (SHRM) Retention Toolkit. <https://www.shrm.org/topics-tools/tools/toolkits/managing-employee-retention>

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