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## Effective Succession Planning and Organizational Development for Behavioral Health Leadership

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# Walden University

College of Social and Behavioral Sciences

This is to certify that the doctoral study by

Amanda Brown

has been found to be complete and satisfactory in all respects,  
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2023

Abstract

Effective Succession Planning and Organizational Development

for Behavioral Health Leadership

by

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MS, Nova Southeastern University, 2010

BS, University of Central Florida, 2005

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Psychology in Behavioral Health Leadership

Walden University

May 2023

## Abstract

High turnover rates can challenge an organization's ability to provide quality care to clients, maintain a safe environment, and achieve strategic goals. Effective retention strategies can allow the organization to grow and develop to continue to provide services for those in need. The focus of this study was identifying how an organization can improve its retention strategies, create succession plans, and decrease turnover to encourage organizational growth. The Baldrige Excellence Framework was used to guide the study, focusing on leadership, workforce, operations, and management. Data were collected through multiple sources. Semi structured interviews were used to gather data through open-ended questioning of four senior-level leaders. Next, human resource policies, digital data, and other corporate and historical documents were examined. Data validity was ensured through member checking. Results indicated that employees were unsatisfied, overworked, and underappreciated. Improved employee engagement is recommended to increase employee satisfaction and retention. It is recommended that the organization prioritize retention programs and succession plans with individual employees. The findings of this study underlined that retention of health workers required a combination of strategies from the national to the facility level, financial and nonfinancial, and strategies that target the individual health worker as well as the general community where they work. Improving retention and creating succession plans in behavioral health settings contribute to positive social change, as stability is essential for successful behavioral health treatment outcomes.

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## Section 1a: The Behavioral Health Organization Introduction

Organizational change should generate an enlightening environment that creates incentives for corporate growth and incorporates personal and professional skills development with a conscious understanding of perceptions related to work (Kolbergytė & Dromantaitė, 2022). These perceptions are important for understanding why employees leave a job or stay. Poor workforce retention, mental health, and well-being are pressing concerns within behavioral healthcare and are known to be associated with each other (Turley et al., 2022). Organizational growth focuses on three goals: productivity, connection, and self-realization (Kolbergytė & Dromantaitė, 2022). There are multiple reasons why behavioral health workers are particularly vulnerable to adverse outcomes and turnover. These reasons include high work demands, ineffective bureaucratic structures, and little opportunity for advancement (Turley et al., 2022). Research literature that comprehensively analyzes growth opportunities considering administrative, social, emotional, and spiritual aspects is lacking (Kolbergytė & Dromantaitė, 2022). The challenge lies with the organization to complete its mission, reach its vision, and compete successfully in an environment that constantly changes.

Over 4 million people in the United States quit their jobs in August 2021 (U.S. Bureau of Labor Statistics, 2021), and almost half (48%) of the United States' working population was actively searching for a different job (Gallup, 2021). Turley et al. (2022) explained how some organizational factors are related to the development of resilience to burnout, suggesting that efforts to improve employee mental health or well-being may have domino effects on staff retention.

When mental health professionals leave organizations, detrimental effects on the quality of patient care occur (Yanchus et al., 2017). According to Yongren et al. (2017), substantial research on organizational recruitment suggests that social network ties between employees and outsiders play a crucial role in promoting recruitment and facilitating membership growth. Yanchus et al. (2017) found that reasons for leaving include incivility, lack of autonomy, perceptions of unfair treatment, and feeling psychologically unsafe at work. Organizational change affects personal motivation, self-realization, and identity perception; therefore, concentration on otherwise-oriented work values increases change engagement and maintains long-term loyalty (Kolbergytė & Dromantaitė, 2022).

Organizations have a variety of goals; however, those that do not implement change effectively will not likely be around long enough for their other plans to be achieved (Yongren et al., 2017). Organizations require many different resources for survival, but contributions by employees are invaluable. Employees fulfill vital organizational roles and provide the means for obtaining all other resources. According to Shange et al. (2022), research suggests that career growth positively relates to organizational citizenship behavior (OCB). OCB refers to employee behaviors that facilitate the effective operation of the organization (Shang et al., 2022). The factors that motivate employee OCB may fall into two categories: (a) individual factors, including prosocial motivation and personal career management, and (b) organizational factors, including self-sacrificial leadership and having a high-performance work ethic (Shang et al., 2022). A company's most valuable resource is its human capital (Shang et al., 2021).

Therefore, talent retention should be high on the agenda for any business whose leaders are hoping for sustainable success. It is vital to identify gifted individuals and nurture them in preparation for top management positions in the future.

Behavioral Health Organization A (BHOA) provides mental health, substance abuse, and eating disorder treatment throughout the United States. The organization includes over 130 recovery centers along the Pacific Coast, from California to Washington, throughout the Midwest and southwest, and at various points along the Atlantic, from Florida to New England. The BHOA offers many programs, including outpatient, partial hospitalization, intensive outpatient, and residential care for adolescents and adults. According to the BHOA's website, the organization's mission statement is the following: "We save the lives of those we serve with compassionate treatment, evidence-based clinical care, and an unwavering alliance among staff, patients, their families, and communities."

A core belief within the organization is that a happy, rewarding life is everyone's right. The primary goal is to make behavioral healthcare, treating eating disorders, mental health, and substance use disorders accessible and affordable. The organization provides treatment on the ACCESS model, which stands for accessibility, clinical experience, compliance, equality, safety, and superior outcomes.

ACCESS is at the core of the organization's value system. Making behavioral healthcare accessible to all is a vision that informs decisions and shapes the culture. Access to behavioral healthcare means a happy, rewarding life can be a reality for everyone.

Each branch consists of a president, vice president, and CEO for each region, with the president and the board coming first in the chain of command. Under the CEOs are regional directors, program directors, facility managers, and staff at each program. The president and vice president must have master's degrees and a strong background in mental health treatment. Corporate and program leadership must be licensed in their respective states to practice mental health counseling, social work, or marriage and family therapy. The executive directors, program directors, and therapists must also be licensed to practice social work or mental health counseling. The mental health technicians (MHTs) are with the client's 24 hours a day in residential treatment and 8 hours a day in outpatient treatment. The MHTs must have at least 1 year of experience or a bachelor's degree.

The organization had approximately 3000 employees as of 2021. It is privately held, and private equity backed. According to the organization's website, the BHOA is accredited and monitored by The Joint Commission. "The Joint Commission seeks to continuously improve health care for the public, in collaboration with other stakeholders, by evaluating health care organizations and inspiring them to excel in providing safe and effective care of the highest quality and value" (The Joint Commission, 2022). The Joint Commission is the nation's largest and oldest governing body for accreditation and setting standards for healthcare.

BHOA's leadership team members participated in semi structured interviews, providing information about the client population, workforce, leadership governance, strategy, and finance. Responses from the interviewees reflected the experiences and



perceptions of the practice problem. Participants are referred to as Participants 1, 2, 3, and 4 throughout the study to maintain confidentiality. Additionally, the organization is referred to as BHOA.

### **Practice Problem**

According to Linette (2020), approximately 56 million Americans experience mental health or substance abuse problems. Behavioral health needs and vacancy rates for frontline employees and managers are rising steadily (Linette, 2020). Employee turnover has created significant challenges for personnel, and high turnover rates yield adverse consequences for the behavioral healthcare system (Mancuso, 2020). Recruiting and retaining top employees (frontline, clinical, and executive) in the behavioral health and social services field is critical to providing quality services to the community (Linette, 2020).

There are not enough behavioral health professionals within the BHOA due to turnover, which is related to higher operational costs, workload, burnout, and decreases in the safety and quality of patient services (DeCapua, 2016). The goal is to retain employees, even during times of organizational change. The BHOA has training and retention programs; the question is, are they practical and effective, and is corporate growth and development a factor in employee retention? High employee turnover without a clear succession plan leaves the organization with critical job vacancies, impacting operations and interrupting client services. It is vital to have a culture conducive to growth and development to implement effective retention and succession plans. Valentine (2012) explained that leadership is crucial in creating and maintaining an

organization's culture and development. The administration should support organizational growth by supporting the organization's ideologies, values, and norms (Valentine, 2012). It is essential to create a culture that breeds growth and opportunity for current employees through succession and retention planning.

Addressing retention and turnover is crucial for sustaining an organization. According to Yongren et al. (2017), recruitment is the rate at which new employees enter the organization, and retention is the rate at which existing employees remain within the organization. Employee participation grows when the number of recruits outweighs the number lost and declines when an organization fails to replace members who leave (Yongren et al., 2017). The value within an organization is often intangible, meaning it lies in the employees, intellectual property, expertise, relationships, and business process, not in products or services (Byerly, 2012). A crucial part of ongoing organizational development is keeping the right people. Therefore, the organization must understand its employees and their needs in the workforce. A challenge of successful succession is identifying the trends that mask the leadership capabilities of a company's high-potential candidates (Makino & Oliver, 2019).

The BHOA reports that frontline workers or mental health technicians have the highest turnover rate. These are entry-level positions and tend to consist of younger employees. Millennials comprise the most significant workforce (Watts & Dieffenderfer, 2021). At 80 million, the millennial generation surpasses the baby boomer generation, making it the largest generation currently in the workforce.

The behavioral healthcare field is experiencing an increased demand for essential services to communities. This increase is based on the availability of healthcare coverage to previously uninsured individuals after the Affordable Care Act passed (Koppel et al., 2017). To meet this demand for treatment, the workforce of behavioral health technicians and therapists must expand. The largest generation entering the workforce, the millennial generation (those born after 1980), is believed to lack commitment to their employers, frequently leaving their positions for the next best offer (Gomel, 2015).

Turnover adversely impacts the quality of care and employee morale and places immense pressure on an organization's budget (Koppel et al., 2017). Chang and Besel (2021) suggested that organizations should provide monetary and intangible incentives to recruit younger candidates and defer baby boomers' retirement. Watts and Dieffenderfer (2021) reported that 83% of millennials feel connected when they believe their organization promotes an inclusive culture, compared to only 60% of millennials who think their organization does not adopt an inclusive culture.

Fewer workers will start their careers at the traditional entry level, and their work-life values will also differ from those of the older generation. Because new generations prefer short-term gains and immediate rewards for performance and challenging work with subsequent advancement, the traditional way to compensate for work needs to be reevaluated (Chang & Besel, 2021).

Research questions to address the need of the BHA practice problem directed data collection:

RQ1: Does the organization create an environment that encourages learning, promotes patient and customer engagement and safety, and participates in succession planning for the development of future organizational leaders?

RQ2: What strategies or techniques can behavioral health leaders employ to establish a plan for leadership succession that encourages organizational growth and development?

### **Purpose**

This study identified growth and development factors essential to successful employee retention and succession planning. This study focused on a behavioral health organization based on the west coast of the United States that had faced issues with turnover and retention of employees. This study provided recommendations to the organization to improve its retention programs and succession plans to maintain positive organizational growth. According to Yongren et al. (2017), regardless of the corporate domain, every organization's existential challenge is to support recruitment and retention and create a succession plan that will enable it to grow.

The Baldrige Excellence Framework (2021) was used to guide the study and evaluations. The framework provides a comprehensive list of assessment categories and criteria, including leadership, workforce engagement, and strategy, that organizations use internationally to promote a systems perspective for organizational improvement. The logical links between the framework presented and the nature of the study include leadership, culture, and workforce. Leadership creates and sustains a culture that either encourages growth and development or does not. Valentine (2012) explained that

leadership that supports a culture sustains cultural continuity by nurturing cultural substance, including ideologies, values, and norms. Leadership is responsible for maintaining the mission and underlying components of the organization. The challenge is focusing on organizational leaders' knowledge and skills and empowering the entire organization to achieve its mission and vision and compete successfully in a constantly changing environment (Johnson & Rossow, 2019). Mission and organizational performance concepts can help determine how the organization creates an environment that encourages learning, promotes patient and customer engagement and safety, and participates in future corporate leaders' development (Baldrige, 2021). The Baldrige framework (2021) addresses how the organization recruits, hires, and retains employees. Does the current workforce represent the diverse ideas, cultures, and thinking of the hiring and patient community (Baldrige, 2021)?

The evidence and strategies in this study included semistructured interviews with leadership and review of organizational documentation and other secondary data sources. The first consulting strategy is obtaining client documentation to become familiar with the organization (McNamara, 2005). The semistructured interviews with BHOA's leaders assisted in understanding several leaders' perspectives and experiences related to staff retention and turnover. Through open-ended questions, interview questions focused on gaining information on the respondents' experiences with organizational growth and development (Castillo-Montoya, 2016). Secondary sources of corporate documents were reviewed, including the organization's strategic plan, personnel policies, organizational structure and hierarchy charts, and policies and procedures. Additional secondary sources

included public resources such as BHOA's website, online job posting advertisements, databases, and scholarly journals.

### **Significance**

This study's research fills a gap in applying knowledge to move from research to practice by focusing on organizational growth and development strategies for developing effective employee succession plans within a behavioral health organization.

The results of this study will aid the organization in creating strategies to improve development by strengthening the workforce with qualified behavioral health employees. The BHOA's experience is a model for behavioral health organizations to gauge their staff retention practices and address retention-related concerns.

