

# Keeping The Best!

## Maximizing Your Retention Efforts



**DEPARTMENT OF  
HEALTH**

*Edward G. Rendell, Governor*

**PEHSC**  
Pennsylvania Emergency Health Services Council

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Dear EMS Service:

This is the third workbook in the Keeping the Best series entitled “Maximizing Your Retention Efforts”, which targets growing volunteer agencies integrating career personnel. Every EMS agency knows that recruiting volunteer and career providers is a challenge and studies have shown that addressing Retention efforts is a way to avoid that challenge altogether.

This project is a cooperative effort in Recruitment and Retention between the Virginia Office of Emergency Medical Services, the Pennsylvania Emergency Health Services Council and the Pennsylvania Department of Health, Bureau of EMS.

This workbook is for organizations that have mastered the basics of retention and want to maximize their retention efforts. While it will focus on the needs of larger agencies with more complex organizations, the insights gained can be used by any leader interested in performing at a higher level of effectiveness.

The purpose of this workbook is to guide leaders through retention problems driven by growth and change. The major theme throughout, is that the changes we have experienced in EMS to date are small compared to the changes expected in the future. Those agencies that prepare for these changes now are less likely to experience the disabling impact of “future shock”.

Keeping our EMS providers is critical today and will become even more vital as the demand for our services increases along with the growing population we serve.

Sincerely,

Joseph Schmider  
Director, Bureau of Emergency Medical Services  
Pennsylvania Department of Health

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## Introduction

In the past you may have thought of member retention as a problem to be solved. Someone leaves your agency creating a hole to be filled. You focus time and attention on the problem, it is solved and you move on to the next problem. However, over time the organization grows in size to satisfy the needs of the community for your services. And what was an isolated retention problem is now a continuous series of retention problems that can become a traffic jam, hamstringing your ability to provide service and frustrating your members. Upon closer inspection, you may find that the growth in retention problems are directly related to your past growth and success. While going back to the “good old days” may be preferred to your current reality, your job is to move your organization into an often unknown, and unclear future. The purpose of this workbook is to help leaders through the retention problems caused by growth and change.

### **Is Bigger Better?**

For most EMS agencies, growing is often a painful experience. Not only are there more things to do and more members to direct, but also the actions you take to solve one problem now seem to have unwanted effects in other areas. For example, as you grow you may have added more stations. The goal was to provide better service and to have stations in place to back-up each other up an emergency. But with more locations, more time is required to keep everyone informed. You also discover that the stations have just enough differences in their operating style that the back up is not always effective. These unwanted effects are the direct result of the increasing complexity in your organization, and the leaders who succeed are those who learn how to deal with this complexity.

### **The Importance of a Process Focus**

Successful leaders have learned the secret of the snake. In order for the snake to grow, it must shed its skin. And the skin in this metaphor is the web of processes used by your organization to perform its work. When the organization outgrows its processes, they must be changed or the growth will likely be stunted, distorted or come at an increasingly higher price.

The workbook will introduce three major processes:

- **The Change Process** – We have titled this section “The Crisis of Change” because we have learned that it often takes a crisis like 9/11 to galvanize change. Once we have members ready to change, we need a process to move them from resistance through compliance to commitment to the change. Most change efforts fail because leaders do not recognize the necessary steps in the change process.

We are also going to look at a special application of the change process related to the integration of volunteer and career staff. We address this issue in the section, “Making the Marriage Work.”

- **The Recruiting Process** – You may wonder why we have added a section on recruiting in a workbook on retention. This is because most EMS leaders think of recruiting and retention as being tied together and we want to explore this relationship in more depth. The recruiting process can be viewed as a “pipeline” of applicants moving towards affiliation with your agency. While most agencies think the pipeline should be filled only when there are openings, the smart organization keeps it full all the time.
- **The Retention Process** – This section builds on the retention principles presented in the first workbook, “*How to Use EMS Retention Principles.*” These principles are:
  - **The Life-Cycle Principle** – Members stay longer when leaders take specific actions at specific points in the retention life cycle.
  - **The Belonging Principle** – Members stay longer when they feel welcome, needed and respected.
  - **The Success Principle** – Members stay longer when they achieve success in important personal goals.
  - **The Friends & Family Principle** – Members stay longer when they develop strong personal relationships within the squad.

This section deals with how these principles can be made more effective through integration into a series of linked programs.

The workbook will also lead you through the construction of a basic retention process that you will customize for your own use.

At the end of the day, we want to help you keep good people longer. Good people are worth the effort.

## Let's Get Started

### Who Should Use This Workbook?

This workbook is designed for EMS leaders who want to improve their retention efforts. We see two types of leaders who could benefit from this workbook. Check the box that best describes you.

**Leaders with Growing, Complex Organizations** – These leaders have mastered the basics of retention. They have programs in place to address retention and have assigned members to run these programs. They see recruiting and retention as a key strategy to maintaining high levels of service and now want to maximize their retention efforts.

**Leaders with Growing Organizations in Transition** – These leaders are proficient in solving retention problems as they come up. However, the number of retention problems is mounting and “working harder” on the problems does not seem to be paying off. They are looking for new ways to address more complex retention problems.

### How To Use The Workbook

The workbook is designed to be your own personal notebook. Write in it. Underline ideas you find useful. Make notes for yourself. Space has been provided for writing responses to questions and for completing exercises. We want you to engage in a dialogue with the material so you can learn faster. The material will be presented in a straightforward pattern.

- **Learn** – We will start with your past experiences, present new information and focus on current problems.
- **Practice** – Most people only improve if they practice what they have learned. The workbook will give you lots of opportunity to practice new skills.
- **Critique** – The workbook will also give you feedback in the form of self-tests, performance standards and options others have used to improve retention.

Our hope is that you will come away with one or two good ideas that really work well for you and make a difference.

## Why is it Important to do Something About Retention Now?

Research<sup>1</sup> indicates that there are three major reasons for action now.

