



Toolkit

**Leading Top Clinical Teams: The 2025
OPEN MINDS Executive Seminar On
Optimizing Clinical Performance With The
Right Metrics**



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Leading Top Clinical Teams: Optimizing Clinical Performance With The Right Metrics: Seminar Toolkit



Monica E. Oss, Chief Executive Officer, *OPEN MINDS*

Thank you for downloading The *OPEN MINDS* Seminar Toolkit, a supplemental guide to Leading Top Clinical Teams: The 2025 *OPEN MINDS* Executive Seminar On Optimizing Clinical Performance With The Right Metrics, a signature part of The 2025 *OPEN MINDS* Service Excellence Institute.

Building and retaining strong clinical teams is essential to meeting the growing demand for services, yet workforce challenges remain a top concern for nearly all provider organizations. This toolkit was created as a supplementary guide to the Clinical Talent Management Best Practices Seminar featured on August 12, 2025, at The 2025 *OPEN MINDS* Service Excellence Institute, and contains a variety of resources to help deepen talent management expertise and introduce innovative workforce development approaches that reflect current market trends.

Then on August 12, 2025, join industry experts Sharon Hicks, MSW, MBA, Senior Associate and Kim Bond, MS, LMFT, Executive Vice President, at *OPEN MINDS* for the live seminar in Long Beach. This engaging session will explore evolving compensation models, enhanced benefits strategies, and forward-thinking recruitment techniques tailored specifically to the health care workforce.

I hope you will take advantage of all the toolkit and seminar has to offer. Feel free to reach out to kbond@openminds.com or shicks@openminds.com for specialized advice on your organization's talent strategy.

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Borrowing New Approaches For Workforce Strategy

By Monica E. Oss, Chief Executive Officer

For organizations serving consumers with intellectual and developmental disabilities (I/DD), the workforce crisis remains a persistent challenge. In the recent report from the American Network of Community Options and Resources (ANCOR), [The State Of America's Direct Support Workforce Crisis 2023](#), 95% of responding organizations experienced moderate or severe staffing shortages in the past year. And over three-fourths of those organizations reported turning away new referrals due to ongoing staffing shortages.

How are organizations serving consumers with I/DD addressing the strategic challenges posed by workforce shortages? We had the opportunity to hear from two organizations, Redwood Family Care Network and Merakey, at our last Management Best Practices Institute during The 2023 *OPEN MINDS* I/DD Executive Summit in the session [Addressing Workforce Issues In I/DD Service Delivery](#). The presenters provided us with some recommendations to strengthen the workforce and improve service delivery for individuals with disabilities.

Virginia Gabby, Executive Director from Merakey, outlined how they applied case

management principles to the recruitment process that emphasized relationship building and candidate engagement. Case management for their consumers involves assessing, planning, coordinating, monitoring, and evaluating options and services to meet an individual's needs. By applying this same approach to the hiring process, Merakey saw a decrease in replacement positions and experienced growth in new positions during their pilot program. Ms. Gabby said, "We built those relationships with the candidates. We sent them information, emails, and told them of upcoming events. And the feedback we received was really positive."

Michelle Menez, chief operating officer for Redwood Family Care Network, presented their strategy for reducing the number of steps in their recruitment cycle...

Previously Published – Executive Briefing, March 19, 2024 — openminds.com/market-intelligence/executive-briefings/borrowing-new-approaches-for-workforce-strategy/

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Implementing Workforce Strategies That Drive Financial Strength

Facilitator: Ken Carr, Senior Associate

The health and human services workforce has changed significantly in the last two years – a new competition for licensed and unlicensed staff, rising wage rates that will not return to previous levels, and the need for new technology skills. There are strategies for building the workforce needed moving forward, but how do you assess the financial feasibility of those strategies for your organization? This session will focus on helping finance leaders:

- Assess the financial impact of different workforce strategies
- Model revenue enhancement opportunities through incentive compensation, utilization goals, and remote service delivery
- Reduce overall costs through provider specialization and implementation of technology that extends the impact of providers

Featured speakers:

- Dana Royse, MBA, Chief Financial Officer, New Vista
- Ken Carr, Senior Associate, *OPEN MINDS*

Previously Published – On-Demand Presentation, September 16, 2023 — openminds.com/market-intelligence/resources/implementing-workforce-strategies-that-drive-financial-strength/

View & Listen

How To Overcome Workforce Shortages: Five Strategies For Staff Recruitment & Retention

By Joe Naughton-Travers, Ed.M., Senior Associate & Executive Editor, Management Newsletter

To stay competitive in the fight for a limited health and human service workforce provider organization executive teams must consider incorporating talent management and related strategies into their organizational strategic plan. This means actively implementing a comprehensive approach to recruit, develop, and retain high-performing employees within an organization.