Additionally, this study allowed the BHOA to compare its performance with competitors and national standards centered around critical indicators and best practices for behavioral health organizations. As a result of this study, behavioral health leaders understand the benefit of retaining staff to enhance organizational performance, provide quality care for their clients, and improve corporate sustainability. Finally, the study results provide insight into best practice strategies for enhancing employee retention.

### **Potential Contribution to Positive Social Change**

This study may influence social change by identifying effective workplace practices that lead to positive organizational change and retaining good employees. Indeed.com (2022) mentioned that the characteristics of “good” employees are dedication, confidence, reliability, independence, teamwork, people skills, and self-awareness. The organization will maintain employees by developing them and creating a leadership

pipeline for succession. This study may contribute to behavioral health organization by offering strategies to improve organizational growth and development, expand the workforce, and retain resolute employees. This qualitative case study model allows organizations to evaluate staff retention issues and understand retention strategies.

The population served has typically experienced elevated levels of inconsistency, abandonment, and trauma. This study is significant because it provides evidence of best practices and programs that improve retention during organizational change. The BHOA and other behavioral healthcare corporate leaders understand the value of investing in employees to improve client services and sustain the organization.

### **Summary**

Staff retention is crucial for the organization's success and sustainability. There are substantial employee turnover costs, such as separation costs, vacancy costs, costs of recruiting and interviewing potential candidates, replacement costs, training costs, and decreased service costs, which occur during the warm-up period for a new employee. Employee loss also affects current employees as there is added stress from covering lost employees' job duties (Byerly, 2012).

In Section 1b, I describe BHOA's organizational profile and provide a general overview. This section includes the organizational structure, staff and stakeholder profiles, regulatory requirements, strategic vision, and continuous improvement plans. The organization's profile also includes factors contributing to low retention and critical organizational communication and support processes.

## Section 1b: Organizational Profile

Researchers have continued to examine why employees voluntarily abandon their jobs (Rubenstein et al., 2018), and top-level managers continue to address employee retention issues (Belbin et al., 2012). Personnel separations can disrupt patient services, decrease business performance, affect the organization's competitive nature, increase the workload for remaining employees, exhaust the employee pool, and result in a turnover domino effect (Lee et al., 2018). Staff retention is critical for organizational performance and growth in behavioral health. Mental health technicians and therapists are vital for individual programs and corporate sustainability. They are often seen as frontline workers, or the face of the organization, as they have more direct contact with clients and families than any other position.

Whether incremental or organization-wide, an effective change process follows a sequence of events (Johnson & Rossow, 2019). Depending on the scope of the change initiatives, the process can be challenging to organize and explain. This study examined current techniques and strategies of organizational development that BHOA leaders have explored to improve retention. According to Johnson and Rossow (2019), the action research model represents a philosophy of change that incorporates employee participation, engagement, and empowerment into the change process. Understanding how corporate growth and development impact retention and the existing gaps can help BHOA leaders identify opportunities for increased retention among the frontline staff. Therefore, examining turnovers could provide valuable knowledge for BHOA leaders to



improve retention rates, which can help accomplish organizational goals and fulfill the mission.

Recruiting and retaining top employees (frontline, clinical, and executive) in the behavioral health and social services field is critical. Behavioral health needs and vacancy rates for frontline employees and managers are rising steadily (Linette, 2020). According to Linette (2020), approximately 56 million Americans experience mental health or substance abuse problems. Specific recruiting and retention issues differ for personnel at executive, clinical, and paraprofessional levels. Each specialty has its own needs. In addition to the business skills needed in frontline managers, leaders in behavioral healthcare need to be aware of the unique issues that arise when planning and managing behavioral health programs (Linette, 2020). Employee turnover has created significant challenges for personnel, and high turnover rates yield adverse consequences for the behavioral healthcare system (Mancuso, 2020).

There are not enough behavioral health professionals within the organization due to turnover, which is related to higher operational costs, workload, burnout, and decreases in the safety and quality of patient services (DeCapua, 2016). The goal is to retain employees, even during times of organizational change.

This study's research fills a gap in applying knowledge to move from research to practice by focusing on organizational growth and development strategies for developing effective employee succession plans. The results of this study may aid the organization in creating strategies to improve development by strengthening the workforce with qualified behavioral health employees.

### **Organizational Profile and Key Factors**

BHOA's organizational profile was based on a review of internal documents and public resources describing the services provided; the mission, vision, and values; workforce profile; assets; regulatory requirements; organizational structure; governing system; and critical pieces (patients, customers, and stakeholders). Furthermore, communication methods, competitive environment, job requirements, engagement strategies, continuous improvement plans, and employee turnover were assessed. BHOA's training, compliance requirements, hiring practices, and safety provisions were also reviewed.

Aspects of leadership, workforce, strategy, and performance improvement are vital components of the practice problem of organizational development and succession planning. Change is inevitable, and development is not an option but a necessity (Johnson & Rossow, 2019). How senior leaders communicate change and engage the entire workforce is relevant for maintaining a high-morale culture to retain and grow quality employees. Corporate management is experiencing increasing demand for human or social sustainability for employee preservation, support, and professional development (Kolbergytė & Dromantaitė, 2022). Companies must focus on organizational identity, dematerialization, and collaboration, allowing employees to commit to organizational change. Organizational transformations affect personal motivation, self-realization, and identity perception; therefore, concentration on otherwise-oriented work values increases change engagement and maintains long-term loyalty from the employees (Kolbergytė & Dromantaitė, 2022).

The mission and vision are the guiding principles of the organization. BHOA's mission, according to the organization's website, is to "save the lives of those they serve with compassionate treatment, evidence-based clinical care, and an unwavering alliance among staff, patients, their families, and communities." BHOA serves adolescents and adults when all other services have failed according to the organization's website. Therefore, addressing BHOA's safety requirements is essential when determining employee retention issues. Employees are more likely to promote an organization's mission and not leave when they feel safe (Pette & Dempsey, 2019).

### **Organizational Background and Context**

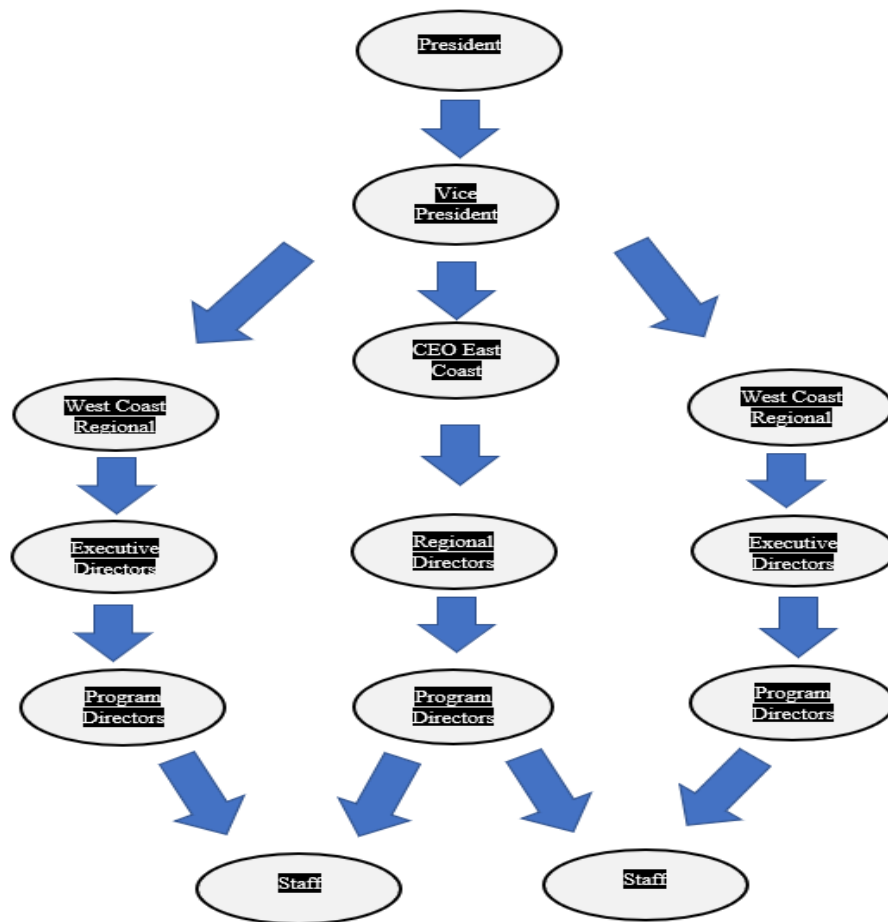
Since its inception, BHOA has made evidence-based, outcome-driven healthcare accessible and affordable. With a full continuum of care such as detoxification, residential treatment centers, partial hospitalization, intensive outpatient services, outpatient services, psychiatric care, neuro centers, and telehealth services, they can offer the proper care at the right time for adults or teens struggling with mental health, substance use, or eating disorders, according to the organization's website. The organization consists of more than 130 treatment centers nationwide, including programs in successful operation since 1985 according to the organization's website. The organization is now a preferred and trusted provider by most insurance companies, which value its clinical rigor and remarkable results, according to the organization's website.

Senior leadership, such as the president, vice president, CEO, and executive leadership teams, execute the organization's vision. Senior leadership meetings occur quarterly and include external and internal directors from different regions. The state

leadership team meets weekly and includes internal directors and managers. BHOA's multilevel leadership extends from the corporate office to the residential leaders according to the organization's website. There are also numerous departmental and program meetings to communicate pertinent information to BHOA's employees (Participant 1). Figure 1 explains the organizational chart and structure.

**Figure 1**

*Organizational Chart*



## **Clients, Other Customers, and Stakeholders**

BHOA provides mental health services to adults and adolescents with eating disorders, substance use disorders, and mental health concerns. Customers and stakeholders include the patients' families, outside providers, referral agencies, and insurance companies. The organization has partners nationwide, which they call their family of brands. These include other treatment centers and houses throughout the nation. The organization has acquired these over the years yet kept their names to maintain the same familiarity and sense of community where individuals can feel safe receiving the treatment they seek.

Companies strive to accommodate stakeholders' demands through cultural development by considering their rights and interests (Pinelli & Maiolini, 2017). Pinelli and Maiolini (2017) reconstructed an alternative view of advancing organizational positions toward proactively promoting stakeholders' interests. BHOA's stakeholders include the board of directors, employees, families, patients, insurance providers, and other mental health professionals. Stakeholders are sources the organization can utilize to achieve organizational goals or recipients of the value organizations create (Barakat et al., 2020). Stakeholders collaborate with the organization and each other to attain their shared interests and goals.

## **Partners and Suppliers**

The organization's suppliers are its customers. Insurance agents and medical and mental health providers provide referrals for patients for treatment. One of the keys to any good recovery program is accessibility through location, finances, in-network

contracts, and the types of programs offered according to the organization's website. The BHOA is committed to providing the ultimate patient access, with more than 100 locations throughout the country and tiered rates that make life-changing care practical and affordable for the most extensive patient base according to the organization's website.

### **Competitive Environment**

The organization's competitive environment involves other behavioral health organizations and treatment centers. The organization is competing for clients and employees within the area. The organization strives to be at the top of the competitive chain with services for clients and employee salaries and benefits. Competitors serving similar geographical locations as BHOA have significantly increased (Participant 3). Exploring these competitors revealed areas that enhance their competitive edges, such as several facilities in their networks, an integrated continuum of care services, smaller client populations to improve individualized care, and extensive service lines. Advanced treatment modalities are available amongst BHOA competitors, including music therapy, art therapy, and equestrian therapy. However, the BHOA clinical staff offers proficiency in various therapeutic disciplines like other centers. All participate in extensive training and highlight many years of firsthand experience. They apply methodologies based on proven and tested results. Their innovative, evidence-based treatments reflect practical thinking perfected through numerous purposeful applications according to the organization's website.

The long-term viability of organization development is in question due to the difficulties of fostering unlimited growth in a world of limited resources (Pinelli, 2017). Pinelli (2017) described the term *sustainable development* (SD) as an aspiring model of change that would not compromise the ability of future generations to meet their needs. Implementing retention strategies, leadership development, and succession planning can offer the organization the needed stability to continue growing (Martin, 2021).

### **Strategic Context**

The BHOA has provided residential and outpatient treatment for adults and teens for over 20 years. The BHOA offers treatment for people with eating disorders, teens with eating disorders, teens with mental health disorders, and teens with substance abuse issues. Each location focuses on specialized treatment programs that provide their clients with the most effective and efficient treatment.

All locations provide treatment for a smaller number of residents at one time to maintain a comfortable setting and a high staff-to-resident ratio. Treatment within the community allows clients to be more comfortable in familiar surroundings and provides greater transferability and acceptance of the treatment experience to life after, according to the organization's website. The organization prioritizes providing an environment where clients feel that they are treated like people, never like patients.

### **Finances**

The company develops an annual operating budget/business plan with extensive input from each line of division leadership and corporate department managers. According to policy number FIN-001 the team works on developing specific goals and targets to

review the prior year's revenue and expenditure history in the third quarter of every calendar year. From this process, the team develops a complementary plan of projected openings of new locations based on corporate growth objectives. The budget/business plan includes a capital expenditure plan, balance sheet, and cash flow.

After multiple rounds of review with the organization's executive management, management reviews the proposed fiscal year's budget with the board of directors. The board of directors approves the budget before the new fiscal year. The approved budget/business plan data are then incorporated in monthly operations meetings, comparing actual revenue/expenses against monthly budgets, and adjusting implementation strategies.