1. **The Demand for EMS Personnel Will Continue to Grow** – This growth is driven by Pennsylvania’s projected overall population growth of 10% from 2005 to 2020. And residents age 65 and older are projected to grow at 25% during the same time period. The implication is that your response volumes are going to increase.
2. **There is Less Time Available to Volunteer** – 44.7% of those who volunteered in the U.S. in the past listed “lack of time” as the reason for not volunteering in 2003. The implication is that time to serve, which has always been a problem, is going to get worse.
3. **There is Increased Competition for Available Volunteers** – A 2003 Bureau of Labor Statistics News release indicated that 74% of the available volunteers spent their time with religious, educational/youth and social/community service organizations with only 8.2% working with hospitals or other health organizations. The implication is that competition for volunteers is going to get more intense.

For more information on these trends, see *How To Use EMS Retention Principles*, in the ***Keeping the Best*** series.

## What is a Process Focus?

To begin, a process is a series of actions taken in sequence that produce a consistent, desired result. We use processes all the time without much thought. For example, we follow a process to get up in the morning and to get ready for the day. We use processes to start and drive a car. And if you watch FoodTV, you learn a process called a recipe from professional chefs. One of the things that differentiate professionals from amateurs is their consistent use of processes.

Let’s look at a retention example. Most of you have a new member orientation process. A well-designed new member orientation process takes uninitiated, “green” rookies and integrates them into a professional organization. Since this transition is not immediate, the rookie must go through a series of steps that usually includes:

- Learning how to wear the uniform
- Learning the special language of the profession
- Learning the organization’s culture (how we get things done)
- Being introduced to and developing relationships with current members
- Learning basic emergency and life saving skills

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<sup>1</sup> Virginia Office of Emergency Medical Service



## The Crisis of Change

Imagine standing on a beach watching the water slowly receding out to sea. Unless you experienced this before, you might think it was an unusual but not a dangerous situation. What we now know is that this is one sign of an approaching tsunami. Sometimes change is like a tsunami in your organization. It creates an unexpected crisis that focuses everyone's attention.

Now imagine that you are in the early 1980s and hear that people are dying of a strange new disease in Africa. You have special knowledge that this is the start of the AIDS epidemic. How successful do you think you would have been in changing the behavior of individuals in a high-risk group to keep them from getting AIDS?



Unfortunately, we know the answer to that question. It took these groups a long time to accept the seriousness of the problem. While its beginnings were modest, AIDS was a much more serious threat to life than any tsunami.

The AIDS epidemic is also a better example of the kind of change that is experienced in problems with retention. It starts slowly and builds over time. Members slowly walk out the door while our attention is distracted by other problems. It is the slow spreading, low visibility change that can overwhelm an organization. It also allows members to remain in psychological denial about the ultimate impact of the change, and this is why implementing change can be difficult but not impossible.

For our purposes the change process involves successfully moving members through three stages.

1. **Resistance** – This is the first stage when members discover they must change and either actively or passively resist. Members at this stage have not physically, intellectually or emotionally made the change.
2. **Compliance** – This is the second stage when members realize they cannot go back to the old way of doing things, but do not have confidence in themselves to master the change and do not see the positive impact of the change. Members

have physically made the change, and intellectually understand the reasons for the change but have not adjusted emotionally to it.

3. **Commitment** – This is the last stage when a critical mass of members become committed to the change and infects others with their optimism. Members at this stage have made the change physically, intellectually and emotionally.

Take a minute to better understand your personal reaction to a major change. Think of a major change you have recently experienced in your organization. How did you react initially? Are you more likely to resist change or are you more likely to accept and go along with the change?

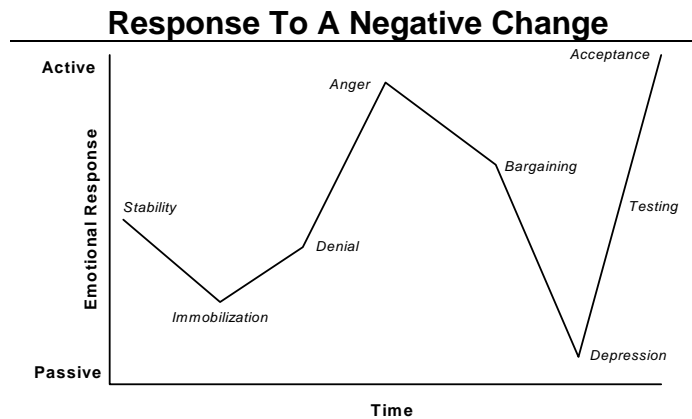
### Getting Beyond Resistance

The general rule is that you will always get resistance to any major change whether this change is initially perceived as negative or positive. Targets, those members who will actually have to change, will respond in predictable ways over time. You cannot stop members from going through these responses. Your role as a change agent is to move them through as quickly as possible and not let them get stuck in any one phase.

- **Response to a Negative Change**

- **Immobilization** - Often a member's initial reaction to a major change is shock. He/she may act confused about what they should say or do.
- **Denial** – The next predictable reaction is denial where the member ignores the change or its consequences, and he/she may act like nothing has happened.
- **Anger** – When the change can no longer be ignored, the member responds with anger based on feelings of frustration and hurt.
- **Bargaining** – At this point the member is beginning to feel the inevitability of the change and seeks to minimize the impact of the change. This phase signals the beginning of acceptance of the change.
- **Depression** – As the full reality of the change becomes clear, the member may see the situation as beyond their control and become depressed and display a lack of energy or interest.

- **Testing** – As the member sees ways that he/she can regain control of their environment, he/she will begin to test out ways of coping with the new reality.
- **Acceptance** – Finally the member accepts the change. This does not mean, however, that he/she likes the change.



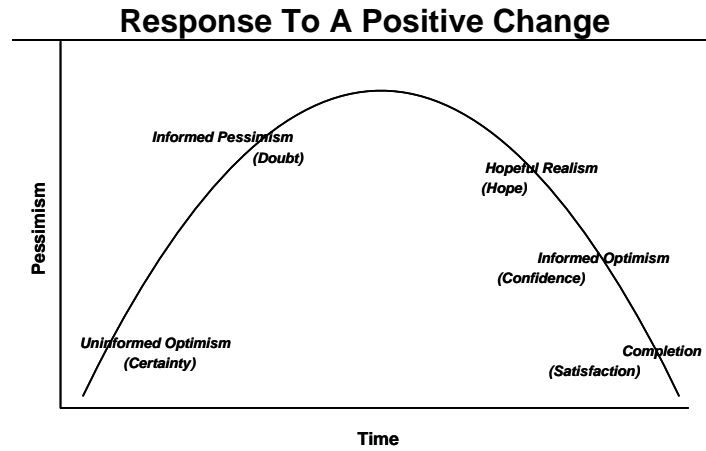
**Graphic from Daryl R. Connor, *Managing At The Speed Of Change*.**

**Note:** It should be noted that the perceived amount of change or the frequency of change a member may experience will impact amount of time it may take to gain acceptance of the change(s). Major upheaval may cause some members to repeat some of the emotional responses such as the anger and denial thereby lengthening the acceptance process. As a leader, it is your role to manage unnecessary or major changes so members are not forced to accept numerous changes all at once.