I recommend five strategies to tackle the challenges of staff recruitment and retention. Each strategy presents distinct advantages. But together they create a unified talent

management approach that ensures your organization has the right staff with the right skills for long-term sustainability and success...

Previously Published – Newsletter Article, January 10, 2025 — openminds.com/market-intelligence/editorials/how-to-overcome-workforce-shortages-five-strategies-for-staff-recruitment-retention/

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How To Tackle Staff Recruitment & Retention

Strategy #1



Establish externships, internships, and residency programs

Strategy #2



Offer competitive salaries and benefits for your high performing service lines

Strategy #3



Provide attractive staff training and development opportunities

Strategy #4



Cultivate a true employer of choice reputation

Strategy #5



Leverage technology in staffing solutions

The Four Keys To Becoming An Employer Of Choice

By Joe Naughton-Travers, Ed.M., Senior Associate & Executive Editor, Management Newsletter

An employer of choice is a company people really want to work for. An employer of choice is always the top choice for employment among talented individuals in a particular industry because of its status and reputation. It is known for its high-quality work products, high-profile management staff, and high employee satisfaction. To become an employer of choice, our team at *OPEN MINDS* recommends focusing on four best practices:

1. Assessing the landscape and knowing what's important to each of your target employee groups

2. Building a strong brand
3. Fostering a culture of trust and engagement
4. Providing opportunities and resources for meaningful work...

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Four Keys To Becoming An Employer Of Choice

 OPEN MINDS

1.

Know Your Workforce Audience

2.

Build A Brand That Matters

3.

Culture Is Key

4.

Identify & Build On Meaningful Work

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Staff Retention, Career Advancement & Employee Passion: The Devereux Advanced Behavioral Health Case Study

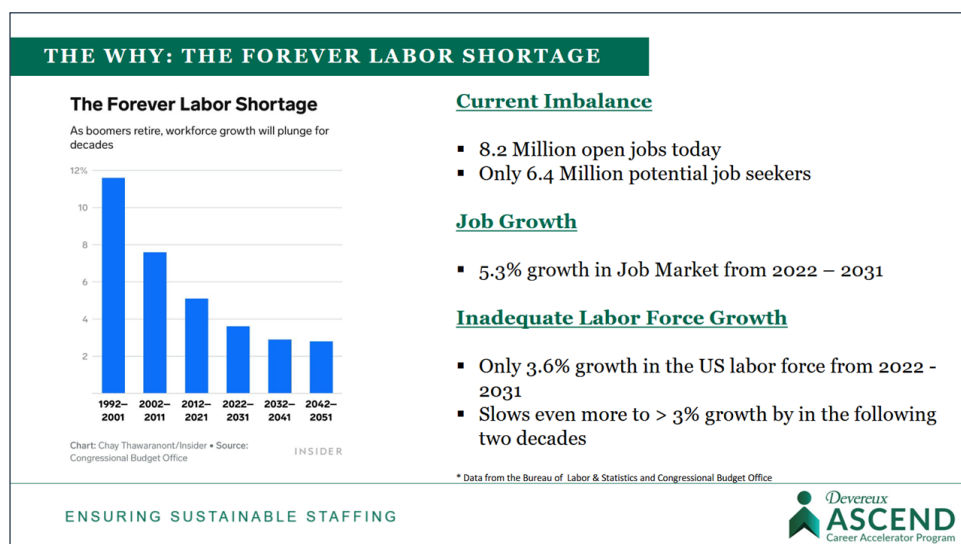
By Joe Naughton-Travers, Ed.M., Senior Associate & Executive Editor, Management Newsletter

Workforce challenges faced by specialty provider organizations—employee shortages, burnout, staffing costs, and workflow issues—are all too common in the health and human services industry. The potential solutions are many: investments in integrated care, peer support workers, technology, and telehealth. But the fundamental issue is that organizations do not have enough employees, they cannot retain the employees they have, and some employees may not have the skills needed to move up the ladder. Therefore, it is imperative

that organizations also invest in professional development...