### **Regulatory**

BHOA's program and facility standards are provided and reviewed by The Joint Commission. Joint Commission standards are created with input from health care professionals, providers, subject matter experts, consumers, and government agencies (The Joint Commission, 2022). They are informed by scientific literature and expert agreement and reviewed by the Board of Commissioners. New standards are added to support patient safety or quality of care, positively impact health outcomes, and meet or surpass laws and regulations, and they can be accurately and swiftly measured.

According to website of The Joint Commission (2022), the process for developing the standards includes the following steps:

- Emerging quality and safety issues suggesting the need for additional or modified requirements are obtained through the scientific literature or



discussions with The Joint Commission's standing committees and advisory groups, accredited organizations, professional associations, and consumer groups.

- The Joint Commission prepares draft standards using input from technical advisory panels, focus groups, experts, and other stakeholders.
- The draft standards are distributed nationally for review and made available for comment on the [Standards Field Review](#) page of The Joint Commission's (2022) website.
- After any necessary revisions, standards are reviewed and approved by executive leadership.
- The survey process is enhanced as needed to address the new standards' requirements, and pilot testing of the survey process is conducted.
- Surveyors are informed and trained about assessing compliance with the new standards.
- The approved standards are published for use by the field.
- Once a standard is in effect, ongoing feedback is requested for continuous improvement.

### **Performance Improvement**

The organization focuses on achieving and maintaining its vision and mission.

The organization's vision is that everyone needing mental health, substance abuse treatment, or eating disorder services should access fair, affordable, and effective treatment. BHOA personnel strive to help everyone to have a happy and healthy life.

More than 130 healthcare centers connect people, professionals, and payors nationwide through comprehensive, evidence-based treatment according to the organization's website.). The organization also offers free aftercare and support groups for the clients and their families based on the belief that when access is easy, recovery is possible according to the organization's website.).

The organization has developed several performance improvement systems recently. Each employee has a 90-day annual evaluation for improvement. New frontline technicians also have a 30-60-90-day review to ensure training, competency, and confidence in their job. The organization conducted a company-wide anonymous survey that allowed employees to provide feedback on what they felt was working or not working in the programs, including management and the corporate structure and policies. The organization is creating 'Staff Champions' who will represent each location to convey ideas, problems, and successes and help improve program culture and development. The 'staff champion' may prove vital as they will give the frontline workers (mental health technicians) a voice. Ideas for these staff champions include improving processes or implementing new strategies for positive changes (Participant 2).

The BHOA uses an online incident reporting system that analyses and tracks various incidents and patterns of occurrences within the programs. This online system also tracks necessary corrective actions depending on the type of incident. The system is built for leaders and employees to understand what can be done better and ensure the patients are cared for and followed by procedures. The organization uses Key Performance Indicators (KPI) to measure overall progress (Participant 3). KPI is assigned

to individual programs and reviewed weekly with upper management. (See Table 1).

These tools provide information and expectations to program leadership to achieve and maintain compliance with company standards and the standards of the Joint Commission.

**Table 1**

*Example of Key Performance Indicators*

Data	Goal	YTD average
Time to hire	14 days	7.6
HR files	95–100%	86%
New hire training	100%	*New
CPI/first aid/AED training	95–100%	86%
Monthly training	95–100%	100%
Chart audits	Up to date	Complete
Documentation	Up to date	Not complete
Length of stay	35–45 days	29.5
Discharged against treatment advice	> 6%	7.40%
Peakon Management Support Score	< 7	8.2
Turnover	< 40%	72.90%

### Summary

BHOA is a privately owned mental health provider for adolescents and adults with cognitive, substance use, eating disorders, and behavioral health difficulties. BHOA consists of a traditional organizational structure, where information flows top-down according to the organizational chart. BHOA aims to provide quality services to the most vulnerable population, treating individuals successfully where others have failed. Based on conversations with the leaders, the BHOA recognizes the need to improve the hiring and retention problem. According to the vice president of operations the organization loses approximately 43% of new employees between the offer letter and the anticipated

start date. Therefore, retaining employees starts right from the offer stage. Research is consistent with the negative impact of low retention on organizational performance and quality of services (Chowdhury & Hasan, 2017; Sulek et al., 2017). Therefore, awareness of the voluntary turnover problem among entry-level employees can help resolve the BHOA's retention problem.

Section 2 discusses BHOA's governance, leadership strategy, organizational development strategies, recruiting, and retention programs. The section includes supporting literature and a review of evidence to understand best practices in treatment facilities. Additionally, the study will describe the BHOA's client population and workforce, and the methodology used for data collection.

## Section 2: Background and Approach- Leadership Strategy and Assessment

Researchers have continued to explore why employees voluntarily leave their jobs (Rubenstein et al., 2018), and managers continue to focus on employee retention issues (Belbin et al., 2012). Personnel separations can disrupt patient services, decrease business performance, affect the organization's competitive nature, increase the workload for remaining employees, exhaust the employee pool, and result in a turnover domino effect (Lee et al., 2018). Staff retention is critical for organizational performance and growth in behavioral health. Mental health technicians and therapists are vital for individual programs and corporate sustainability. They are considered frontline workers, or the face of the organization, as they have more direct contact with the clients and families than any other position.

Whether incremental or organization-wide, an effective change process follows a sequence of events (Johnson & Rossow, 2019). Depending on the scope of the change initiatives, the process can be challenging to organize and explain. This study examined the current techniques and strategies of organizational development that BHOA leaders have explored to improve retention rates. According to Johnson and Rossow (2019), the action research model represents a philosophy of change that incorporates employee participation, engagement, and empowerment into the change process. Understanding how corporate growth and development impact retention and the existing gaps can help BHOA leaders identify opportunities for increased retention among the frontline staff. Therefore, examining turnovers provides valuable knowledge for BHOA leaders to

improve retention rates, which can help accomplish organizational goals and fulfill the mission.

There are not enough behavioral health professionals within the organization due to turnover, which is related to higher operational costs, workload, burnout, and decreases in the safety and quality of patient services (DeCapua, 2016). The goal is to retain employees, even during times of organizational change.

The study assessed and described BHOA's current retention practices, identified performance gaps, and emphasized improvement opportunities developed from academic literature. Low employee retention affects an organization's ability to accomplish its mission and goals (Chowdhury & Nazmul, 2017). Employee turnover leads to financial costs for replacing staff and a reduction in the quality of service (Garner et al., 2010).

### **Supporting Literature**

A literature review was performed on organizational and development strategies and succession planning. Various databases were used to obtain relevant peer-reviewed journal articles published within the last 5 years. Literature dated before 2017 was accessed when similar or fundamental studies were identified. Databases accessed for this literature review included APA PsycInfo, SAGE Journals, EBSCO eBooks, ProQuest Central, CINAHL Plus with Full Text, Business Source Complete, and Research Gate. Using the Walden Library's search engine, Thoreau, and Boolean operators, the following descriptors were used for research inquiries:

- employee, staff, turnover, retention
- leadership succession planning

- work culture and organizational culture
- leadership impact and strategy

### **Employee Turnover and Retention**

Employee turnover refers to separating an employee, either voluntarily or involuntarily. Substantial voluntary job abandonment is detrimental to organizations. Staff instability impacts an organization's ability to provide sustainable services (Sulek et al., 2017). Employee retention problems exist globally and have impacted diverse business industries for over 100 years (Rubenstein et al., 2018).

Levels of burnout among primary care clinicians and staff are alarmingly high, and there is a widespread belief that burnout and lack of employee engagement contribute to the high turnover in the workforce (Willard-Grace et al., 2019). Control over employee turnover and successful retention is a great challenge for organizations. Turnover is a widely but inconsistently used measure for healthcare organization analysis, according to Brook et al. (2018). It can include employees who leave a particular post, an organization, or the profession entirely. For example, turnover may be voluntary or involuntary due to performance management. These inconsistencies in data result in a discrepancy in reporting turnover rates (Brook et al., 2018). Preventing turnover entirely is neither possible nor desirable (Rombaut & Guerry, 2019), so the strategy is to keep turnover manageable. Turnover draws on healthcare funding as recruiting new employees into the global or organizational workforce is expensive. It is, therefore, beneficial to consider how to reduce turnover and increase the retention of employees, in relation to voluntary turnover, where employees leave an organization or the profession.

According to Rambout and Guerry (2020), retention strategies such as compensation and recognition positively affect the entire workforce, while training and flexibility do not. According to Rafiq et al. (2021), previous studies have shown a negative relationship between employee engagement and turnover. There is a concern that burnout and low concentration in the workplace may adversely affect patient care, destabilize the workforce, and increase turnover. Turnover may have a cost in terms of the interruption in continuity-of-care relationships and the high expense associated with recruiting new clinicians and staff (Willard-Grace et al., 2019). Positive employee engagement leads to lower turnover rates, and engaged employees have higher productivity, shareholder returns, customer satisfaction, and profitability (Rafiq et al., 2019). Organizational leaders must be aware of the needs of employees, which will help organizations implement specific strategies to improve employee performance and reduce turnover (Al-Suraihi, 2021). An association between burnout and low engagement with employee turnover is plausible and frequently reported (Willard-Grace et al., 2019). Training and new learning opportunities will also considerably affect employees' staying in the organization (Chowdhury & Nazmul, 2021). Boel-Studt et al. (2016) reported that 56% of program directors attributed staff retention issues to inadequate training and low wages.

Turley et al. (2022) explained that research highlights how some organizational factors are related to the development of resilience to burnout, suggesting that efforts to improve employee mental health or well-being may have positive domino effects on staff retention.



When mental health professionals leave organizations, adverse effects on the quality of patient care occur (Yanchus et al., 2017) in areas such as workforce operations and work culture, due to differences in individual thinking (Ringkot, 2022). According to Yongren et al. (2017), substantial research on organizational recruitment suggests that social network ties between employees and outsiders play a crucial role in promoting recruitment and facilitating membership growth. Yanchus et al. (2017) found that reasons for leaving include incivility, lack of autonomy, perceptions of unfair treatment, and feeling psychologically unsafe at work. Organizational change affects personal motivation, self-realization, and identity perception; therefore, concentration on otherwise-oriented work values increases change engagement and maintains long-term loyalty (Kolbergytė & Dromantaitė, 2022).

Predictors of high staff turnover include insufficient pay, job satisfaction, training, supervision, burnout, and lack of support (Sulek et al., 2017). Other factors related to employee retention include work environment and organizational culture concerning job transparency, staff perceived sense of value, work–life balance, and perception of leadership support (Graham et al., 2017). Satisfaction literature overlaps with fairness and justice literature, just as happiness literature overlaps with satisfaction because unfairness and injustice reduce satisfaction, according to Gevrek et al. (2017). Job satisfaction has been linked explicitly to turnover intentions, which can be reduced by addressing dissatisfaction with organizational measures and treatment of employees by administrators (Gevrek et al., 2017). Implementing procedures will increase job

satisfaction, motivation, and productivity of individuals and organizations, reducing employment problems, absenteeism, and employee turnover (Al-Suraihi, 2021).

Given the presenting issues of the target population in behavioral healthcare and the range of services offered, maintaining adequate staffing levels is imperative for the organization's overall functioning and sustainability.

### **Leadership Succession Planning**

According to Ballaro and Polk (2017), there are two parts to a succession plan: a plan to select the right people and a process to retain, promote, and train the appropriate people to fill a new position. Succession planning is essential for retention and reducing turnover. Chang and Besil (2021) studied healthcare leaders in Havana to determine how they prepare for the next generation of leaders through leadership succession programs. The study analyzed three critical factors influencing succession planning: organizational awareness of the necessity of succession plans, labor market conditions to deliver qualified candidates, and conducive learning environments (Chang & Besil, 2021). The study addressed the importance of the healthcare system developing succession planning strategies. Behavioral healthcare organizations benefit from the purposeful identification, mentoring, and training of staff in preparation for management and leadership positions (Dawson, 2020).

A succession plan is a series of steps outlined in an organization to promote employees and continue the business (Wright, 2021). The purpose of a succession plan is to outline the proper steps for an organization to continue fulfilling its mission and staying in business by selecting qualified human capital (Ballaro & Polk, 2017). Creating

succession plans is best for incorporating organizational structure, people-oriented workplace culture, initiative-taking HR management plans, restructured medical management, and innovative and transformative leadership programs open to all health professions (Chang & Besil, 2021). Al-Suaidi et al. (2020) found that succession planning strategies, organizational culture, and leadership development opportunities were the most significant factors linked to executive succession planning. Aside from the apparent benefits of planned change, it is also essential to discuss the business benefits. Having a continuity plan in place could help a behavioral health organization maintain its reputation with clients if a disruptive event occurs, such as a loss of leadership (Dawson, 2020).

Strategic succession planning is essential for organizational survival, business continuity, competitive advantage, and profitability, according to Al-Suaidi et al. (2020). It enables organizations to reach their goals by assuring the availability of suitable talent to meet the challenges of turbulent business environments (Alvani et al., 2016). Organizations have moved away from classic replacement planning to an approach involving internal talent development (Gothard & Austin, 2013). Mey et al. (2021) discovered that retention of engaged and knowledgeable employees requires leaders who can support them with a sense of belonging, respect, empowerment, support for their personal growth and development, and flexibility and freedom in executing their duties. Developing leadership legacies requires the organization's climate and culture to be flexible, open to new knowledge from the environment, and adaptive to change.