▪ **Response to a Positive Change**

- **Uninformed Optimism** – In this phase the members have high expectations for the change that are not based on facts.
- **Informed Pessimism** – As the reality of the change becomes clearer, the members have some second thoughts and doubt about the change. The change may be rejected at this phase if the targets are not prepared for this predictable reaction.
- **Hopeful Realism** – As the expected positive outcomes of the change emerge, the member’s concern begins to decline. He/she now sees “light at the end of the tunnel.”
- **Informed Optimism** – A member’s confidence grows as the facts of the situation point to a positive outcome. He/she’s initial expectations are now being met.

- **Completion** – In this final phase, the member realizes that even a positive change brings disruption and that there is “no free lunch.”



**Graphic from Daryl R. Connor, *Managing At The Speed Of Change*.**

Take a moment to reflect on a recent change in your EMS agency that didn't go as well as you had hoped. Did the reaction to the change follow these predictable patterns? What surprised you most about members' reactions?

## Implementing Change Target Groups

In implementing any change, you will be spending most of your time with three target groups.

- ❑ **Early Adapters** – Members who are positive about the change and are willing to give it a try. About 20% of your members should be in this category. You should be spending the majority of your time with this group. They are the ones most likely to devote time and energy to the change. They are also the ones most likely to suffer negative reactions to a positive change.
- ❑ **Fence Sitters** – Members who can go either way and are influenced by the early adapters and the true resisters. About 50% of your members should be in this group. After the early adapters, you should be spending the remainder of time with this group.
- ❑ **True Resisters** – Members who honestly believe the change is a bad idea and will actively or passively resist it. About 30% of your members will be in this group. You should be spending almost no time with this group.

As you read the descriptions of the three target groups, did specific members come to mind? Make a short list of your early adapters, fence sitters and true resisters. About what percentage of each group do you normally have with major change? Where would you put yourself in these groupings?

Early Adapter

Percent of the squad

\_\_\_\_\_

Fence Sitters

Percent of the squad

\_\_\_\_\_

True Resisters

Percent of the squad

\_\_\_\_\_

## Implementing Change Action Steps

Once you have identified the target groups, your role is to move them from resistance through compliance to commitment. Use the following steps to keep the change on track.

1. Present the current situation requiring the change. Make clear the danger in not changing now. Site examples of others who did not change in similar situations.
2. Present an optimistic but realistic picture of the future after the change.
3. Identify clearly what will change and what will not change. Reduce, as much as possible, the anxiety generated by the unknown.
4. Be willing to meet privately with members to discuss how the change will personally affect them. Deal with the “me” issues early.
5. Start the implementation quickly and stay on schedule. Avoid slowing down.
6. Make it safe and easy for people to open up and question the change. Keep resistance out in the open. Don't force it underground where you cannot deal with it.
7. Allow a reasonable number of members to be involved in planning and implementing the changes that affect them. This helps restore some sense of self-control.
8. Promise problems and casualties. Let members know the good and bad news.
9. Get results early. Work first on areas where you expect an easy success that will build members' confidence in the change.

Review the suggested action steps. Put a star next to those that you have used in the past and that have worked for you. Put a question mark next to those that you do not have experience with but think might be useful.

How might you try out these new, potentially useful action steps?

## **Implementing Change Exercise**

The exercise on the following pages is designed to let you plan and practice implementing change. You will be asked to plan a change and anticipate the barriers to the change.

### **Step #1: Be Clear About the Desired Outcomes**

Think of a major change that your organization will be faced in the near future. Briefly describe the change initiative in two or three sentences. What is the current situation, and what is the desired outcome of the change initiative? Be as specific as possible.

**Current Situation:**

**Desired Outcome:**

If you are having trouble being specific about the desired outcome of the change, this is one of the warning signs that the change initiative is headed for trouble. Be sure that you “begin with the end in mind.”

**Step #2: Assess The Level of Disruption**

What is the level of member disruption expected in implementing this change? Please complete the following survey. Answer questions from the member’s perceived point of view.

<b>Disruptive Factors</b>	<b>Level of Disruption</b>
1. How many changes will the members need to make in the way they do their work?	High Medium Low
2. How difficult will it be for members to accurately predict the impact of the change on them?	High Medium Low
3. How difficult will it be for members to gain the skills and knowledge necessary for the change?	High Medium Low
4. How many of the members’ personal relationships must be altered for the change to be successful?	High Medium Low
5. How many of the members’ beliefs, behaviors, and assumptions about the agency must be altered for the change to be successful?	High Medium Low

High disruption can cause high resistance to the change.

**Step #3: Assess the Consistency of the Change with the Current Culture**

Are the goals and end results of this initiative consistent with the current organizational culture?

List one or two goals or results that are consistent with the current culture and the characteristics of the culture it supports. For example, if the agency has a culture of teamwork, and the change will improve teamwork, then the change is consistent with the culture. If the culture encourages decision-making by members and the change will improve member decision-making, then the change is consistent with the culture.

<b>Change Initiative Goals or Results</b>	<b>Supportive Culture Characteristics</b>

List one or two goals or results that are inconsistent with the current culture and the characteristics of the culture it does not support. For example, if the agency has a culture that supports cliques, and the change requires involvement of all members, then the change will be inconsistent with the culture. If the culture does not value creativity, innovation or risk and the change requires creativity and innovation, then the change will be inconsistent with the culture.

Change Initiative Goals or Results	Unsupportive Culture Characteristics

**Step #4: Analyze the Risk Associated with the Change**

Based on your analysis, what is the potential level of risk for the implementation?

