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Solutions to Retaining Leaders in Behavioral Health Organizations

Kelly Murphy
Walden University

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Walden University

College of Management & Human Potential

This is to certify that the doctoral study by

Kelly C. Murphy

has been found to be complete and satisfactory in all respects,
and that any and all revisions required by
the review committee have been made.

Review Committee

Dr. Miguel Messina, Committee Chairperson, Psychology Faculty

Dr. Michele Fry, Committee Member, Psychology Faculty

Chief Academic Officer and Provost

Sue Subocz, Ph.D.

Walden University

2025

Abstract

Solutions to Retaining Leaders in Behavioral Health Organizations

by

Kelly C. Murphy

MS, Walden University, 2016

BA, Northcentral University, 2013

Doctoral Study Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Psychology in Behavioral Health Leadership

Walden University

February 2025

Abstract

Retaining qualified behavioral health leaders is critical to the success of the behavioral health organization. Continually exploring solutions and strategies helps the organization to assess and improve its effectiveness in meeting its mission, vision, and values. This study focused on the development and execution of the strategic plan as a tool for the organization to successfully meet its goals. The problem addressed in this study is the leadership turnover rate and how this change impacts progress toward achieving the mission, vision, and values of the organization. The Baldrige Excellence Framework was used in this study to evaluate processes of hiring, training, and development of leaders within a behavioral health organization located in the western region of the United States. Data sources collected for this study included semi-structured interviews with leaders of the organization, a review of current literature, leadership meeting minutes, leadership training plans, and retention and turnover rates. Themes that emerged from the data analysis revealed three significant areas: lack of performance measures, underutilization of the organization's strategic plan, and lack of necessary data to identify areas for improvement. Recommendations have included utilizing the strategic plan as a roadmap and review for progress regularly, and developing individualized performance measures based on leadership job descriptions. This study will contribute to positive social change by providing solutions to retaining qualified leaders and reducing turnover, as turnover impacts more than the organization; it impacts family income, career adjustments, and possible loss of salary, as well as the possible increased stress of moving jobs.

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Section 1a: The Behavioral Health Organization

The behavioral health organization (BHO) in this study started in 1965 as a small donation-funded, non-profit healthcare clinic offering adult therapy and psychiatry to community members who could otherwise not receive behavioral health services. The leaders and community members were committed to developing a better way of providing behavioral health services, as many individuals could not access healthcare due to the rural environment and financial barriers that made it difficult to travel for services. According to the behavioral health leader, this commitment to meeting the behavioral health needs of the community resulted in the BHO becoming the region's first structurally integrated healthcare organization.

Practice Problem

The situation or issue that prompted the study is the turnover rate for leaders within the behavioral health organization. Organizational success is affected by the inability to retain qualified leaders (Brabson et al., 2020). Additionally, leadership directly impacts workplace performance, which connects to organizational revenue and sustainability (Cho et al., 2021). This study aimed to provide solutions for retaining qualified leaders to align leadership with organizational goals. Leaders within the organization would benefit from a structured training plan supporting continued growth, personal reflection, and the BHO's strategic plan by adhering to the mission, vision, and values (Branson et al., 2020).

Purpose

The purpose of this qualitative case study was to explore solutions to retaining

positive and effective leaders. This study focused on a small community-based integrated healthcare organization that has grown significantly in the past several years to provide services statewide and lead the market for innovative behavioral health and primary care crisis response services. The BHO is ideal for this study because of the rapid growth, ambitious strategic planning, and the frequency with which leaders leave their positions or the organization itself. The study may provide solutions for retaining qualified leaders to reduce turnover by aligning leadership with organizational goals.

To address the research questions in this qualitative study, the approach included interviews with the organization's CEO, leadership training plans, internet searches, the organization's website and news articles, and internal documents made available to employees and board members. This qualitative study can contribute to positive social change by serving as a benchmark for incorporating specific measures and training programs for leadership among other behavioral health organizations who are looking to reduce leadership turnover, as well as consider leadership development as a way to improve morale, increase productivity, and overall working to become an employer of choice.

The Baldrige Framework of Excellence framed this study to explore and expand on the leadership focus and identifying what is important to the organization. This BHO harbors a vision of flexibility and innovation, which aligns with the Baldrige Framework by encouraging the use of creative, innovative, and flexible tools, such as the Six Sigma and Plan-Do-Check-Act. Additionally, the Baldrige includes analysis and knowledge management, strategic planning, and customer focus (Baldrige, 2021). The logical

connections between the framework presented and the nature of the study include Baldrige's theoretical approach as a framework for leadership performance assessment, development, and improvement (Baldrige, 2021). The Baldrige Framework guidance on identifying leadership measures and improving organizational success in reaching strategic goals that align with the mission, vision, and values.