Recently, organizations have experienced the need for leadership succession plans more frequently because top leaders' average tenure is shortening (Farah et al., 2020). While planned leadership successions can lead to more straightforward transitions and may have minimal or even positive impacts on post succession performance, unexpected changes can shake organizations hard, according to Farah et al. (2020).

Formal succession planning strategies and programs can provide skilled and knowledgeable internal candidates to fill critical vacancies. However, 70% of healthcare organizations do not offer succession planning programs (Martin & O'Shea, 2021). Development and implementation of succession planning for various leadership levels can offer the organization stability.

### **Organizational Culture**

According to Wright (2021), several factors such as organizational culture and climate, work environment, relationship with supervisor, values, age, stress, and exclusion from decision-making contribute toward an employee's turnover intention. Culture is complex and full of distinctive spiritual, material, intellectual, and mental aspects that describe a society or social group. Mehrtak (2017) stated that organizational culture is a collection of assumptions, values, and beliefs adopted and interpreted by an organization's members that represent the values declared by the organization and its members. Wright (2021) stated that successful organizations usually have strong and unique subcultures; the successes themselves contribute to the company mythology, reinforcing the subculture. Unsuccessful organizations have weak, indifferent, or old subcultures that become sclerosed and can prevent the organization's adaptation to

changed circumstances. Leadership that maintains a culture sustains cultural continuity through the continued viability of a culture's substance, including ideologies, values, and norms (Valentine, 2012). Succession planning ensures that as leadership transitions from one leader to another, the change will be seamless, and the organization will be able to survive and thrive. Organizational culture plays a vital role throughout a business and is often linked to the failure of change initiatives within a company (Wright, 2021).

In residential treatment programs, it is necessary to operationalize strategies that improve the clients' treatment outcomes. Practices that affect positive change in the client population are essential when developing retention strategies. Therefore, leaders must create a social climate for the staff and adolescents that promotes interpersonal connections, support, safety, and respect (Lanctot, 2016). As previously stated, frontline workers in residential treatment settings are at risk for workplace violence perpetrated by clients and secondary trauma. Due to funding shortages, wages are often low in behavioral health; therefore, leaders can recognize work through nonmonetary rewards (Kadi, n.d.). Employees in these settings may improve their job satisfaction when they understand that their work efforts are appreciated. Although many of these workers present selfless characteristics, rewards and recognition, comprehensive benefits packages, and flexibility may counteract the negative influences enforced by their challenging work setting. Singh (2019) found that incorporating retention strategies to include rewards, recognition, and flexible work schedules reduces employee turnover and improves work–life balance. Additionally, strategies that provide opportunities for

professional development and career advancement are attractive retention strategies that influence staff longevity (Singh, 2019).

### **Organizational Development Strategies**

Organizational change should generate an enlightening environment that creates incentives for corporate growth and incorporates personal and professional skills development with a conscious understanding of perceptions related to work (Kolbergytė & Dromantaitė, 2022). These perceptions are important for understanding why employees leave a job or stay. Poor workforce retention, mental health, and well-being are pressing concerns within behavioral healthcare and are known to be associated with each other (Turley et al., 2022). Organizational growth focuses on three goals: productivity, connection, and self-realization (Kolbergytė & Dromantaitė, 2022). There are multiple reasons why behavioral health workers are particularly vulnerable to adverse outcomes and turnover. These include high work demands, ineffective bureaucratic structures, and little opportunity for advancement (Turley et al., 2022). The role also occurs within rapidly changing policy and subsequent role uncertainty. Literature that comprehensively analyzes growth opportunities considering administrative, social, emotional, and spiritual aspects is lacking (Kolbergytė & Dromantaitė, 2022). The challenge lies within the knowledge and skills of organizational leaders and empowers the entire organization to complete its mission, reach its vision, and compete successfully in an environment that constantly changes.

Prabowo et al. (2020), explained that to demonstrate excellent and stable organizational governance, stakeholders must immediately improve quality and

professionalism to create competitive advantages and uphold corporate ethics to provide quality services that consumers expect. Stakeholders must encourage sustainable and consistent human resource development programs. Human resources connects management with strategic roles and objectives to improve business performance, develop organizational culture, and foster innovation and flexibility (Prabowo et al., 2020). From the aspect of the strategic thinking of an enterprise, Tan, and Xu (2015) pointed out that the change of organizational "resources" to replace traditional "products" would gradually transfer the basis of strategy making from external "industrial competition analysis" to "resource-based view" intrinsic capability. Ranjan and Read (2016) described resource-based strategic logic as the combination of the application of core competence and current businesses to be the motive of new business development. The organization is consistently researching new evidence-based treatments for clients and additional training for staff to keep the organization in competition with other behavioral health organizations.

### **Sources of Evidence**

The following sources of evidence were used to support the research. Semi structured interviews with individuals holding leadership positions within BOHA allowed pertinent data to be gathered. Interviewing senior management identified how their leadership vision aligns with the organization's vision. Through the interviews, I aimed to understand the leaders' perspectives and experiences regarding staff retention and turnover. The interview questions were designed to enable an inquiry-based conversation. Through these conversations, I gathered specific information regarding the focus of the

study, as well as gained the leaders' experiences through open-ended questions to stimulate dialogue (Castillo-Montoya, 2016). Standardized, open-ended, and conversational interviews were created to be relevant to the study.

Secondary sources for review included the organization's strategic plan, personnel policies, organizational charts, organizational policies and procedures, and leadership meetings. These documents provided insight into the organization's ongoing retention strategies and barriers. Additionally, leadership meeting minutes were reviewed to describe the thoughts expressed by the leadership team regarding the needs, culture, and attitude toward employees.

### **Leadership Strategy and Assessment**

Top talent remains the primary source of organizational competitive advantage. According to Michelle et al. (2021), studies reveal that managers' leadership behaviors influence employees' intentions to stay or quit. The capacity to attract, motivate and develop talent and retain high-performing employees is imperative for organizations to thrive in today's dynamic and complex behavioral health world (Michelle et al., 2021).

BHOA is a for-profit organization. The governing board includes the president/CEO, chief medical officer, chief operating officer, chief financial officer, chief counsel, vice president of clinical services and quality management, vice president of marketing and sales, vice president of HR, vice president of diversity equity and inclusion, president of substance use and eating disorder divisions, president of mental health division, president of medical program, and senior advisor to the CEO. Each division, mental health, eating disorder, and substance abuse, have a separate



organizational structure. (See Figure 1 for the mental health division organizational chart). The governing board concludes all decisions regarding operations, policy, and procedures in collaboration with the professional staff. Decisions are made and shared throughout the organization. Communication flows through meetings, and information is distributed to approximately 3000 employees through various means such as team meetings, program meetings, individual and group supervision, organization-wide memos, and email announcements. With many senior leadership members working remotely, clear, concise, and consistent communication between the corporate office and the treatment facilities is critical for organizational success.

When drafting and executing an innovation strategy, an organization should first measure the internal and external environment and business objectives and consider the organizational resources to recommend a proper coping strategy (Pai-Chin et al., 2019). The term sustainable development (SD) was coined to describe an ideal aspirational model of growth that would not compromise the ability of future generations of leaders to meet their needs (Pinelli & Maiolini, 2017). Research has highlighted that a sustainability plan, the set of all the actions and strategies that an organization designs to impact social-environmental challenges positively, often lacks strategic thinking and thus turns out to be ineffective and inadequate (Pinelli & Maiolini, 2017). Interviews with senior leadership of the BHOA provided additional information on how the organization creates and implements strategic growth and development plans.

## **Client Population**

BHOA provides mental health, substance abuse, and eating disorder treatment throughout the United States. The organization includes over 130 recovery centers along the Pacific coast, from California to Washington, throughout the Midwest and southwest, and at various points along the Atlantic, from Florida to New England. The West coast carries a larger clientele as this division has been open the longest. The East coast is catching up quickly by expanding their programs. Differences in state regulations play a role in employee burnout as the ratio in one state may not be the same ratio in another. For example, the ratio in Florida for a residential program is 1:4, however, the ratio in California is 1:6. When there are more clients than staff, the work environment becomes more stressful.

The BHOA offers many programs, including outpatient, partial hospitalization, intensive outpatient, and residential care for adolescents and adults. According to the BHOA's website, the organization's mission statement is: "We save the lives of those we serve with compassionate treatment, evidence-based clinical care, and an unwavering alliance among staff, patients, their families, and communities." The average length of stay for the organization's residential programs is between 35 and 45 days. Most residential programs hold between 6-12 patients. However, the organization is expanding to larger programs that house between 25-90 patients. The organizations' goal is to help as many individuals as they can.

The organization abides by the ACCESS model, which stands for Accessibility, Clinical experience, Compliance, Equality, Safety, and Superior Outcomes. ACCESS is

at the core of the organization's value system. Making behavioral healthcare accessible to all is a theme that informs decisions and shapes the culture. Access to behavioral healthcare means a happy, rewarding life can be a reality for everyone.

Children and adolescents admitted to outpatient and residential settings experience severe mental health and substance-related diagnosis. Recipients of services are adolescents ages 11-17 and adults over eighteen with mental and behavioral diagnoses, eating disorders, and substance-related diagnoses. Specialized treatment programs include cognitive, emotional, behavioral, eating disorders, trauma, and substance abuse. There are clients who also have traumatic experiences such as physical and sexual abuse, neglect, and abandonment issues according to the organization's website.

Overall, the organization has positive treatment outcomes. According to the BHOA website after treatment, 90% believe they can manage what happens in life, 92% believe they can meet their personal goals, 92% feel hopeful about the future and 95% have a plan for how to stay or become well.

### **Workforce and Operations**

Each branch consists of a president, vice president, and CEO for each region, with the president and the board coming first in the chain of command. Under the CEOs are executive directors, program directors, facility managers, and staff at each program. The president and vice president must have master's degrees and a strong background in mental health treatment and business operations. Corporate and program leadership must be licensed in their respective states to practice mental health counseling, social work, or

marriage and family therapy. The executive directors, program directors, and therapists must also be licensed to practice social work or mental health counseling. The mental health technicians (MHT) are with the client 24 hours a day in residential treatment and 8 hours a day in outpatient treatment. The MHTs must have at least one year of experience in a mental health setting or a bachelor's degree.

Each employee receives specialized training for their role within the organization. Training programs such as conflict resolution, boundaries, and effective milieu management, overlap for employees to work together and provide a safe and therapeutic environment for each client. Each employee is equipped with a specialized employee manual and an extensive training checklist. The employees are also offered additional professional development opportunities to gain knowledge and skills and receive a raise for completing these courses. The courses offered are certifications in Cognitive Behavioral Therapy, Acceptance and Commitment Therapy, and Dialectal Behavior Therapy. In the local program, the staff-to-client ratio is one to four. If there are staffing concerns, this ratio can be challenging to maintain; however, it is required. Given the severity and acuity of the patient's mental health, the workload can be overwhelming even with these minimum ratios. Based on employee survey feedback, the workload contributes to employee burnout and turnover.

### **Analytical Strategy**

A qualitative case-study research design was used for this doctoral study because qualitative data provides rich personal information about participants and their individual experiences in a way that quantitative data-collection methods can only do categorically.

Personal interviews and secondary data were analyzed. Interviewing senior management provided an opportunity to identify the leadership's vision and how it aligns with the overall organizational vision.

### **Role of the Researcher**

Qualitative research acknowledges that neither the researcher nor participants are blank slates (*tabula rasa*); therefore, they bring their unique flavors, viewpoints, perspectives, and biases into the research relationship (Raheim et al., 2016). The constructivist view explains that meanings are extracted from experiences so that individuals construct subjective meanings of objective realities (Raheim et al., 2016). In this study, the researcher assumed the role of scholar-consultant. The researcher's priority was protecting privacy, minimizing harm, and respecting shared experiences while recognizing each participant as an expert on their own practices.

As a scholar-consultant, the researcher was aware of the potential for reflexivity, an awareness of how a researcher's presence can impact research (Ravitch & Carl, 2016). As the scholar-consultant, and a part of this doctoral study, it is recognized that subjectivity is possible because of human nature. The scholar consultant had the responsibility in adhering to qualitative research best practices throughout the development of the study design, methods, and analysis.

### **Data Collection**

Qualitative research aims to understand why people act, think, behave, and feel the ways they do and often explores participants' perspectives in a study (Hammarberg, Kirkman, & de Lacey, 2016). As the primary data-collection instrument, semi structured

interview questions were developed (see Appendix) and aligned with the research questions to encourage leaders to understand their perceptions and viewpoints better. An interview guide was created for the semi structured interviews that were recorded.

Handwritten notes were completed to document essential information, clarify information, and indicate necessary post-interview follow-ups. The interview method provided specific insights into the individual beliefs and motivations and captures real-life experiences (Hammarberg, Kirkman, & de Lacey, 2016). The interview method offered flexibility, as these interviews could be completed via Zoom videoconferencing. It is cost-effective and reduces geographical obstacles (Archibald et al., 2019).