Level of Risk
<p><b>High Risk</b> – The desired outcome of the change is not well defined or understood. The goals and objectives of the change are inconsistent with the current culture. There will be a high level of member disruption well above the normal level experienced in past changes.</p>
<p><b>Moderate Risk</b> – The desired outcome of the change is reasonably well defined and understood. The goals and objectives of the change are somewhat consistent with the current culture. The level of disruption will exceed the normal level experienced in past changes.</p>
<p><b>Low Risk</b> – The desired outcome of the change is well defined and understood. The goals and objectives of the change are generally consistent with the current culture. There will be a normal level of disruption that targets have assimilated in the past.</p>

As you can see, the important prerequisites for successful change are:

- A well defined and understood desired outcome of the change.
- Change goals and objectives that are reasonably consistent with the current culture.
- A level of member disruption that does not exceed past experiences.

High risk changes should be avoided unless there is no choice but to go ahead.

### Step #5: Assess Readiness for Change

There are two other issues you also need to assess: the readiness for change of the leaders and the members.

#### Leadership Readiness

How committed are the leaders to this initiative? Please complete the following survey.

<b>Actions of Leaders as Sponsors of Change</b>	<b>Low High</b>
1. How unhappy are the leaders with the current situation?	1 2 3 4 5 6
2. What is the level of understanding by the leaders of the amount of disruption created by the change?	1 2 3 4 5 6
3. What is the level of organizational power and influence that the leaders have to implement the change?	1 2 3 4 5 6
4. What is the level of willingness the leaders have to publicly and privately convey strong support for the change?	1 2 3 4 5 6
5. What is the level of willingness the leaders have to use positive and negative consequences to support the change?	1 2 3 4 5 6
6. What is the level of willingness the leaders have to change their behavior to be consistent with the goals of the change?	1 2 3 4 5 6

Leaders must be on-board with the change for it to be successful. Getting leaders on-board is a one-on-one exercise. This must be done first before the change is implemented. The other leaders in your organization must be convinced about your commitment to the change before they will join up. And like other members, you have to address how the change will affect them.

How can the leaders' commitment to the change be strengthened?
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## Member Readiness

Who are the critical targets of this change (list individuals or groups)?

What is the level of the members' readiness for change? Please complete the following survey.

	Readiness for Change		
	High	Medium	Low
1. Have the members been introduced to change principles and practices?	Yes	Somewhat	No
2. How often have the members experienced successful change in the past?	Often	Sometimes	Never
3. How many major changes are currently in progress or have recently been completed?	Fewer than Normal	About Normal	More than Normal
4. In the past, have members been rewarded or punished for attempting to make changes?	Rewarded	Inconsistently Applied	Punished

Low member readiness for change can make the change take longer than necessary. Helping members understand the change process often improves their readiness for the change. Acknowledging and honoring the legacy of past successes also helps members move more confidently into the future.

What steps can be taken to improve the members' readiness for change?

### Step #6: Change Implementation Resistance Phase

How will resistance to this initiative be expressed? Overt resistance is when the member speaks out against the change or openly refuses to change their behavior. Covert resistance is when the member tries to undermine the change by spreading false information or by privately pointing out all the negative consequences of the change (real or imagined) to those who are undecided.

How will overt resistance be expressed?	How will covert resistance be expressed?

What specific action steps will be used to surface and dissipate resistance?

## Step #7: Change Implementation Compliance Phase

In this step, you want to take action to move members towards compliance. The goal of this step is to have members actually try out the behaviors associated with the change. Most actions in this step revolve around making sure members:

- **Understand why the change is necessary** – Continue to explain the reasons for the change until everyone is tired of hearing it. It will take time for members to understand the change because they may have an “I’ll see it, when I believe it” mind set.
- **Have the skills and knowledge to perform the new behaviors** – Focus on building skills required for the change. Give them a chance to practice new skills.
- **Receive coaching to gain confidence** – In your role as coach, spend time “catching people doing something right.” Encourage movement towards the change by:
  - ✓ Give feedback to any positive movement towards the change
  - ✓ Tell them what they did right. Be specific as possible.
  - ✓ Tell them why it is important – Connect the good behavior to the success of the change.
  - ✓ Thank them and ask them to keep doing it.

What action steps will be used to move members towards compliance?

## **Step #8: Change Implementation Commitment Phase**

Commitment to the change is the last phase in the process. Commitment means that the member understands the importance of the change, has physically changed their behavior and emotionally accepts the change. For the change to succeed you will need a critical mass of members committed to the change.

The first group to work on is the early adapters. Because they are positive about the change from the start, they need to be coached through the inevitable disappointments they will feel as they experience “informed pessimism.” Promise problems and casualties. Let these members know the good and bad news quickly. Involve them in the planning and implementation of the change.

Work with the fence sitters next. Make sure they know how the change will impact them. Help them identify the barriers to the change and involve them in either eliminating the barriers or reducing their impact. Place members of this group with early adapters to help them along. Allow members to ventilate their fears, concerns and grief. Treat these feeling as legitimate.

Don't expect true resisters to become committed to the change, but don't allow them to keep others from taking the step. Apply positive and negative consequences to this group. Reward movement towards the change and punish attempts to block the change.

What action steps will be used to move members towards commitment?

## Making the Marriage Work – Volunteer And Career

How can we account for the level of emotion this change has generated? To many, it doesn't seem right to pay people to give back to their community. The perception is that this may be the beginning of a power grab by fire departments and public officials to take over EMS for their own purposes. If not handled properly, the integration of career and volunteers EMS personnel can create distrust, turf issues and lingering problems.



Another way to look at this change is that it signals a fundamental structural change in EMS work. This change is driven by increasing demands for services at a time when volunteers are getting harder to find and keep. The signs have been there for some time, but like most evolving change events, they went unnoticed or were discounted in importance until they reach a crisis. The challenge for leaders now is to make the marriage work.

And to make this work, leaders have to treat it as a major change event that also includes changing the organization's culture over time. This is no small order. If the change implementation is too slow or too weak, the current culture will repulse the change. If the change implementation is too disruptive, the collateral damage can be high, and people may rationalize, "We had to destroy the agency to save it."