Previously Published – Newsletter Article, January 10, 2025 — openminds.com/market-intelligence/editorials/staff-retention-career-advancement-employee-passion-the-devereux-advanced-behavioral-health-case-study/

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The Pay Issue

By Monica E. Oss, Chief Executive Officer

I was just on a call with a colleague who is the administrator for a Southern mental health clinic. She said the psychiatrists in her market refused to return to the office to see consumers in person. Their response to the request to return to the office—“we’re not coming...we have lots of other opportunities to continue to work virtually—for higher wages...” This vignette illustrates the challenges in managing a clinical workforce these days. (For more, see The Clinical Talent Gap and A Formula For Retention).

The easy answer to this workforce situation would be to just pay more—raising the base

compensation rates for clinical team members. But that isn’t always possible. Provider organization executive teams are caught in a margin squeeze. Reimbursement rates have not kept pace with inflation—particularly the inflation in wage rates in recent years...

Previously Published – Executive Briefing, December 6, 2023 — openminds.com/market-intelligence/executive-briefings/the-pay-issue/

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Factors In Performance-Based Compensation Calculus

“Cost of Recruitment” vs “Cost of Vacancies” When Determining Performance Pay

- Cost of Lost Revenue
- Longer Client Wait Times, Impact on Other Outcome Measures
- Reduced Productivity & More Late Notes as Vacancies increase ... impact on the Revenue Cycle

Important Other Considerations – Organizational Realignment

- Moving Away from Cost-Based Reimbursement Models to VBR, Case Rates, Capitated Payments - In other Words Diversifying Your Payer Mix – Helps to create net margins for use in pay, performance pay, infrastructure investment
- Financial Sustainability & Payer Diversification to support flexibility in paying for performance

Identifying Potential Managers & Providing Professional Development Opportunities

- Internal courses for new managers
- OPEN MINDS Leadership & Management Certificate Program

The Workforce Priority

By Monica E. Oss, Chief Executive Officer

The health care workforce is not a monolith. From direct care workers to physician specialists, there are unique skillsets required and equally unique challenges to recruiting and retention. What is the same across the entire workforce spectrum is the shortage of qualified clinicians.

At the federal and state levels, there are a variety of initiatives to increase the workforce supply. Recent federal initiatives include the Healthcare Workforce Resilience Act which will

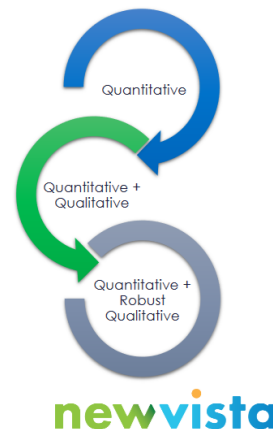
allow more foreign health care worker to enter the country (see [AHA, National Groups Support Healthcare Workforce Resilience Act](#))...

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Compensation Enhancement Through Incentives

- Incentive Compensation Development
 - Quantitative
 - Develop metrics
 - Clear communication on how to achieve
 - Transparent reporting
 - Prompt payment monthly
 - Quantitative + Qualitative
 - Above plus a comprehensive review of sample charts for completeness, accuracy and timeliness
 - Quantitative + Robust Qualitative
 - Added more qualitative components
 - Scaled back payment to quarterly



The Workforce Seesaw

By Monica E. Oss, Chief Executive Officer

This past weekend, I learned another new workforce management term—“funemployment”—taking time off between jobs to enjoy life and go on vacation after being laid off. Since 2020, there have been quite a few new workforce terms added to my lexicon—quiet quitting, quiet firing, bare minimum Monday, backdoor layoffs, and career cushioning to name a few.

For most managers, keeping up with the changing preferences and practices of the workforce is a challenge with real consequences. Many provider organizations continue to see decreased revenues (and margins) due to programs that have closed and

programs operating at reduced capacity—due to lack of staffing.