Before starting the interview process, the BHOA's vice president was asked for permission to interview executive and program leadership to gain access to current and historical corporate information. The interviews were transcribed when completed. Copies of the interviews were returned to the interviewees for a member to verify the validity of the information. Qualitative data analysis was conducted by developing codes using open coding. Manual coding allows data to be organized into similar themes, relationships, and pattern folders. Data themes were identified by paying attention to phrases and word repetitions from interviews with senior leaders. The data was then summarized to link the findings to the research topic. This research aimed to recommend procedures for effective succession plans in behavioral health facilities and organizational development strategies to improve employee retention.

Four interviews with BHOA leadership members were completed. The interview participants included the vice president of operations and military services, vice president

of operations, executive director of programs, and milieu manager. A variety of organizational documents were retrieved and reviewed. Secondary data were also collected from various sources, including public data sites, peer-reviewed journal articles, and books related to the research questions. Additional information was retrieved regarding operational effectiveness based on staff turnover issues. Each participant was asked core questions. (See Appendix.)

The initial point of administrative contact for this study, the Mental Health Division President, identified the organizational problem and provided the appropriate BHOA contacts to obtain corporate documents. The senior leadership team shared the case study requirements, goals, time limit, and process and approved the case study as presented.

### **Procedures**

As a researcher, I ensured the doctoral study was conducted ethically, protecting the qualitative research's credibility, participants, and the BHOA. I used qualitative ethical best practices to develop the research design, method, processes, and analysis. Additionally, I provided the BHOA with documents in preparation for the study, including the approved prospectus that describes the study, model, and framework to be used. This study is designed with me fulfilling the role of a scholar-consultant to explore the approved practice question and make recommendations based on primary and secondary data results. I presented the doctoral study, prospectus, signed forms, and application to collect data to Walden University's IRB before any data were collected, and they were approved. The IRB then provided an informed consent letter that I sent to

each interviewee with a request for them to reply with "I consent." I maintained participants' anonymity throughout the doctoral study, as the BHOA has been de-identified; the state location was masked, and individual participants' names were omitted and kept confidential. This strategy created a trusting relationship between me and BHOA, which was vital for obtaining sensitive organizational information for this doctoral study.

### **Minimizing Harm**

Several efforts to minimize harm are present in the research design. The IRB reviewed the proposed research prospectus, ensuring ethical processes will be followed and provided the steps taken to minimize or eliminate potential harm to participants. I obtained informed consent from interview participants and anyone else involved in providing data for the study.

### **Respecting Shared Experiences**

Everyone is an expert in their own experiences (Ravitch & Carl, 2016). The researcher was aware of personal biases and opinions and kept them separate from the data collection and analysis, remaining mindful that each participant contributes their wisdom and knowledge to the research (Ravitch & Carl, 2016). The participants were allowed space to share their own experiences and perspectives without being judged or compared to the researchers.

### **Summary**

Organizational retention issues are widespread throughout the behavioral health industry. There is considerable research on retention issues and factors contributing to



staff turnover in the human and social services fields. Employee retention in residential settings is limited, research consistently shows a problem. Several factors impact staff turnover in behavioral health treatment settings. Issues related to burnout among this population are substantial. These issues are related to organizational growth and retention strategies implemented by leadership. Research shows that organizations can retain employees and grow through effective succession plans and professional development.

In section 3 I analyze workforce operations and engagement strategies to ascertain how BHOA creates an effective and supportive work environment conducive to a high-performance work environment. Section 3 describes how BHOA designs, manages, and improves its critical services and work processes. Information was synthesized to inform how the organization measures, analyzes, and improves organizational performance. Furthermore, the section will evaluate BHOA's utilization of knowledge assets, information, and information technology to enhance retention and succession plans between employees in residential treatment settings.

### Section 3: Measurement, Analysis, and Knowledge Management Components of the Organization

Researchers have continued to explore why employees voluntarily leave their jobs (Rubenstein et al., 2018), and managers continue to focus on employee retention issues (Belbin et al., 2012). Personnel separations can disrupt patient services, decrease business performance, affect the organization's competitive nature, increase the workload for remaining employees, exhaust the employee pool, and result in a turnover domino effect (Lee et al., 2018). Staff retention is critical for organizational performance and growth in behavioral health. Mental health technicians and therapists are vital for individual programs and corporate sustainability. They are often seen as frontline workers, or the face of the organization, as they have more direct contact with the clients and families than any other position.

Whether incremental or organization-wide, an effective change process follows a sequence of events (Johnson & Rossow, 2019). Depending on the scope of the change initiatives, the process can be challenging to organize and explain. This study examined the current techniques and strategies of organizational development that BHOA leaders have explored to improve retention rates. According to Johnson and Rossow (2019), the action research model represents a philosophy of change that incorporates employee participation, engagement, and empowerment into the change process. Understanding how corporate growth and development impact retention and the existing gaps can help BHOA leaders identify opportunities for increased retention among the frontline staff. Therefore, examining turnovers could provide valuable knowledge for BHOA leaders to

improve retention rates, which can help in accomplishing organizational goals and fulfilling the mission.

There are not enough behavioral health professionals within the organization due to turnover, which is related to higher operational costs, workload, burnout, and decreases in the safety and quality of patient services (DeCapua, 2016). The goal is to retain employees, even during times of organizational change.

Through the study, I assessed and described the BHOA's current retention practices, identified performance gaps, and emphasized improvement opportunities developed from academic literature. Low employee retention affects an organization's ability to accomplish its mission and goals (Chowdhury & Nazmul, 2017). Employee turnover leads to financial costs for replacing staff and a reduction in the quality of services for customers (Homisak, 2022).

Data collection involved a review of scholarly, peer-reviewed journals; statistical data; interviews; and organizational documentation. This information included best practices for retention and factors contributing to high turnover rates in residential settings. Leadership team members with expert knowledge regarding the practice problem were selected to share their perspectives on BHOA's growth and development and the organization's retention strategies. The executive leaders' approval of organizational documents for review also supported the study. Further, their website comprehensively describes BHOA's history and services. The public information on the website targets adolescents and their families, external stakeholders, and stakeholders according to the organization's website.).

## **Analysis of the Organization**

### **Workforce Environment**

Most workforce engagement and retention strategies affect employees, labor productivity, and company performance (Rombout & Guerry, 2019). Staffing and recruitment are the primary function of BHOA's HR department. The HR and recruiting team manage all staff and ensures that all programs are fully staffed with regular and direct care staff (Participant 1). BHOA leaders are working to improve recruitment, staffing, and retention efforts (Participant 1). Participant 1 stated that "retention rates across the divisions are below the threshold of what we would like to see."

There are several factors that the BHOA leadership has mentioned as contributing to high turnover rates, such as work environment, patient acuity, and low wages. Mental health and behavioral health treatment are complex, the patients are challenging to work with at times, and there continues to be a nationwide shortage of employees. BHOA leaders acknowledged that they play a large part in the workforce environment. The leadership is responsible for taking pride in employees, showing empathy, and encouraging self-care. The administration acknowledged that they must be the ones who are steady during times of crisis. Consistency with supervision and care helps to create an environment of encouragement and support, which, according to the last employee survey taken in April 2021, was lacking at both corporate and program levels.

The BHOA advertises competitive salaries and a comprehensive benefits plan, including group health, dental, vision, life, and disability insurance; a matching 401K benefits plan; and an employee assistance program, on its career page. Electronic

recruitment and marketing methods include BHOA's website, Indeed, Glassdoor, and social media sites (i.e., Facebook and LinkedIn). Additional strategies include the BHOA employee referral bonus program.

Effective leadership style and communication practices are essential components for BHOA to ensure that workforce operations and engagement strategies are efficient, inclusive, and supportive of the employees. Participant 1 explained the communication process and employee engagement strategy: "It transcends downward from monthly Town Hall meetings led by the CEO to the program administrators, who should also be having those meetings, in which they are reiterating their vision and organizational goals."

To establish an effective and supportive workforce environment, various BHOA leaders described a team-based approach to improve organizational performance, as teamwork is necessary for effective implementation. Teams can involve as few as two people (Salas et al., 2015). When necessary, BHOA leaders develop small groups of subject matter experts to explore solutions for critical problems within the workforce. The teams are tasked with brainstorming strategies, sharing ideas, inviting the right people to the table, listening, engaging in generative dialogue, surveying, implementing new systems, and pouring information throughout the organization. Such teams include operations, recruitment, staffing, and diversity inclusion.

Performance improvement strategies are also essential to the workforce environment, ensuring safety and quality services to achieve a high-performing workforce. The director of risk management is responsible for developing

interdisciplinary functional teams to implement, monitor, and evaluate the safety and quality management program. The teams' responsibilities include, but is not limited to:

- implementing ongoing monitoring of all corporate and facility activities related to safety, risk management, therapeutic environment, and infection control
- implementing and monitoring facility activities to correct safety and risk problems identified through data management or other channels
- conducting the annual hazard vulnerability analysis
- assisting in the development of departmental rules and practices concerning safety and quality
- providing various surveys designed to elicit feedback from staff, patients, and stakeholders regarding the quality of care, and utilizing the feedback offered to improve the overall quality of care
- conducting regular reviews and analyses of risk management reports involving residents, employees, or visitors and making corrective action recommendations
- assisting with the design and implementation of employee training and orientation
- establishing and implementing a schedule for safety and risk inspections

One of BHOA's critical work processes is ensuring the appropriate staff-to-resident ratio. Milieu programs must maintain a minimum of one staff person for every four adolescents (Agency of Health Care Administration, 2022). The staffing patterns for

specific states come directly from the state's licensure board. Participant 1 reported that the recruitment and staffing team was recently restructured to include operations to look at the workforce environment. The group explores innovative strategies to reduce overtime expenses and direct and indirect costs incurred due to high attrition rates. Strategies to improve retention are also discussed among the recruitment and staffing team.

### **Leadership Engagement**

Background leadership is critical in building quality work environments, implementing new models of care, and bringing health and well-being to a strained workforce. Several factors play a role in what the workforce environment looks like, such as (a) staff satisfaction with job factors, (b) staff relationships with work, (c) staff health and well-being, (d) relations among staff, (e) organizational environment factors, and (f) productivity and effectiveness. Cummings et al.'s (2018) systematic review found dedicated support for the employment of relational leadership styles to promote a positive workforce and related organizational outcomes. Leadership focused exclusively on task completion is insufficient to achieve optimal results for the behavioral healthcare workforce. Relational leadership practices need to be encouraged and supported by individuals and organizations to enhance job satisfaction, retention, work environment factors, and individual productivity within healthcare settings (Cummings et al., 2018).

BHOA embraces technology as a valuable tool to enhance communication within an ever-changing work environment according to the organization's website. Each employee is provided with an email address to ensure proper communication between all

levels of the organization. Core staff, such as therapists, nurses, and facility management, can access a ring central phone number where they can be directly reached. Employees also have access to the company's intranet site to ask questions to individual departments and get answers there (Participant 4). The employees submit their questions and are assigned a ticket number for follow-up. There is also additional information and resources for the employees on the intranet.

Healthcare organizations can implement some critical changes quickly to enhance the work environment, improving care quality and safety, patient satisfaction, and the well-being of employees. These institutional changes also create opportunities for improving the organization's health. Analysis of survey data found that improving professional development, flexibility, work-life balance, safety, team engagement, and organizational response to workplace violence can create a healthier workplace (Edmonson et al., 2021). These are known solutions that have yet to be fully engaged at the BHOA. The organization has implemented monthly surveys for the employees to gain feedback and identify areas of improvement and places where the programs excel. This survey, in turn, provides additional resources and training for individuals to create a healthier and safer environment for employees and clients.

Organizational support for education, training, and other professional development is necessary to maintain and improve healthcare quality. Edmonson et al. (2021) discussed that support for professional development is connected to higher career and job satisfaction among healthcare workers, a better ability to provide quality care, and a greater likelihood of remaining at their current jobs. For example, according to



Edmonson et al. (2021), 52% of nurses who work at organizations that do well at supporting professional development are also satisfied with their jobs. Of those who work at organizations that do not do well at supporting professional development, only 7% are happy with their jobs.

BHOA leaders recognize the importance of the workforce in achieving the organization's mission and vision (Participant 1). The organization must meet and maintain staffing requirements for licensure, its accreditation body, customers, and stakeholders. Participant 1 reported that the organization had implemented a division orientation after the standard HR orientation, which they believed would help provide an overview of the division for the employees to understand the mission better. The organization had created 30-, 60-, and 90-day check-ins for entry-level positions, allowing the managers time to review employees and discuss how well they were doing and what they could improve on, how they fit in with their peers, and how much more training they needed. Participant 1 shared that the data and statistics had shown that at least 50% of the turnover happens within the first 90 days. Therefore, setting those check-in points will be immensely helpful in developing effective retention strategies and succession plans.

### **Workforce Engagement**

The existence of disengaged employees can reduce productivity and increase organizations' costs. Engaged employees are vital to many organizations and the success of organizational leaders (White, 2020). Workforce engagement has been defined as the aggregate of the work engagement experiences of individual employees in an

organization (Schneider et al., 2018). In the second quarter of 2022, the organization administered an employee satisfaction survey to assess the employees' perspective on BHOA's performance, culture, leadership, and relationships (Participant 2). The 2022 survey results were shared electronically with program leadership, who then relayed the results to program staff. Based on these results, the organization took several actions to find immediate solutions and work on long-term solutions. Several items on the improvement list were access to electronics, day-to-day job tools and training, increased vacation hours, better insurance rates, and more diversity inclusion projects. Results on management included employee support, engagement, work-life balance, job satisfaction, relations with peers, and professional development.