We have found that this marriage has made members more sensitive about labels. For example, volunteers feel they are as professional as those paid to do the same job. Paid professionals may not always agree with this and can adopt a condescending attitude that only makes matters worse. For the purposes of our discussion, we will refer to volunteers as "volunteer professionals." When we refer to those who are paid for the same work, we will refer to them as "career professionals." When we refer to both groups together, we will call this team "volunteer and career professionals."

How might this tension play out in your agency? What are the landmines of sensitivity for both groups? Take a minute and think about the "true resisters" on each side of the marriage. What are they going to say (or do) to the other side that will be barriers to making the marriage work?

Volunteer Professionals' Sensitivity Landmines	Career Professionals' Sensitivity Landmines
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Now think about what each side will do or say to "set the other side off."

Volunteers set off career personnel by saying or doing ...	Career personnel set off volunteers by saying or doing...
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What actions might you take to keep this from happening?

## Culture Change

To begin, let's take a look at what we mean by culture change. Simply stated, culture is "the way we do things around here." More specifically, culture is made up of individual:

- **Beliefs** – The values members hold about what is good or bad, right or wrong. Example: "Volunteers should not be paid for giving service."
- **Behaviors** – Actions based on beliefs about what members should or should not do. Example: "EMS professionals should always act with confidence to reassure patients."
- **Assumptions** – Unexamined explanations of the way their world works based on past experience. Example: "Paid professionals don't respect volunteers."

Therefore, to make the marriage work leaders must modify the beliefs, behaviors and assumptions by **both** volunteer and career professionals. To accomplish this, leaders must move both groups from:

- Independence to Interdependence
- Hostility to Support

Take a moment to examine your beliefs, behaviors and assumptions about the marriage.

Beliefs – What values do both groups hold in common? What values are different?

Behaviors – What behaviors would you use to characterize volunteers vs. career professionals?

Assumptions – What assumptions do both groups hold about each other? How valid are these assumptions?

### **Implementation Change Strategy**

We have said that the marriage will survive if leaders move both groups towards interdependence and active support. Let's look at each separately.

#### **From Independence to Interdependence**

1. One strategy is to not build two separate organizations that can stand-alone. We are just reinforcing independence. Create jobs that require interdependence of action.

2. Find common values between the groups and use these in your vision of the future.
3. Expect resistance to this change, but keep it in the open so you can deal with it. Use the tactics for resistance to change discussed in the Change Process section. Discuss inaccurate assumptions the groups have about each other.
4. Spend the most time with your early adapters and create a critical mass of committed members to work on the fence sitters.

Given your organization's unique situation, how might you move both groups towards interdependence? Identify the behaviors you want from both groups that indicate interdependence.

### **From Hostility to Support**

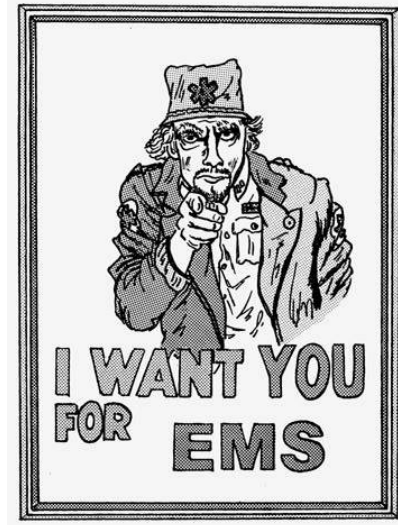
1. Refocus volunteer professional's resistance to the change from the career professionals to the realization that the business is undergoing fundamental change. Help them understand that a future with career professionals is more attractive than one without them. Do not support a "win-lose" mindset.
2. Make it clear to the career professionals that their future is better with volunteer professionals in it, and that they must accept and respect the volunteers' legacy. Do not support a "win-lose" mindset. Apply consequences. Reward those who move towards the change and punish those who throw up barriers.

3. Make sure that support given is balanced by support received. Don't let the give-get relationship get out of balance.
4. Don't expect the emotions of support to come easily. Focus on moving both groups through the physical and intellectual stages of change first.

Given your organization's unique situation, how might you move both groups towards support? Identify the behaviors you want from both groups that indicate support.

## The Recruiting Process

Can a strong recruiting process save a weak retention process? Before you answer that question, consider the amount of time you spend on both. If you are like most EMS Agencies, you spend a lot more time on recruiting than on retention. For many, this is similar to filling a bucket with water that has a hole in the bottom. Does your organization have a bad case of the leaky bucket syndrome?



This section deals with the recruiting process and its relationship with the retention process. The focus here is to understand how these two processes should work together. Because the **output** of the recruiting process is the **input** of the retention process, the **hand-off** between the two is critical.

### **The Recruiting Process**

Your recruiting process should be designed to find and convince good people to join the agency. Think of the recruiting process as a pipeline of potential members moving towards affiliation with the agency. (Pipeline graphic)

There are normally three sources of potential members to feed this pipeline:

- **Advertising** – Advertising is used to make potential members more aware of your organization. This activity must be done over and over again since it takes time to reach all members of the community and because there are competing messages in the communication channel.
- **Networking/Word of Mouth** – This source is composed of “talent scouts” that introduce the organization to potential members and make the first connection. Once established, the network is more effective in bringing in a consistent stream of candidates who have been “pre-screened” by the scouts.
- **Legacy/Family Member** – This source has the most power in attracting new members since they usually have intimate contact with the organization. Over use of this source may limit a full representation of the community in the pipeline.

What sources do you use in your recruiting pipeline? How can you broaden your pipeline sources?

The pipeline itself is composed of potential members who are:

- **Unaware** – These are potential members in the community who are not aware of the potential opportunities in EMS.
- **Aware** – These are potential members who are aware but have not yet experienced an event that moves them towards seeking more information or contact with the agency.
- **Interested** – These are potential members who are actively interested. They are seeking information and contact. They may or may not be a good fit. Their interest will diminish if you do not actively cultivate it. From a public relations point of view, screening out members should take place at this step.
- **Intimate** - These are potential members who have enough intimate knowledge of the organization to determine if affiliation is the right step. It is at this point that expectations by both sides are being formed, and they should be mutually clarified.

From a process point of view, you should have a series of actions that you take at each point in the pipeline to move potential members towards affiliation.

List the actions you currently take or should be taking at each point in the pipeline.