Significance

Leadership behaviors impact workplace culture, productivity, and employee turnover (Cialdini et al., 2019). The study is significant in addressing the importance of leadership selection and continued development by focusing on retaining qualified leaders in the behavioral health organization. The results of this study can assist organizations in providing solutions to retain qualified leaders and reduce turnover. While this is essential to the organization's success, it will also promote the importance of positive social change through improving workplace engagement and morale.

Summary

The BHO relies on its quality of care when marketing its services; however, it has experienced problems retaining qualified leaders, especially mid-level leaders, which challenges the ability to provide quality care as the workforce needs stability in order to function at its optimal level (Proctor et al., 2019). The CEO has stated that leadership turnover is, in large part, due to the organization's focus on rapid movement and the workload, which includes doing more for less to achieve efficiency.

Section 1b: Organizational Profile

The BHO started serving a small community in 1965 and has been making headlines in local and state news over the past 7 years as new leadership identified innovative ways to deliver services, according to the BHL. The CEO was named in 2017 as an internal candidate who started as a child and family therapist, working her way to becoming deputy CEO for a brief time before assuming her role as the organization's leader. The CEO prioritizes growth and innovation in healthcare and initiated a complete rebrand shortly after she started in this role, including the name of the organization, to focus on whole-body healthcare that meets individual healthcare needs in the home, office, and community. The mission, vision, and values of the organization are:

- Mission: committed to providing clinically excellent prevention, education, treatment, and advocacy to improve our members' and their families' health and mental well-being.
- Vision: to be the gold standard for youth and family service delivery in the counties for which we serve, by providing culturally competent, holistic, and evidenced-based integrated services.
- Values: professionalism, integrity, honesty, sensitivity, caring.

According to the BHL, service excellence is part of the BHO's delivery of care modality, as it promotes the importance of whole-body treatment with compassion, innovation, and expertise.

Organizational Profile and Key Factors

The BHO is a nonprofit, fully integrated behavioral health organization led by the

CEO, who reports to the board of directors. The board comprises community leaders, people with lived experiences in behavioral health, and people with particular knowledge and skills needed to guide the organization. According to the organizational flow chart, confirmed during the initial BHL interview, the leadership structure has changed twice this year. The current leadership structure reporting to the CEO includes deputy CEO (a new role), chief technology officer, chief business development officer, chief financial officer, chief human resources officer, and several vice presidents (VPs) with specific departmental oversight throughout the state.

Organizational Background and Context

According to the BHL, the organization is funded by Medicaid, private insurance, and state and federal grants. The BHO has grown throughout the state over the past several years, providing services via telehealth, mobile, community, and in person. One of the first of its kind, the BHO has also developed mobile teams offering medical, psychiatry, therapy, primary care, pain management, crisis, and medicate-assisted treatments, bringing the services directly to the customer. Currently, offices are in eight different cities throughout the state, with mobile and telehealth services that cover the entire state, including tribal reservations.

The BHL reported this organization as one of the only statewide fully integrated health homes, offering primary care, psychiatry, behavioral health, and pediatric services. Additionally, services include mobile primary care, crisis services, and residential and substance use programs. The BHO has many diverse partners and stakeholders, including law enforcement, hospitals, health plans, managed care organizations, courts and

probation, and other community-based organizations that offer specific services.

Additional stakeholders include municipality and county-elected officials who represent the community members. The Behavioral health leader (BHL) emphasized that partners, suppliers, and collaborators are essential to the BHO's ability to provide services to its many communities. The BHL shared that the organization uses suppliers for tangible items, such as office equipment that supports staff in providing their services. Within the last several months, the organization has partnered with a national provider of cloud-based technology solutions as a strategic plan toward improving access to integrated care throughout the state.

While the BHO partners with several community-based organizations throughout the state to offer services under its umbrella, it continues to face competitive environments as customers can choose their behavioral health home, versus 5 years ago when people on Medicaid were auto-enrolled in a behavioral health home, according to the BHL. Other behavioral health and integrated health organizations are in direct competition with this BHO, whose focus is rapid growth throughout the state, which in some cases has forced other agencies to reduce the services offered to be more specific. An example provided by the BHL during an interview is that one organization in the county is contracted with the adult court and probation offices to provide intensive outpatient programs, as this BHO does not offer this particular service due to the demands of the program and the strain on personnel who would facilitate this program.

The BHO's key strategic challenges and advantages are associated with the organization's overall success, which can be broadly measured by the strategic plan

(Bryson, 2018). According to the BHL, in 2023, the BHO updated its strategic plan to include four main areas of focus: access to care, whole-person care, impactful innovation, and excellence. While the strategic plan does not provide a roadmap for how the organization will achieve these goals, it is used as an infographic for employees, stakeholders, and community partners to identify the BHO's values that drive their actions. This is a possible missed opportunity for this BHO, as a strategic plan is more than a road map for the organization's success—it is a guide for promoting and measuring workplace culture, overall goals for revenue, and ensuring alignment of operations to ensure optimal outcomes and promote a competitive advantage (Bryson, 2018).