Schneider et al. (2018) found that company organizational practices, supervisory support, and work attributes link significantly to workforce engagement. However, workforce engagement intercedes in the relationship between engagement and performance metrics. The organization recently sent an updated, shortened version of the previous survey to determine where improvements were made and whether continued enhancements are still needed. These results were analyzed and shared again with program leadership and throughout the programs. In addition to surveys, BHOA promotes staff engagement by using suggestion boxes, the intranet to send specific departmental questions, "an open-door policy for people to bring their ideas to us," and rewards and recognition (Participant 1). The BHOA recognizes employees at the program levels by having employees nominate their peers for a job well done and vote for the

employee of the month. The organization acknowledges employees through town hall meetings, Teams chats with specific regions, and emails from the CEO.

The program director monthly facilitates all staff meetings. Employees receive the required training, special recognition, and awards during all staff meetings. Employees are encouraged to use this time to share their thoughts with the Program Director.

Additional training and staff development are offered during all staff meetings. This time is also utilized for open discussions and questions on programming and organizational changes or concerns.

Organizational leaders with a strategic plan can help create a pleasant, safe, productive, and engaged workforce. Albrecht et al. (2015) identified employee engagement as a critical mediator between human organizational attributes such as climate and culture, HR practices of all kinds, such as high-performance work practices (HPWP), and individual, team, and organizational performance. According to Schneider et al. (2018), when employees at a company work on tasks in which they are fully engaged, these companies are more likely to be effective. Efforts to measure organizational practices include the communication of organization goals, performance feedback practices, and perceived fairness in the treatment of people (Schneider et al., 2018).

### **Knowledge Management**

According to BHOA leaders and document reviews, many strategies are utilized to improve retention. Knowledge is shared throughout the organization through formal leadership meetings and small task teams. Personal communication with BHOA leaders

unveils similar perceptions regarding the workforce environment and engagement strategies. Best practices, such as surveys and reward programs, are implemented to engage employees. Surveys are administered to measure employee satisfaction and desires in the workplace. By implementing processes established by BHOA's accreditation entity, The Joint Commission. BHOA utilizes valuable tools such as ORIGAMI, a critical incident review process to assess, analyze, and improve organizational performance outcomes (Participant 2).

According to participant 1, the BHOA has implemented various strategies to invest in its employees and reduce turnover rates. However, the BHOA does not have assessment strategies or evaluation plans to clarify if BHOA's engagement strategies have impacted retention rates (Participant 2). Previous surveys produced organizational changes resulting from employee feedback, such as changes in benefits, paid time off, and providing valuable tools at the program level to perform their job requirements more effectively (Participant 1). Exit interviews are not conducted when an employee leaves voluntarily. Exit interviews could be a valuable tool for insight into why employees leave. Exit interviews could provide insight if the employee is resigning due to the specific program they are working at or if it is an organizational problem. However, according to Participant 4, exit interviews have not been administered or tracked consistently to provide a well-informed representation of the experiences that resulted in a voluntary resignation.

Furthermore, Participant 2 explained that obtaining good data may be difficult because the individuals who make decisions impacting employees work from the

corporate facility and do not interact with direct employees consistently. Effective communication is a critical component of behavioral health residential settings due to the environment's complexity (Participant 3). BHOA incorporates technology as the primary platform for sharing knowledge and information with its employees. Other modes of electronic communication have been employed to ensure employees receive essential information, such as TEAMS and RingCentral.

### **Summary**

BHOA has multiple operational and engagement strategies to improve employee retention but has a less robust system for measuring the impact of these strategies. The executive director recommends a participatory leadership style that research has reported as effective and efficient for engaging employees (Banjarnahor et al., 2018). The organization has many informal control strategies and processes to convey information through smaller teams and groups that provide a dialogue platform. Company-wide communication is conducted in person and electronically.

In Section 4, I analyze several components relevant to the practice problem. Based on the sources of evidence, I analyzed BHOA's client and workforce-focused results. An analysis of BHOA's leadership and governance results related to organizational development and succession planning with employees was completed. Section 4 will also include an interpretation of the case study's results, implications, strengths, and limitations.

#### Section 4: Results: Analysis, Implications, and Preparation of Findings

This qualitative case study was designed to understand BHOA leaders' experiences and practices related to growth, development, and succession planning for the organization. BHOA leaders identified a problem with retention and succession planning. Data connected to the practice problem were collected from academic and professional literature, public data sources, and related websites. Public data sources, including peer-reviewed journal articles, were accessed through numerous databases and search engines. BHOA leaders supplied internal documents as requested to understand BHOA's practices and processes that affect growth and development:

- employee turnover report
- policies and procedures
- recruitment and staffing procedures
- budget and census data
- organizational structure and hierarchy charts
- client and employee survey results
- performance improvement plan
- job descriptions and salary structure
- personnel policies

Semi structured, open-ended interviews were conducted with four BHOA leaders, creating flexibility and a greater understanding of their experiences and feelings (Austin & Sutton, 2014). Participants were referred to as Participant 1, Participant 2, and so on to

keep confidentiality. The interview participant choices were influenced by leadership role and expert knowledge of the practice problem.

The individuals chosen to participate in the study were from the corporate office and a local program. Participation options, such as face-to-face, a virtual platform, or by phone, were offered. The interview participants included the vice president of operations and military services, vice president of operations, executive director, and program milieu manager. The interviewees were asked questions according to the participants' roles in the organization (see Appendix). Zoom interviews were set up, recorded, and transcribed via the Zoom application. The transcriptions were separated into four Microsoft word documents to compare the interviews manually.

The following section provides the results of the data analysis. The potential implications of the findings are discussed, and the study's strengths and limitations are reviewed. The potential for positive social change resulting from the study is also explained.

### **Analysis, Results, and Implications**

Organizational documents such as employee satisfaction surveys, pay scales, and resignation data clarify the problem's depth. Lastly, public data and scholarly peer-reviewed literature highlighting best practices for retention in residential treatment programs were assessed. Using the Baldrige Framework of Excellence (2021) as a guide, a review of the BHOA's workforce results, climate, engagement, and development of organizational growth and succession planning was completed. The Baldrige Framework

guided the creation of the interview questions and areas to focus on within the organization.

### **Data Analysis**

After completing the data collection process, the data from the interviews were entered onto a Microsoft Word document and manually coded using open coding. Open coding is a type of coding that does not rely upon a preconceived set of codes, but rather is open to the analyst using whatever codes seem to best work for the data being analyzed (Glaser & Holton, 2004). An additional manual review of the interview transcripts, employee surveys, policies, and literature were completed to identify the frequency of keywords and phrases. Frequently used words such as *training, leadership, change, organization, succession, and retention* were found among the respondents. These key words and phrases helped to identify common themes from each interview transcription. See Figure 2. Notes taken from the discussions and secondary data (i.e., policies, budgets, census reports) were used to maximize the value of the information found in the study.





The data suggests that the organization's setting is not supportive of its current employees and does not encourage their growth and development beyond basic training. The results also indicate that the behavioral health organization does not have effective succession or retention plans. According to Participant 2, the organization “has tried everything to retain employees” without success. Retaining employees and succession planning are crucial to the continuity of the comprehensive vision of a healthcare organization (Ellinger et al., 2014).

A thematic content analysis was completed, and triangulation was conducted to ensure validity. Emerging themes that answer the first research question are retention and environment. The themes that address the second research question are succession planning, growth, and development. Each theme narrows the data content to answer the research questions specifically.

### **Research Question 1: Correlating Themes**

RQ1: Does the organization create an environment that encourages learning, promotes patient and customer engagement and safety, and participates in succession planning for the development of future organizational leaders?

#### ***Emergent Theme 1: Retention***

Retention emerged as a dominant theme. Retention was the first part of the problem that the leadership reported. The data collected from participant interview transcripts, literature, and internal documents were compared to current retention and succession planning strategies. The interview transcripts and documentation suggest that the organization does not have effective current retention plans. Participant 4 stated that

“factors contributing to high turnover here would be the high-stress environment, lack of proper planning from higher management, and miscommunication from their peers.” In particular, the turnover rate at one location was 64% according to the programs performance indicators for August 2022. Most of these turnovers occurred among entry-level employees and therapists. The local program was found to have a turnover rate of 27% as of December 2022. The overall company goal is to have a turnover rate of less than 40%.

When one considers the overall impact of losing staff, the fiscal impact is only one measure. The emotional cost (stress, loss of productivity, patient flow disruption, job burden shifted to existing employees, etc.) is equally or more upsetting (Homisak, 2022). Stress and workload have been the most common complaints that the employees have. When their peers leave, it is one more burden they must carry.

Retaining strategies need to happen when the employee is still interested in staying. There are ways to keep the employee engaged, such as allowing personal autonomy, offering additional training opportunities outside of the norm, providing an environment that encourages self-care, and giving employees permission to create a fun working environment (Homisak, 2022). It is important for leadership to show interest in the employees as individuals. Other feedback from the employee surveys is that the employees want more individual feedback, rather than broad feedback for the team.

### ***Emergent Theme 2: Environment***

Environment emerged as a prominent theme addressing the first research question relating to the organization's environment. The data collected suggests that the

organization's environment lacks employee support and is not conducive to learning and growth. While the organization offers opportunities, those opportunities are not always communicated to the employees. Participant 2 reported that one way the organization can improve its environment is to “be transparent with employees as if they feel in the loop there is more acceptance of the change.” Organizational leaders are working to improve the culture by having a diverse staff, creating cultural committees to ensure that every culture is honored, conducting weekly safety walkthroughs of the facilities, and holding quarterly health and safety meetings. Edmonson (2021) found a correlation between employees who are satisfied with the organization and organizational support for diversity.

The BHOA sends monthly employee surveys on job satisfaction, management, peers, environment, workload, training, and support through Peakon. Survey results indicated that the employees did not feel recognized or rewarded for their efforts, were overworked, and desired more training. According to the Peakon survey, approximately 40% of employees did not think they had management support. 30% of the employees who participated in the last survey felt that they did not have healthy relationships with their peers. 30% of the employees did not feel they were an organizational fit. Forty-four percent reported that their workload was not manageable, and 27% believed that the organization’s strategies were not leading the company in the right direction and that there was no proper communication of the goals to the employees according to the 2022 employee survey.

Program leadership has been tasked with identifying goals to improve employee engagement. Examples of these goals are to increase employee satisfaction through better Peakon scores, increase employee engagement, introduce new training, and hold weekly check-ins with individual employees. The employees have said that they want to be heard and for their opinions to be taken into consideration more often. Leadership is meeting more frequently to brainstorm and think creatively to provide support, as employees are not just interested in monetary compensation. While a good wage is a key motivator in retaining personnel, it is important to keep in mind that its absence can (and does!) lead to dissatisfaction, which in turn can lead to inferior performance and discontent, followed by otherwise good employees resigning.

### **Research Question 2: Correlating Themes**

RQ2: What strategies or techniques can behavioral health leaders employ to establish a plan for leadership succession that encourages organizational growth and development?

### ***Emergent Theme 3: Succession Planning***

According to the leaders interviewed, the organization lacks effective succession planning. Programs are built into the HR data system; however, these plans are not utilized. While there are 30-60-90-day reviews and monthly employee surveys, the employees are not asked about their long-term career goals. Not discussing long-term aspirations could create an uneasy relationship between employees and their managers. Asking employees for their purposes demonstrates an interest in their personal goals and values. Participant 1 mentioned, “an organization cannot rely on one person, and should

not be as successful as only one person, and so as you grow your team, you grow the individuals. As a result, the organization grows and becomes more successful.”

Developing an organization to meet future needs includes a succession plan that supports employee development and talent management (Bollaro & Polk, 2017).

#### ***Emergent Theme 4: Growth and Development***

A common thought among the interviewees was that the organization lacked growth and development opportunities. The organization updated the training processes to improve its onboarding and training experience from day one. Participant 3 mentioned that the organization could improve “by remaining focused on patients and keeping them in treatment, providing training to support struggling staff, being available to employees when they need to talk or have questions, and attending weekly meetings with supervisors.”

The organization is growing as a company. They have expanded programs into the North and Mid-west. BHOA has combined eating disorder and mental health treatment for the clients to have access to more treatment in one place, rather than having to get treatment and then transfer somewhere else. The organization is adding more substance abuse programs for adults as well. However, due to staffing issues there are many programs who are on census caps and cannot accept a full census because there are not enough employees to provide treatment to the clients.

Career growth can be broken down into three factors, according to Shange et al. (2021), such as career goal progress, professional ability development, and rewards. Shange et al (2021) found that promotion speed was strongly related to compensation

growth. Previous research has shown that employees who observe strong career growth often reward the organization with a cheerful outlook, including low turnover intention and high job satisfaction (Shang et al., 2021).

According to the most recent employee survey, growth was rated at 6.4 out of 10. The company's benchmark is 7.6. This suggests that employees do not feel they have an opportunity for growth or feel supported in their career. Growth is a need shared by all individuals. A fulfilling job with adequate support and opportunities for growth helps satisfy this need. This enables us to feel that we are growing professionally.