**Unaware**

**Aware**

**Interested**

**Intimate**

## **The Hand-Off**

It would be a mistake to think that the recruiting process and the retention process are separate. The two should flow easily together because the hand-off from one to the other is the most important step in your recruiting process. Done well, this step can significantly add to the retention of members since the majority of new members are lost within 90 days of this hand-off.

The specific programs that should facilitate this hand-off are discussed in the next section.

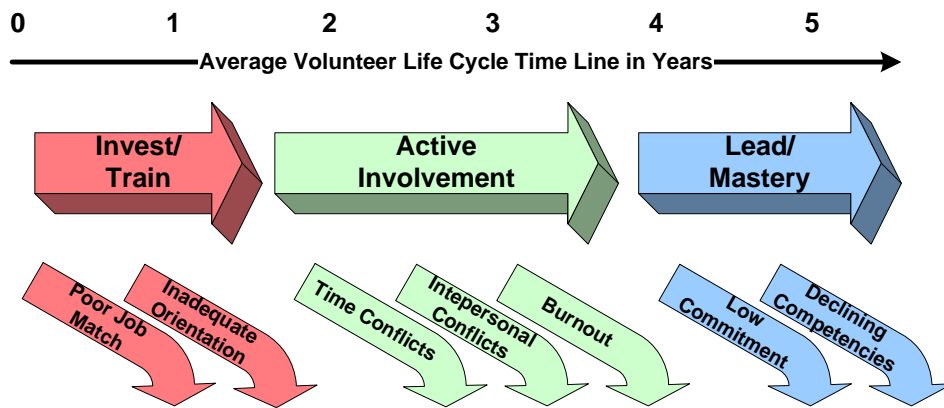
## The Retention Process

Your retention process should be designed to keep good people longer. That is the name of the game. Think of members as clocks with retention springs. Over time the retention spring winds down and sooner or later members are going to leave. Members have told us that there are certain events that impact their retention springs, and your retention process should be designed to reduce the impact of damaging events and reinforce the impact of energizing events. Because these events occur over the life time that the member stays with the squad, they fall into three major phases of what we call the member's "retention life-cycle."



### The Retention Life Cycle

Here are the three major phases that members go through over time.



**Common Retention Barriers Leading to Turnover**

- **Invest & Train** – In this phase, members go through training and are prepared for service. This phase, people tell us, can last from seven to 18 months. The major retention barriers in this step are poor job match and inadequate orientation. Losing a member at this point carries a high price tag since you have invested a great deal of time and effort that will be lost if the member leaves.

- **Active Involvement** – In this phase, members become active in service delivery. If they are successful in the job, this can lead to high job satisfaction that reinforces commitment to the squad. The major barriers are time conflicts with work, family or school, interpersonal conflicts with other members and burnout. Losing a member at this point impacts the day-to-day operations and places stress on those who have to pick up the slack.
- **Lead & Mastery** – In this phase, members decide how deeply they want to be involved by taking on a leadership role or by developing a higher level of technical mastery. The major barriers are declining commitment and falling behind technically. Losing a member at this phase means that critical know-how and experience will be lost that will take time to replace. This know-how and experience will also not be available to guide newer members.

## The Program Trap

Having identified retention problems, it is at this point that many organizations fall into the “program trap.” This trap is based on the assumption that each new retention problem needs a new program. This approach can lead to multiple programs with multiple goals consuming scarce resources. And as programs become stale, a search is launched for “new” programs. If you want to maximize your efforts, you should be focusing on fewer rather than more retention programs, and those programs should be based on principles of retention rather than on specific problems.

## Retention Principles

Here are the principles we have in mind.

- **The Belonging Principle** – Members stay longer when they feel welcome, needed and respected. This means that:
  - ✓ Members feel *welcome* when all members accept them into the organization. This, by the way, does not happen just at the start of membership. This feeling has to continue throughout the relationship. And unfortunately, some members “wear out their welcome.”
  - ✓ Members feel *needed* when they are asked to contribute to the organization’s success. The feeling deepens as the organization comes to rely upon them. Don’t confuse asking members to do jobs that no one wants to do as fulfilling this need.
  - ✓ Members feel *respected* when others value what they do or say. This is such a strong need that high levels of disrespect can result in people “going postal.”

- **The Success Principle** – Squad members stay longer when they achieve success in important personal goals. To use this principle:
  - ✓ Find out what's bugging people – This means systematically asking people what is bugging them, listening and understanding their point of view, and taking action to reduce the frustration.
  - ✓ Keep the give/get checkbook in balance – This means that when members join, they have expectations about what they will be asked to give and what they expect in return. When this checkbook gets too far out of balance, members leave.
  - ✓ Hook them on life-long learning – EMS providers tell us that learning new things is one of the attractions to the profession. A really solid, high quality, on-going training program is a must.
  
- **The Friends & Family Principle** – Members stay longer when they develop strong personal relationships within the squad. To use this principle:
  - ✓ Develop a relationship friendly organization environment – Manage cliques, keep cooperation high, and quickly diffuse interpersonal conflicts. When members are having problems, see that someone comes to their aid.
  - ✓ Select relationship friendly members. Carefully select the right new members who can support an environment of friends and family.
  - ✓ Hold relationship friendly activities – Leaders need to support activities and values that keep the friends and family environment alive.
  - ✓ Eliminate those unsupportive of relationships – Regular weeding out of those who do not support a friends and family environment is a part of good leadership.

## Core Retention Programs

Our point of view is that you should have a few, well run retention programs. We have not seen much evidence that “more is better.” We have highlighted six programs in this section. These programs should acknowledge that members’ needs change over time as described in the retention life-cycle principle. Except for new member orientation and training, the list is not in any order. If your EMS agency is not large enough to manage all six programs, think of ways to have events throughout the year that cover these programs’ content.

1. **New Member Orientation & Training Program** – This is the most important program that an organization should have to maximize retention efforts. The program should include:

- An introduction to the history and the communities it serves.
- A personal introduction to all officers and their responsibilities as elected leaders.
- Social functions or a mentor to introduce new members to groups and/or individuals.
- An introduction to the cultural values that all members are expected to uphold in how they treat each other and how to interact with patients and the public.
- Instruction in how to perform the basic maintenance of vehicles, equipment and buildings.
- Instruction in how to perform basic EMS life saving services.
- Instruction in how to perform the tasks in their initial assignments.
- A 90-day formal review to gather feedback from the new member and to identify any additional training or orientation required.
- A set of measurements to determine new member progress.