What are the “best practices” in this new world of talent management?...

Previously Published – Executive Briefing, May 25, 2023 — openminds.com/market-intelligence/executive-briefings/the-workforce-seesaw/

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Example of HR Data

Example of HR Data

Emergency Health Network El Paso Center for Mental Health/Intellectual Disabilities

HR Scorecard								FY23 November					
Division/Department	Filled Positions	Open Positions	Total Positions	Filled FTE	Open FTE	Total FTE	% Filled	Time-to-Fill (days)	Separations /	(Active EEs)	Measured Period New Hires	Turnover (TO) Rate	Retention Rate
ADD - Addiction Services	8	1	9	8.00	1.00	9.00	89%	10	8	1	0.0%	100.0%	
ADM - Administration	65	6	71	65.00	6.00	71.00	92%	60	66	2	0.0%	100.0%	
CCA - Collaborative Care	10	1	11	10.00	1.00	11.00	91%	2	10	0.0%	100.0%		
CEIS - Crisis and Emergency Services	111	13	124	109.80	13.20	123.00	90%	111	3	109	5	2.9%	97.1%
COM - Compliance	7	1	8	7.00	1.00	8.00	88%	1	7	0.0%	100.0%		
DEV - Development	3	0	3	3.00	0.00	3.00	100%	2	3	0.0%	100.0%		
DIV - Diversion Services	102	20	122	100.25	21.75	122.00	84%	99	2	103	4	2.0%	98.0%
ENT - Enterprise	1	0	1	1.00	0.00	1.00	100%	-	1	0.0%	100.0%		
FIN - Finance	45	5	50	45.00	5.00	50.00	90%	23	45	1	0.0%	100.0%	
Disabilities	98	6	104	97.10	4.50	101.60	94%	99	1	95	5	1.1%	98.9%
IT - Information Technology	5	0	5	5.00	0.00	5.00	100%	2	5	0.0%	100.0%		
MED - Medical	17	5	22	16.20	4.70	20.90	77%	8	19	0.0%	100.0%		
MHI - Mental Health	217	28	245	214.26	28.90	243.16	89%	275	3	218	2	1.4%	98.6%
NUR - Nursing	7	2	9	7.00	2.00	9.00	78%	9	7	0.0%	100.0%		
Average(s)	696	88	784	688.61	89.05	777.66	90%	54	9	696	20	0.5%	99.5%
as EHR Career Site Actual													

*Career site only shows the 40 career opportunities / there are another 58 positions which are linked to a group of those (Ex. Caseworkers holds 1/2 dozen openings, etc.)

Using AI To Find The Talent

By Monica E. Oss, Chief Executive Officer

One small step.... One Giant Leap! Fifty-five years ago, in 1969, amazed by the grainy black and white footage, 600 million people witnessed a historic moment as we put a man on the moon live on television. This was the era before personal computers in your pocket, electric vehicles, and virtual reality headsets were even a thought (see [Using VR To Create An Immersive Mental Health Support System](#)).

Role forward to today and NASA is using AI to navigate the uncertain and complex lunar environment ([How NASA's VIPER Rover Could Revolutionize Moon Exploration With](#)

[AI Mission](#)). And the Russians are using AI to question the authenticity of the Apollo 11's photographic evidence of history ([AI Analysis In Russia Says US Moon Landing Images Are Fake](#))...

Previously Published – Executive Briefing, March 5, 2024 — openminds.com/market-intelligence/executive-briefings/using-ai-to-find-the-talent/

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Performance-Based Compensation Above Market Rates

By Joe Naughton-Travers, Ed.M., Senior Associate & Executive Editor, Management Newsletter

Therapist and social worker compensation is not great (see Occupational Outlook Handbook). In large part, the pay problem is caused by lower reimbursement rates from insurance companies and linked to a shortage of qualified mental health workers—making recruitment and retention a big (and reoccurring) challenge facing health and human services executives.

One way to pay more without raising wage rates is to create performance-based compensation

models for team members...

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Four-Step Approach To Designing A Performance-Based Compensation Plan



Define
Your Goals



Design Your
Compensation
Model & Rates



Support
Employees In
Meeting
Performance
Goals



Track & Share
Performance
Outcomes