Table 2 includes comments from the interviews related to environment, growth and development, retention, and succession planning. The interviewees discussed how low wages, lack of training, challenging jobs, complex client population, competition, and burnout could lead to lower retention rates.

**Table 2***Thematic Content Analysis: Organizational Growth and Development*


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Retention	<p>“Retention rates are low here. I think that is to be expected in this type of work environment. The largest position in this program is an entry-level technician position, which leads many people who want to experiment to see if this is the type of field, they would like to move forward in. Some learn that this type of environment is not for them.” (Participant 4).</p> <p>“So our retention rates in general, at this point, are not satisfactory. I would say that our retention rates across the division are below the threshold of what we would like to see. As I understand it, we employ many entry-level positions, and retention rates will never be at 0% just because people grow. They get additional education and opportunities, and they move on. I do think that there is much opportunity in that area to increase our retention rates and decrease our turnover rates.” (Participant 1)</p>
Environment	<p>“The environment is a high-stress environment, mental health patients are not easy people to work with at times, and so I think the high stress, and you know, and the worker shortage for sure throughout the entire country. That is impacting not only our organization. However, other organizations have led to worker shortages, meaning our staff is asked to work additional shifts over time.” (Participant 1)</p> <p>“Factors contributing to high turnover here are the high-stress environment, lack of proper planning from higher management, and miscommunication from their peers. On a more positive side, we have career goal-oriented people who wish to do greater roles such as becoming a therapist.” (Participant 4)</p>



Succession	<p>“This is highly important for not only the care of the employees and consistency for patients/customers but also the company. They have implemented various levels for each position within the company, almost like a track for growth opportunities. Leaders must complete a growth plan, know each of their employees' areas of interest, and support the employee in that growth.” (Participant 2)</p>
Growth and development	<p>When you look at things in totality, you can easily see the domino effect one change in the organization will have on other departments and disciplines. When you anticipate those dominos and get ahead, you can look at and include the people they will affect, so effective communication is throughout the change process.” (Participant 1)</p> <p>“A robust training system comprised of a live webinar with senior leaders, various home office departments, recorded training, and onsite shadow training.” (Participant 3)</p>

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### **Client Services**

BHOA is an organization that supplies mental health, substance abuse and eating disorder treatment to adolescents and adults. The organization’s primary functions are to deliver care that is easily accessible, no matter the barriers to treatment. Each program has an intricate role in ensuring these functions are performed effectively. Nevertheless, high turnover rates without effective succession and retention plans reduce the quality of care and treatment outcomes. Understanding BHOA’s current staff retention programs and finding opportunities to apply best practices to improve the retention of the employees at the facilities will enhance client services and BHOA’s overall performance.

Upon review of a local residential program, the services provided are individual, family, and group therapies using evidence-based approaches such as Dialectical Behavior Therapy, Acceptance and Commitment Therapy, and Cognitive Behavior Therapy. The program provides 24-hour residential care and has a census capacity of 24 patients, divided among 2 program milieus. The program provides various treatment services for male and female youth with significant psychiatric diagnoses. Table 3 describes the client services that the program provides.

**Table 3**

*Behavioral Health Organization A Onsite Services*

<b>Services provided</b>		
24-hour medical services	Medication management	Evidence-based services
Discharge planning	Multidisciplinary treatment	Comprehensive clinical assessments
Group and recreational therapy	Equine therapy	Psychological and psychiatric evaluations
Individual and family therapy	Education assistance	
	Crisis stabilization	

*Note.* Information from BHOA website.

The organization also offers partial hospitalization and intensive outpatient programs for those who may not need residential care. Similar services are provided at the outpatient programs, such as individual and family therapy, group therapy, medication management, clinical assessments, and discharge planning. Both residential and outpatient programs struggle to provide these services with the highest quality due to staffing. It is also a safety risk if program staff cannot maintain the required ratios. For

example, the ratio at the residential programs is one staff to four clients. The ratio is the minimum and does not account for clients who need close supervision due to suicidal thoughts, plans, or intent. In these cases, extra staff must supervise those individual clients and are not counted in the overall ratio. The programs need an entire staff team to maintain ratios and ensure all aspects of the program run smoothly.

### **Workforce Findings and Implications**

Residential treatment care has progressed in practice and policy and is now considered essential to the client's care system (Daly, 2018). This evolution has propelled extensive research of evidence-based and best practices in congregate care settings yielding numerous evidence-based milieu models, including trauma-informed systems, crisis intervention, and de-escalation. A milieu's safety, staffing, setting, and treatment outcomes are common core aspects of residential treatment that demonstrate quality programs (Farmer et al., 2017). Employees influence the program's culture, supplying clients with the safety to engage in treatment. If the employees constantly change, the culture changes and breeds distrust and uncertainty.

Turnover, planned and unplanned, brings stress to the facilities, employees, and clients. Participant 1 explains what factors may lead to a high turnover rate, such as increased stress, worker shortages throughout the country, and a lack of leadership support. According to Participant 1, "high turnover and stress affect our organization and other organizations, leading to worker shortages. Our staff is asked to work additional shifts over time, leading to tension within the programs. We need training in all levels of

leadership to hold that tension and not let it change the facilities and the employees there.”

BHOA leaders perceive poor attrition rates as an ongoing organizational problem that negatively affects various aspects of organizational performance. The common conclusion among all interview participants is that turnover is high in the BHOA and health care in general. Leaders described retention rates, similarly, suggesting a problem exists. Responses within the semi structured interviews reported that employee benefits, rewards, training, and career advancement opportunities contribute to attrition rates.

The employee survey conducted in September 2022 found that residential care staff attrition rates were moderate to high, primarily for mental health technicians and therapists. Attrition rates and inconsistent residential teams present significant challenges that impede resident and staff organizational goals, quality care, and safety. These conditions set back BHOA’s overall organizational performance (Participant 3). Figure 2 provides leaders' perceptions of the organization's retention problem.

**Figure 3***Behavioral Health Organization A Leaders' Perceptions of Retention Rates*

*"So, our retention rates in general, at this point, are not satisfactory. I would say that our retention rates across the division are below the threshold of what we would like to see."  
(Participant 1)*

*"We do not have great retention. The world has changed since COVID and getting back on track has been a struggle." (Participant 3)*

*"Retention rates are low here" (Participant 4)*

Retention rates have consistently decreased among programming staff. BHOA leaders described initiatives and barriers experienced in improving retention rates. For example, a new training program was developed so that new employees receive initial training from operations and HR. The employees have more one-on-one training for an added week onsite. Employee feedback from the most recent leadership meeting reports that the new training process was running smoothly. The employees received the information they needed to perform all job responsibilities effectively.

A common belief among the participants is that due to high turnover, low retention rates, and little to no succession planning, there is not enough staff to provide the services to the standard the organization wishes to achieve and remain competitive in the industry. The employee survey (September 2022) revealed that employees felt they were not rewarded or recognized for their demanding work. Participant 4 stated that factors that may contribute to high turnover rates are "overworked, unappreciated, and the difficulty and amount of work."

## **Workforce-Focused Results**

The interview transcripts with BHOA leaders are consistent with the literature about low wages for employees, complex client populations (exhibiting acute psychiatric symptoms), and enhanced training opportunities to decrease turnover rates (Schnabel, 2016). According to Boel-Studt and Tobia (2016), workforce development and training were identified as employee challenges. Offering competitive wages is a challenge. According to Boel et al. (2016), “fifty-six percent of respondents indicated that they felt their staff did not receive adequate training, which, along with low wages, contributes to retention issues”. Participant 3 described BHOA’s new training processes regarding staff competency: “This is a long process, starting with training webinars for the first 3 to 4 days and then on-the-job training and shadowing. There is also a training checklist, a 30-60-90 check-in for MHTs, and weekly check-ins with clinicians.”

Additional professional development programs for mental health technicians offer additional training in Cognitive Behavioral Therapy, Dialectical Behavioral Therapy, Acceptance and Commitment Therapy, and substance abuse. Once an MHT completes these courses, they are eligible for a \$1 raise. The MHT can take a new class every eight months, earning raises faster than their annual performance raise.

Addressing workforce development and retention issues is paramount to serving residential clients. To ensure quality and evidence-based care, focus on providing adequate training, supervision, and support for employees and supervisors (Boel-Studt & Tobia, 2016). Employee wages are consistently reported as a barrier among BHOA leaders to retaining quality residential staff. Entry-level mental health technicians at the

programs can earn approximately \$31,200 per year (\$15/hr.), with more experienced mental health technicians can earn up to \$41,600 per year (\$20/hr.). Table 4 represents BHOA's rate of pay, education, and experience requirements in the southeast region.

**Table 4**

*2022 Behavioral Health Organization A's Hourly Pay Rate for Mental Health*

*Technicians*

Region: Florida	Pay range	Minimum qualifications
Mental Health Technician I	\$15–16/hr.	High school diploma, some experience working with MH or with adolescents preferred. Must be 21
Mental Health Technician II	\$16–17/hr.	Bachelor's degree OR 1-year experience in mental health setting or working with adolescents
Mental Health Technician III	\$17–19/hr.	Bachelor's degree OR 2 years working in an MH setting or working with adolescents
Mental Health Technician IV	\$19–20/hr.	Master's degree or bachelor's degree with 1 year working in MH OR 2 years working within the organization specifically

*Note.* Information from BHOA pay rates, 2022.

## **Workforce Climate**

Semi-structured interviews with BHOA leaders show that the programs have a diverse workforce with varying ages, education, and experience levels. The organization's first employee satisfaction survey revealed that more attention was desired to celebrate and honor specific cultures and diversity. The age ranges of the employees are from eighteen to mid-fifties. The younger employees appear to relate to the clients well and, at times, develop a solid rapport and support system for the client. On the other hand, the younger employees have a tough time with the clients as they view them more as peers than authority figures. Older employees take the opportunity to help those less experienced by passing along their knowledge in helping to care for the clients by setting proper boundaries and expectations.

Based on this feedback, the organization hired a Diversity and Inclusion Director and created sub-groups for each ethnic or cultural group. Employees were chosen by these sub-groups to stand for and support that culture. Diversity scores from the survey have been higher than the goal. However, the employee survey in September 2022 revealed that employees' sense of belonging and inclusivity is lower than the average rate. These lower rates suggest that while the organization is diverse, the employees are not feeling valued or included individually and may appreciate individual attention from their leadership.

Data collection, such as job-specific manuals, HR manuals, and organizational policies, were reviewed to determine the organization's climate. Findings conclude that health and safety measures have been implemented to increase the residential staff's



mental and emotional well-being. According to Participant 4, weekly and monthly walkthroughs of the facility, daily shift reports, incident reporting, and emergency drills are conducted to ensure the safety of the clients and employees. As mentioned above, there are quarterly health and safety meetings where health and safety concerns are discussed, and a plan of action is created and implemented. Participant 4 provided insight into the emotional and physical safety of the staff from a facility perspective. They report the following (BHOA interview, Participant 4, September 11, 2022):

- 1 to 4 ratio that lends to physical support and maintains safety
- 16-hour nonviolent crisis intervention certification for each employee
- Teach verbal interventions as needed during a group supervision
- Discuss residents and brainstorm interventions during treatment team meetings.
- Encourage mental health days and support a work-life balance.

Other comments regarding the staff's physical and emotional safety relate to the relationship between leaders and employees. Based on the employee survey results, the employees do not feel appreciated or rewarded for their hard work. Knowing, observing, and interacting with staff can increase positive communication. "We used to have a staff appreciation budget for encouragement, training, and making time for the team, but that is currently paused." (Participant 4). This data suggests that increasing employee appreciation, retention programs, and succession plans could help improve the relationships between employees and managers.

BHOA offers a comprehensive healthcare benefits package, including medical, dental, and vision insurance and short- and long-term disability benefits (BHOA Benefits package, 2022). The employee assistance program is considered an underutilized service. Still, it is valuable and beneficial for employees to help them succeed despite the difficulties they may experience (Participant 3). The initial employee satisfaction survey results indicate that employees wanted more time off available. Since then, the paid time off policy has changed. The new policy states that employees get two weeks of vacation if they are with the company for one year. Then at the second-year mark, they get three weeks; at the five-year mark, it is increased to four weeks. Increasing the employees' available time off for vacation and personal days is an example of a positive outcome from the monthly employee surveys. The organization hopes that acting from these surveys demonstrates employee support.

### **Leadership Results**

BHOA's President, Vice President, CEO, and individual Program Directors constitute leadership for the organization. Leadership meetings are held regularly to communicate and discuss significant changes and common issues the organization is improving. The organization communicates information by holding quarterly town hall meetings, monthly regional leadership meetings, and weekly meetings with program leadership and the CEO. The agency leaders inspire and guide the BHOA's growth and change capabilities through a collaborative and expansive communication approach with employees (Participant 2). Participant 4 states, "To make a change to a working system requires a lot of planning and communication for change to be fully effective and

accepted by the people who work for the company.” The leaders agreed that effective communication regarding change starts with the organization's top leadership.

### **Financial Findings**

Complete financial records were not available for review. However, program budgets, turnover reports, and overtime reports were accessible. A recent overtime report stated that the program spent approximately \$1500 a week in overtime costs. Over the year, this could cost the program \$78,000 if the turnover and retention rates do not improve to decrease overtime costs. Each program has its budget to work from based on its census. However, Participant two reported that the organization measures its success in more than financial terms, such as length of stay, employee and client satisfaction reports, average daily census, discharge types, employee turnover, compliance with employee files and training, and completion of documentation and audits within policy time limits.”