Summary

Over the past 2 years, the average mid-level leader at the BHO has been in their position for less than 1 year. Further review of leadership training plans, outcomes of exit interviews, and how leaders are identified and trained will be in the following sections. When leadership skills and development are optimal, so is overall job performance; employees who have low job performance also have lower commitment to their work and organization (Sungu et al., 2019).

Section 2: Background and Approach—Leadership Strategy and Assessment

This qualitative study can assist this organization and serve as a benchmark for incorporating specific measures and training programs for leadership among other BHOs that are looking to reduce turnover. This approach is based on the work of qualitative interviewing for a better understanding of what organizations can do to hire, promote, and retain effective leaders (Akin & Eaton, 2020). BHOs are challenged with retaining qualified staff and leaders, which significantly affects these organizations (Brabson et al., 2020). Best practices for retaining qualified employees include understanding the organization's recruiting, hiring, and training processes (Williams & Beidas, 2019). It is also important to understand the costs of hiring and retraining staff and the impact on strategic planning. The purpose of this qualitative study was to explore solutions to retaining qualified leaders, which starts with the hiring process and includes leadership development through assessment and strength-based processes that target leadership.

Governance System with the Behavioral Health Organization

An organization's governance system promotes accountability and transparency amongst leadership, which affects the entire workforce. The governance board in healthcare organizations naturally builds on collective yet different interests for the purpose of implementing policies and practices (Diaz et al., 2017). While the role of governance in behavioral health is a relatively under-researched field, there is a general understanding of its purpose to have a system in which checks and balances are created to ensure ethical and effective delivery of services while meeting the organizational mission, vision, and values.

Leadership Strategy and Assessment

Leadership behaviors directly impact employee performance, indirectly affecting client outcomes and experiences with the organization (Cialdini et al., 2019). The BHO in this study has developed a governance board comprised of community leaders, people with lived experiences in behavioral health, and people with particular knowledge and skills needed to guide the organization. The organization ensures responsible governance through a robust structure and comprehensive orientation for board members. Each new board member receives an information manual, which includes critical, crucial, or vital but not “key” documents such as the mission and vision statements, strategic plan, board bylaws, policies, and clinical services plan. The CEO or designee reviews this manual with the new board member within 30 days of their appointment to emphasize its relevance to their duties.

Annually, at the board retreat, the CEO and deputy CEO conduct an educational presentation for the next fiscal year, addressing healthcare trends, organizational needs, and community impacts. This ensures continuous development and informed decision-making. Additionally, the compliance officer provides annual updates to the board on compliance matters, ensuring adherence to legal and ethical standards. The executive leadership team, led by the CEO and comprises various key executives, supports the CEO in managing operations and maintaining governance standards, ensuring the board is well-equipped to govern responsibly and effectively. Governance board members are required to sign a code of conduct policy, which includes the following requirements, as provided by the BHL:

- Represent the interests of all people services by the company and not favor special interests inside or outside of this non-profit company,
- Not use my service on this board for my advantage or the advantage of my friends or associates,
- Keep confidential information confidential,
- Respect and support the majority decisions of the board of directors
- Approach all board issues with an open mind, prepared to make the best decisions for everyone involved,
- Do nothing to violate the trust of those who elevated or appointed me and for those whom we serve,
- Focus on my efforts on the mission of the company and not my personal goals,
- Never exercise authority as a board member except when acting in a meeting with the full board or as the board delegates me,
- Only support a decision and act in a manner that is consistent with the interests and needs of those we serve, and
- Promptly reveal any conflict of interest that might apply as a board member.

This robust governance framework ensures that the organization operates with integrity, transparency, and accountability at all levels of governance.

Performance Evaluation

The Board evaluates the CEO during their annual board retreat. The CEO shall include a written self-appraisal and overview of the year's organizational achievements.

Each board member completes a CEO evaluation of performance form which is then provided to the president of the governing board. The president of the board then works with the VP of human resources to review, compile, and prepare a written summary of the results of the evaluation of performance forms. During the annual board retreat, the president will present the written summary of results and allow the opportunity for a response from the CEO in an executive session. At that point, considering the evaluation summary and the CEO's response, the board collaborates with the CEO to establish new and measurable administrative goals and objectives.