The program should have an orientation checklist to set expectations and guide the new member through the first 90 days.

How would you rate your new member orientation program? (High - Medium – Low).  
What changes should you make to maximize its effectiveness?

2. **Membership Feedback Program** – This program is designed to maintain an appropriate level of contact with all members to:

- Uncover areas of individual concern before they become serious barriers to success.
- Let them know when they are doing a good job.

The program should have both formal and informal components.

**Formal** – An officer should meet annually with each active member to discuss if the member’s expectations are being met. This review should lead to appropriate action planning to keep the “give-get relationship” in balance.

**Informal** – Leaders should be trained in basic coaching techniques to know how to give and get feedback.

How would you rate your organization on maintaining contact with members?  
(High – Medium - Low) What changes should you make to maximize the feedback process?

3. **EMS Agency Improvement Program** – This program is designed to identify those policies, practices and methods that are outdated, ineffective and need to be improved. Each year the squad should take a systematic review of “how we do things around here” and make them better. Call it a “Cut Out the B.S. Program.” Suggested places to investigate include:

- Bureaucratic practices that were designed to solve an old problem that no longer exists.
- Work methods that have too many unnecessary steps.
- Policies that cannot realistically be enforced or have no clear positive impact.

How would you rate the squad’s effectiveness at continuously improving itself?  
(High – Medium – Low). What changes should you make to maximize improvements?

4. **Leadership Development Program** – This program is designed to ensure that the organization has a ready supply of trained, experienced leaders. Current and potential leaders should have the following skills and experience:

- One-on-one coaching skills to identify and correct performance problems.
- Meeting facilitation skills to make meetings a more effective management tool.
- Interpersonal sensitivity skills to identify and resolve conflicts resulting in a “win-win” resolution.
- Exhibit a bias for action with a sense of urgency and the persistence to follow through to ensure results.
- Oral communication skills to speak clearly and concisely in groups and one-on-one. Listen to others’ concerns, suggestions and questions.

How would you rate the overall leadership skills in your organization? (High – Medium – Low). What changes would you make to maximize leadership development?

5. **Professional Development Program** – Professional development has been identified as a strong need for most EMS professionals. In fact, many business professionals will give up raises and promotions to move towards mastery in an area they are passionate about. Suggested approaches are:

- Ask members with higher certification levels to instruct others on topics required for advancement.
- Bring in guest speakers from the community to educate members on local needs and concerns about patient care.
- Ask the Bureau of EMS or your Regional EMS Councils to prepare material or provide speakers to keep the squad up to date on the EMS profession. Look at EMS related web sites for professional development programs. See the Resources Section on page 41 for suggestions.

What is the overall level of professional development activities in the organization? (High – Medium – Low). What can you do to maximize professional development?

6. **Relationship Building Program** – Actions and activities in this program are designed to:

- Improve the acceptance of individual members.
- Encourage the development of strong personal relationships.
- Create a family and team-focused environment that builds individual commitment.
- Sponsor activities that balance fun with community service.

Suggested activities include:

- Providing a mentor or “buddy” who introduces the new member to others.
- Provide activities that bring together members who would not usually get together on their own. Use picnics, socials, and training to “mix and match.”
- As part of each training session, take time to build relationships before, during or after the training.

How would you rate the overall strength of personal relationships in the squad? (High – Medium – Low). What changes should you make to improve relationships?

## Moving From Good Intentions to Results

By now you should have decided whether you are comfortable with your retention efforts or find that you have more work to do. Hopefully, you have found some good ideas that you want to try out with your squad. This section is designed to help you organize your thoughts and to plan action steps. It is also a summary of all of the key points in the workbook.

Answer the questions below to help you get focused.

### First retention project, Mark?



1. What is the most critical retention gap you face in your agency? A gap is the difference between where you want to be and where you are right now.
2. How important is closing this gap? What will happen if you don't do anything?
3. What is the urgency in closing this gap? How much time do you have to close this gap before something serious might happen?
4. Why aren't the current retention programs successful in addressing this gap?
5. What actions must you take in the next 90 days to show significant improvement in closing this gap?

## The Impact of Change

Next, let's look into the impact of change on your action plan. Now is a good time to review the Crisis of Change section to refresh your memory. Please complete the following survey.

Questions	Circle One
1. How disruptive will this change be to those who have to change?	High Medium Low
2. How consistent is this change with the current culture?	High Medium Low
3. How supportive will other leaders be to this change?	High Medium Low
4. What is the level of readiness for change in the organization?	High Medium Low
5. What is the level of resistance expected to this change?	High Medium Low

Based on the questions above, what is the level of risk associated with the implementation?

### High Risk

- High levels of disruption caused by the change.
- Change inconsistent with the current culture.
- Low level of leaders' support for the change.
- Low level of readiness for change in the squad.
- High level of resistance expected.

**Risk Associated With This Change**                      **Circle One**  
**High    Medium    Low**

What steps do you plan to take to move your organization from resistance to compliance and finally to commitment? Remember your steps will be different for Early Adopters, Fence Sitters and True Resisters.

## Using Retention Principles

How well does your action plan use sound retention principles? Please complete the following survey. How well does your action plan:

Questions	Circle One
<b>The Belonging Principle</b>	
1. Help members feel more welcome?	High Medium Low
2. Help members feel more needed?	High Medium Low
3. Help members feel more respected?	High Medium Low
<b>The Success Principle</b>	
4. Help find out what's bugging people?	High Medium Low
5. Keep the give/get checkbook in balance?	High Medium Low
6. Hook members on life-long learning?	High Medium Low
<b>The Friends &amp; Family Principle</b>	
7. Help develop a relationship friendly environment?	High Medium Low
8. Help select relationship friendly members?	High Medium Low
9. Help improve relationship friendly activities?	High Medium Low
10. Help eliminate those unsupportive of relationships?	High Medium Low

While it is not likely that you will use all principles in your action plan, the more principles you use, the more effective the plan.

How might you modify your action plan to incorporate more retention principles?

