

# Determining Workforce Needs

After determining the programs and services the clinic will provide, you must determine the staff configuration necessary to deliver quality services to the projected patient load. Staff may be paid, full or part time, or volunteer.

To help ascertain staffing needs of the clinic, conduct the patient flow exercise designed by ECHO. This exercise helps you determine how, where, and by whom each patient will be served in your clinic.

This exercise should include:

- Both professional and support staff
  - Licensed medical/dental practitioners
  - Nursing staff
  - Lab technicians
  - Pharmaceutical staff
  - Patient educators
  - Social workers
  - Interpreters

Consider adding adding a passage from the book about the importance of interpreters... both Polish and Cambodian examples.

Functions might include:

- Intake and registration
- Triage
- Lab testing
- Social service screening
- Spiritual counseling
- Seeing a healthcare provider
- Pharmacy
- Follow-up services

Determine administrative needs to include:

- Executive Director
- Medical Director
- Other support staff

In addition, a clinic must also consider administrative functions necessary for a nonprofit organization to operate efficiently. These might include:

- Finance
- Fund-raising
- Facility maintenance
- Clerical

Each of these functions will require someone to execute it. Think about the amount of staff necessary to carry out each administrative function. Do your best to balance clinic staffing needs with the limitations you are likely to face when starting your clinic.

Common staffing limitations

- Budget
- Patient demand
- Physical facility
- Record any other expected limitations

If you are staffing one clinic night a week, you must be cognizant of staffing patterns over time to determine staff need. While you can schedule paid staff around your clinic schedule as it expands, volunteers may only be willing to give their time once or twice a month.

A single dedicated volunteer physician can be crucial to a clinic start-up, but cannot be relied on to carry the total burden of patient care for the clinic operation. Other work demands and vacation time are just some of the factors that interfere with scheduling.

Be mindful of specialists

A difficulty clinics may encounter is balancing the actual staffing needs of the clinic with the types of staff resources, particularly volunteers, available and wanting to help. For example, you may have a medical specialist (a podiatrist, for example) wanting to volunteer. If this happens, you may be tempted to broaden your service range to make use of such an individual. While undoubtedly providing a valuable service to your patients, be aware you may have to divert other support resources to incorporate such a service – resources that might better serve your core services.

One way to deal with this situation is determining if the specialist can operate in your clinic as a primary care provider. This requires an assessment of appropriateness for both your clinic and the specialist, a commitment to this model on the part of the specialist, a process of training, mentoring, and oversight by primary care provider and/or medical director. Adhering to your Board-approved credentialing and privileging policies will help you avoid any extra liability concerns when using specialists in a primary care function.

## Paid Staff

A major benchmark in a clinic's development is the hiring of the first paid staff member, be it full or part time. Typically, this individual serves as the Executive Director or chief administrator. This may occur at many points in an organization's evolution, including early in the process, even before opening for service. While this addition represents an inevitable and necessary occurrence as the clinic grows and develops, careful considerations should be made when a clinic adds the first paid staff position.

## First

One of the most crucial factors is having the financial stability to support the salary and benefits of this position. Planning for this position should take into account the necessary funding for multiple years. Having a strong administrator is crucial to the stability and success of a clinic. Approaching this on a year by year basis will not best serve the clinic and will make it difficult to recruit the right candidate for this position.

Availability of a strong and consistent leader is important. While the clinic was developed by a team of leaders, it typically requires a single individual to assume

leadership to move forward effectively. This person will have the responsibility to oversee the overall functioning of the clinic. The selection of this person should be done thoughtfully and carefully, taking into consideration the skills needed to help the clinic fulfill its mission and deliver on the goals of the business and strategic plans. The Board of Directors is responsible for planning, development, and hiring of this individual.

## Second

When the decision has been made to hire your first staff member, it is imperative the position be defined based upon the needs of the clinic. A clear and specific job description that clearly outlines roles, responsibilities, and expectations of this position should be developed prior to employee search.

## Common Pitfall

Do not hire the first staff person based on who is available rather than the needs of the clinic. Because of their commitment and knowledge of the clinic, it may be tempting to hire someone from the Planning Team or one of the Planning Team committees. A classic example of this is a physician who steps forward as the champion of the new clinic, is willing to make a full-time commitment, but requires compensation. While it is possible this might be the perfect person for the job, make sure to carefully consider the skills, talents, and spheres of influence this person will bring to the clinic. What the clinic needs is a chief administrator, while physician strengths are in patient care and volunteer recruitment. It will be tempting to start with the person who is available, but unless this individual is correct for the role needed, it is not the best use of resources.

Clinics may be tempted to appoint a full-time volunteer to fill this position. While this may be possible, finding a person to make such a commitment without compensation may be an insurmountable challenge. Paid staff may be the only option.