### **Positive Social Change**

Implications for social change provide a cohesive work environment and a broader reach for delivering healthcare services to the community that is consistent in quality and held to the highest standards of care. Leadership development in behavioral healthcare contributes to positive social change (Booker et al., 2016). Exploring strategies for succession employed by behavioral health leaders of other organizations could assist BHOA in developing a plan to improve the visibility and growth of future leaders across this organization.

The organization could explore how similar organizations plan for change and improve their visibility and growth. Findings from this study of BHOA reveal that there were no written succession plans for employees. Results also support that the organization relies on internal mentorship between existing leaders and staff to transition employees and leaders into new positions. Quintana et al. (2014) state that organizations with an engrained philosophy built on employee engagement and leadership promote talent retention to sustain corporate productivity.

### **Strengths and Limitations of the Study**

Qualitative research is not linear and is informed by the epistemological and methodological stance of inquiry and beliefs (Ravitch & Carl, 2016). This method allows the researcher to understand the agency's perspectives, organizational mission, vision, strengths, and barriers preventing the agency from providing the needed services to the client population.

#### **Strengths**

This qualitative study adhered to research standards set forth by Walden University. These standards were used when obtaining participants' perceptions and experiences to improve agency outcomes. Relational ethics in qualitative research include discovery-oriented approaches and emphasis on how data emerges from represented encounters between researchers and participants (Ravitch & Carl, 2016). This study focused on maximizing credibility, validity, and dependability, which were accomplished using triangulation when analyzing interview transcriptions, BHOA website reviews, and literature reviews. Requesting the participant to review the transcribed interview provided

opportunities to confirm transcription accuracy. The Baldrige excellence framework was used to guide the analysis of the BHOA structure, processes, and performance. The Baldrige excellence framework is a systems perspective that manages all the elements of an organization as a unified whole to achieve ongoing success. It is a nationally recognized model for evaluating a healthcare organization's systems and identifies criteria in seven key areas: a) leadership; b) strategy; c) customers; d) measurement, analysis, and knowledge management; e) workforce; f) operations; g) results. Through analysis of the 7 key areas, the framework allows the BHOA to reach its goals, improve results, and become more competitive (NIST, 2020).

Reflexivity was used during the study to have awareness and monitor the researchers' role and ongoing influence on the study. Close attention was given to issues of power and equity during the research, so the research was centralized and accurately represented the participants' experiences; and rigor, which encompassed a variety of concepts including transparency, understanding of people, maintaining fidelity to participants, and development and engagement of research design. These considerations made rigor more challenging to maintain; however, allowing for the study's validity was critical. Finally, member checks were used to check in with the study participants. A person-centered approach enables the interviewer to signify the information as an adequate representation of the participant's reality (Ravitch & Carl, 2016).

### **Limitations**

This qualitative case study sought to identify growth and development factors essential to successful employee retention and succession planning. The findings were

limited to the participants' responses based on individual opinions and perceptions.

Although the study provided reliable qualitative data regarding the effects of turnover without a succession plan, there were limitations, such as the data is limited to one organization. Future research should expand beyond one organization, providing a larger sample size to improve the replicability and reliability of results and generalize the applicability of determining solutions. Second, the sample size consisted of four senior-level participants. A larger pool of respondents would broaden the variability of responses and identify a case for consistency and identifiable issues.

The study also considered other peer-reviewed work published during the past six years and found a limited number of points of merging relative to the lack of succession planning, high turnover, and low retention rates. Outcome data regarding the effects from a lack of succession planning across a few available studies were insufficient. There were minor implications for practice discussed, which solidifies this recommendation to conduct further research.

### **Summary**

This study explored how the organizational environment and lack of a succession plan affects the organization's growth and development. The study results were discussed, including identifying themes aligned with the existing literature, such as work environment, growth and development, retention, and succession planning. The organization's workforce-focused results demonstrated how the organization strives to provide a supportive work environment for employees. A supportive and stable work environment enhances the quality of services during organizational change. Finally, the

strengths and limitations of the study were emphasized and discussed. Section 5 provides recommendations for action.

## Section 5: Recommendations and Conclusions

This qualitative case study aimed to identify how the lack of succession planning affects a behavioral health organization during high turnover and low retention. Retention planning and succession plans should go hand in hand. The study's findings can provide the organization with recommendations to support successful transitions during turnover and change. The next session provides recommendations to assist BHOA in implementing a business succession plan in the event of an unexpected leadership loss.

### **Recommendations for Improvement**

Transitioning from one leader to another can affect the coherence of an entire organization, including stakeholders and other leaders. Organizations that lack structured succession plans often fail to identify and align qualified employees with business tactics to promote leadership continuity (Bowen et al., 2014). The results of this study indicate the impact of high turnover on a behavioral health organization without effective succession plans and the importance of succession planning within the organization. Based on the themes that emerged through a semi structured interview process and the presentation of data from participants' responses, the following recommendations may help in implementing a business succession plan.

The first recommendation is for BHOA to create succession plans that prepare the organization to strengthen its workforce. The value of succession planning is well-supported throughout academic and professional literature. There are several resources from which BHOA can choose to lead its efforts to improve its current succession-planning process. The succession plan needs to guide the seamless continuity of services



when employees change positions. However, it must also be flexible in constant change and shifting market demands.

To attract and develop talent in the modern workplace and implement innovative strategies to develop next-level leaders and prepare for succession at every level of the organization, there must be a plan in place (Powell, 2022). There are 7 steps that organizational leaders should consider when developing succession plans. Table 5 explains each step and strategies for implementation.

**Table 5**

*Succession Planning Strategies*

<i>Steps</i>	<i>Strategies</i>
<i>Prioritize</i>	Every organizational goal should have a focus on succession planning. If the BHOA wants succession planning to work, it must be prioritized.
<i>Define the ideal</i>	Define what makes a leader successful in the organization. This is key to ensuring that the company communicates the right message and selects future leaders.
<i>Communicate</i>	Define what makes a leader successful in the organization. This is important in ensuring that the company communicates the right message and selects the right future leaders.
<i>Engage the workforce</i>	Ensure that everyone understands the organization's focus on succession planning, what that means, how they can participate, and whom the company is looking for in terms of future talent. Every team member should have the company's criteria for advancement and feel empowered by the opportunity. One-on-one coaching sessions allow employees to ask how they could get in line for succession.
<i>Create opportunities</i>	Ensure that the succession planning process is not driven top-down. To create a successful succession plan, create projects and experiences, schedule opportunities for candidates to engage with other employees, and enable them to collaborate with other team members and learn from other leaders.
<i>Find talent</i>	Remind everyone of the criteria for advancement and ask staff to check for internal and external candidates and make referrals continuously.
<i>Review, adjust, and act</i>	The current marketplace is constantly changing, and a company's succession plan must shift with it.

*Note.* Based on the work of Powell (2022).

BHOA should align itself with the best practices for succession planning, including assessment of critical figures, identification and assessment of key talent, creation of development plans, monitoring, and review. When an organization creates a viable succession plan, employees focus on their long-term goals and become more aware of the turmoil an unplanned departure can create. A succession plan gives clients and customers confidence in the organization because they know it will continue to provide products and services without interruption (Coonan, 2015).

The second recommendation is to create a retention planning program. Based on the results, the organization does not have a clear and utilized retention plan for entry-level positions. Employee retention is critical to an organization's long-term stability, development, and profitability. The implementation of four tactics may achieve employee retention. Primarily, effective communication should be emphasized. Second, it is important to employ a diverse team and provide personnel with the necessary skills. Finally, it is necessary to provide staff with development and training opportunities. Sirili and Simba (2021) mentioned several retention strategies that the BHOA could use to increase growth and development for employees and the organization. Below is a list of retention strategy suggestions for entry-, mid-, and senior-level employees.

*Health-facility entry-level employee retention strategies:*

- Promote good community reception.
- Enhance a good working relationship with local government leaders.
- Foster cooperation and trust among health workers.
- Reward the best performer of the year.

*Mid- to senior-level retention strategies:*

- Provide career opportunities and support.
- Establish financial incentives.
- Receive support from nongovernmental organizations.
- Engage in active recruiting in training or educational institutions.

(Sirili & Simba, 2021)

As devised by some of the facilities, providing prizes to the best employees of the quarter is a less costly strategy. Retention can be improved by implementing it such that the incentives come from the facility's resources rather than individual contributions.

The third recommendation is for the organization to focus on and support leadership development for potential organizational leaders. BHOA should pair incoming employees with existing seasoned employees to provide mentorship within the 1st year of employment. A mentor can provide additional opportunities for learning with the employee and allow those experiences to be individualized to the new employee's abilities and developmental needs. This suggestion aligns with the overall recommendation for succession planning, which will extend into the organization and provide new leaders with a better view of the organization.

The fourth recommendation is for the organization to associate itself with best practices in professional development. The benefit is that the organization may retain employees, positively impacting the overall quality of its services. The organization should regularly audit employees' professional goals, training, licensing, and educational achievements. It would also benefit the organization to utilize technology to follow

employee performance and accomplishments and provide simple spreadsheets to track, download, and share with management.

Tracking employees' performance could be done through the organization's current online HR programs. The current HR and training platform has this feature. The BHOA would benefit from teaching facility leadership to incorporate this into performance evaluations. As mentioned, entry-level employees have 30-60-90-day reviews. Evaluations at these increments were implemented to track and engage employees from the beginning. However, based on the survey results, the employees do not feel engaged or supported and desire more training opportunities. All employees receive annual performance evaluations. There is an opportunity for the employees to create goals for themselves and for management to create goals for the employees to achieve their next level of career advancement. Individual supervision and coaching sessions can increase employee engagement and support.

### **Summary**

The business concept of succession planning is a vital process in behavioral healthcare institutions (Rosenthal et al., 2018). Healthcare organizations need succession planning for leadership and entry-level employees (Smith, 2019). The findings of this study indicate that retention of health workers at the primary healthcare level requires not only mid-level strategies, but rather a combination of strategies from the national to the facility level, financial and nonfinancial, and strategies that target the individual health worker as well as the general community where they work (Sirili & Simba, 2021).

Bottom-up retention strategies involve the community, health workers, and community participation in governing health facilities. Therefore, they are easily understood by stakeholders at the primary healthcare level. The latter is crucial for ownership, making the strategies more likely to be sustainable. Finally, the retention of healthcare workers in rural areas calls for multiple strategies beyond financial incentives. Examples include working from home 1 day a week or receiving additional paid time off.

Further studies are needed on a larger scale to discover more bottom-up retention strategies and assess the few identified by the study. According to Smith (2019), despite the noted trends, two thirds of healthcare organizations lack an existing program or have one that is less than comprehensive. This study was intended to provide an assessment and analysis highlighting the current gaps in succession and retention planning that inhibit organizational change.

The use of methodological triangulation presented an opportunity to collect data through multiple sources. Semi structured interviews were used to gather data through open-ended questioning of four senior-level leaders. Next, HR policies, digital data, and other corporate and historical documents were examined. Data validity was ensured through member checking. The emerging themes aligned with the existing literature and highlighted staff development, employee engagement, leadership support, and work environment.

This study's findings are important to senior leaders, corporate board members, and CEOs as they seek to identify the need for succession planning and the gaps created due to low retention rates. Overall, this study's findings align with the study's purpose

and the analytical framework. The information presented in this study can have a positive social impact on the behavioral health community and can be used to improve leadership development, support succession-planning implementation, and encourage organizational change.

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## Appendix: Interview Protocol and Questions

### **Interview Protocol:**

- Review and complete Informed Consent if not already completed.
- Confirm with the interviewee that they consent to the interview and the recording.
- Begin recording.
- Thank participants for agreeing to participate in this research project.

### **Interview Questions:**

1. How do you think management can best manage organizational change and why?
2. What, if any, strategies do your organization currently have in place for leadership change? Please elaborate.
3. How is the success of your program measured? Please elaborate.
4. How do senior leaders deploy organizational vision and values through the leadership system to employees? Please elaborate.
5. What is your current perspective on retention rates among your employees? Please elaborate.
6. What factors do you attribute to high turnover among the employees? Please elaborate.
7. What are your current leadership strategies for retention? Please elaborate.
8. What are your strategies for engaging and supporting employees? Please elaborate.

9. What is your perspective on the importance of succession plans? Please elaborate.
10. What strategies are there for implementing successful succession plans? Please elaborate.
11. How do leaders create an organizational culture that benefits from the diverse ideas, cultures, and thinking of the various employees? Please elaborate.
12. What platforms are available for employees to share ideas and concerns? Please elaborate.
13. What measures are in place to ensure employees' physical and emotional safety? Please elaborate.
14. How are employees trained? Please elaborate.
15. What programs are in place for employee Professional Development? Please elaborate.
16. What is the process for career advancement for employees within the organization? Please elaborate.
17. How many employees are needed to maintain operations at the program level without impacting services? Please elaborate.
18. What are the current barriers to maintaining a sufficient and stable pool of employees to meet service demand? Please elaborate.
19. How would you describe the organization's competitiveness in attracting and retaining employees? Please elaborate.
20. Any aspects of the organization that might limit its appeal to employees?