## **Core Retention Programs**

Does your action plan add retention programs rather than strengthen the ones you already have? As we said before, we have not seen much evidence that “more is better.”

Does your action plan strengthen any of the following programs?

- New Member Orientation & Training Program
- Member Feedback Program
- EMS Agency Improvement Program
- Leadership Development Program
- Professional Development Program
- Relationship Building Program

### **Keeping The Best!**

We have said it before, but it bears repeating. Retention is all about keeping good people longer. We hope this workbook has sparked in you a desire to continue to improve your retention of good people. Good people are hard to find and even harder to keep. And you are going to need good people to remain competitive in the future. Let us know if we can help!

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## Resources

Pennsylvania Department of Health  
Bureau of EMS  
Room 1032, Health and Welfare Building  
7<sup>th</sup> and Forster Street  
Harrisburg, PA 17120  
(717) 787-8740  
[www.health.state.pa.us/EMS](http://www.health.state.pa.us/EMS)

Pennsylvania Emergency Health Services Council  
600 Wilson Lane  
Suite 101  
Mechanicsburg, PA 17055  
(717) 795-0740  
[www.pehsc.org](http://www.pehsc.org)

Bradford Susquehanna EMS Council  
123 West Lockhart Street  
Sayre, PA 18840  
(570) 882-6390 FAX (570)882-6053  
<http://www.bsems.org/>

Bucks County Emergency Health Services  
911 Ivyglenn Circle  
Ivyland, PA 18974  
(215) 340-8735 FAX (215) 957-0765  
<http://www.bcehs.com/>

Chester County EMS Council  
Department of Emergency Services  
Chester County Government Services Center  
601 Westtown Road - Suite 12  
West Chester, PA 19382-4558  
(610) 344-5000 FAX (610) 344-5050  
<http://www.chescoems.org/>

Delaware County EHS Council, Inc.  
201 W. Front Street  
Government Center Building, Rm. 117  
Media, PA 19063  
(610) 891-5310 FAX (610) 566-3947  
<http://www.co.delaware.pa.us/intercommunity/ems.html>

Eastern PA EMS Council, Inc.  
1405 North Cedar Crest Blvd. - Suite 208  
Allentown, PA 18104  
(610) 820-9212 FAX (610) 820-5620  
<http://www.easternemscouncil.org/>

EHS Federation, Inc.  
722 Limekiln Road  
New Cumberland, PA 17070  
(717) 774-7911 FAX (717) 774-6163  
<http://www.ehsf.org/>

Emergency Medical Service Institute  
221 Penn Avenue, Suite 2500  
Pittsburgh, PA 15221  
(412) 242-7322 FAX (412) 242-7434  
<http://www.emsi.org/>

EMMCO East, Inc.  
1411 Million Dollar Highway  
Kersey, PA 15846  
(814) 834-9212 FAX (814) 781-3881  
<http://www.emmcoeast.org/>

EMMCO West, Inc.  
16271 Conneaut Lake Road  
Meadville, PA 16335  
(814) 337-5380 FAX (814) 337-0871  
(814) 870-1010  
<http://www.emmco.org/>

EMS of Northeastern Pa, Inc.  
1153 Oak Street  
Pittston, PA 18640  
(570) 655-6818 FAX (570) 655-6824  
<http://www.emsnp.org/>

LTS EMS Council  
542 County Farm Road, Suite 101  
Montoursville, PA 17754-9621  
(800) 433-9063 FAX (570) 433-4435  
<http://dsf.seda-cog.org/>

Montgomery County Emergency Medical Services  
Office of Emergency Medical Services  
50 Eagleville Road  
Eagleville, PA 19403  
(610) 631-6520 FAX (610) 631-9864  
<http://www.montcopa.org/EOC/>

Philadelphia EMS Council  
3061 Island Avenue  
Philadelphia, PA 19153-3015  
(215) 685-4216 FAX (215) 685-4207  
<http://www.phila.gov/RegionalEMS/>

Seven Mountains EMS Council, Inc.  
523 Dell Street  
Bellefonte, PA 16823  
(814) 355-1474 FAX (814) 355-5149  
<http://www.smemsc.org/>

Southern Alleghenies EMS Council, Inc.  
Olde Farm Office Centre – 1 Carriage House  
Duncansville, PA 16635  
(814) 696-3200 FAX (814) 696-0101  
<http://www.saems.com/>

Susquehanna EHS Council, Inc.  
249 Market Street  
Sunbury, PA 17801-3401  
(570) 988-3443 FAX (570) 988-3446  
<http://www.sehsc.org/index.asp>

Virginia Department of Health  
Office of Emergency Medical Service  
P.O. Box 2448  
Richmond, Virginia 23218-2448  
1-800-523-6019 (VA ONLY)  
[www.vdh.virginia.gov/oems](http://www.vdh.virginia.gov/oems)

National Highway Traffic Safety Administration  
EMS Division  
[www.nhtsa.dot.gov/people/injury/ems/index.html](http://www.nhtsa.dot.gov/people/injury/ems/index.html)

Renaissance Resources  
Business Consultants  
9100 Arboretum Parkway, Suite 270  
Richmond, Virginia 23236  
804-330-3088  
[www.renaissanceresources.com](http://www.renaissanceresources.com)

## Notes

## Let's Stay In Touch

If you enjoyed working with us through this workbook and are interested in continuing to improve your skills in and understanding of retention, let's stay in touch. We want to hear from you. We want to hear about your successes and about good intentions that didn't work out.

We hope this workbook will be the start of an on-going dialogue about how to keep good people in your EMS agency. Pennsylvania is going to need their help, as more people are attracted to our wonderful state.

We would like to gather your insights and pass them along to others. You can join this network by completing the following form and returning it to: PEHSC, 600 Wilson Lane, Suite 101, Mechanicsburg, PA 17055 or complete the survey on the BEMS website <http://www.dsf.health.state.pa.us/health> or PEHSC website [www.pehsc.org](http://www.pehsc.org). Go to the Recruitment and Retention section to find the survey.

**Name:**

**EMS Agency:**

Home Phone \_\_\_\_\_

**Business Phone** \_\_\_\_\_

**E-Mail Address** \_\_\_\_\_

I'd like to learn more about:

I have some insights to share on:

Please contact me about  
other retention resources.

Yes.

No.