Performance Evaluation Process for CEO

The CEO's performance evaluation is a comprehensive process involving feedback from multiple sources: the Board, the executive leadership team (ELT), and the CEO. This feedback is collected, and the Board conducts a performance evaluation during an executive session. The BHL provided the following information about categories rated for CEO evaluation:

- Leadership
- Strategy
- Mission
- Service Provision
- Financial
- Compliance and Ethics
- Organizational Culture
- Board Relationship

- Branding and Organization
- Community Profile

Performance Evaluation Process and Questions for Executive Leaders

The performance evaluation for executive leaders involves an annual assessment of their leadership in various domains critical to the organization's mission and operational efficiency by the CEO or Deputy CEO. The categories rated for executive leaders include

- Leadership and Vision
- Implementation of High-Quality, Cost-Effective Programs and Services
- Support of Organizational Mission and Goals
- Team Development and Supervision
- Job Knowledge/Technical Skills
- Quality of Work
- Judgment
- Communication
- Independent Work and Productivity
- Initiative
- Creativity and Innovation
- Teamwork and Coworker Relations
- Client/Patient Relations
- Dependability/Reliability
- Attendance/Punctuality

- Coaching and Developing Staff
- Demonstrated Management Skills

Performance Evaluation Process for General Leaders

It was reported by the behavioral health leader that general leaders, which include supervisors, managers, and directors, are evaluated based on defined behaviors and competencies. The performance review includes ratings across several key areas and the setting of SMART goals for the next review period. Categories rates for general leaders are

- Job Knowledge/Technical Skills
- Quality of Work
- Judgment
- Communication
- Independent Work and Productivity
- Initiative
- Group Work
- Creativity and Innovation
- Teamwork and Coworker Relations
- Client/Patient Relations
- Dependability/Reliability
- Attendance/Punctuality
- Coaching and Developing Staff
- Demonstrated Management Skills

Legal and Ethical Behavior

The organization proactively prepares for legal, regulatory, and community concerns with its integrated healthcare services as required by state and federal payors and regulations. The quality department is responsible for internal audits of charts to ensure compliance of healthcare standards and conduct patient surveys to measure against strategic goals for patient experiences and outcomes. Additionally, in collaboration with the human resource department, the quality department has measured employee performance, such as the 60% productivity standards identified by leaders. While these areas focus on workplace performance and compliance, there are few processes in place that measure leadership roles and their impact on employee performance, which aligns with the practice problem of possible reasons why behavioral health organizations see a turnover at the leadership level. While minimum standards are being met, there are little to no processes in place that identify standards in which leaders are being hired and trained, and their performance is measured outside of yearly performance appraisals.

The organization ensures ethical behavior through several key processes, including regular inclusivity committee meetings to address societal impacts and promote inclusivity, mandatory ethics training for all staff, and a signed Ethics Statement. The code of conduct guides all business and treatment processes to be conducted legally, morally, and ethically. The executive leadership team (ELT) acts as an ethics committee to address ethical dilemmas, with decisions aligning with the mission and protecting the rights for clients and staff.

Breaches of ethical behavior are monitored and addressed through corrective or disciplinary actions, up to and including termination. The ELT convenes to handle ethical issues, and legal counsel is sought when necessary. Continuous training in ethical decision-making is provided to all staff through in-service education and external opportunities, ensuring ongoing adherence to our high ethical standards.

Accountability for Senior leaders' actions: The Board maintains accountability for senior leaders' actions through regular performance evaluations, including an annual review of the CEO by the Board. Additionally, the CEO or deputy CEO completes an annual review for each senior-level leader to ensure ongoing accountability and performance alignment.

Fiscal accountability: Fiscal responsibility is maintained through monthly Finance Committee Meetings chaired by the Board Treasurer, where the CEO and CFO report on the organization's financial health. The Treasurer presents a monthly report to the Board, and key staff provides an updated Financial Packet.

Accountability for patient safety and healthcare quality: The Board reviews annual quality management updates and mandates adherence to high standards of care, ensuring accountability for patient safety and healthcare quality. Sensitivity and responsiveness to consumers and their families are demonstrated by listening attentively and understanding their needs, including recognizing and accepting diverse backgrounds. Consumers and their families are well-informed about treatment alternatives and active participants in their care. Care decisions are based solely on clinical needs and medical necessity. The organization provides equal access to high-quality care without

discrimination and ensures that all medical record documentation is accurate, complete, and timely. Ethical issues in consumer care are addressed by the ethics committee, serving as an educational forum and consulting body. Annual ethics/compliance training is conducted for all staff, emphasizing consumers' well-being, trust, safety, confidentiality, appropriate interactions, and adherence to professional standards.

Transparency in operations: Transparency is promoted through monthly Board meetings where updates on various organizational aspects are provided, and these reports are made publicly available to staff. The organization also practices transparency by maintaining an open line of communication through monthly management team meetings and weekly ELT meetings.

Selection of governance board members and disclosure policies for them, as appropriate: The selection of Board members follows a structured process to ensure demographic representation, compliance with regulatory requirements, and the inclusion of diverse competencies. When a Board vacancy arises, nominations with current biographies are solicited from existing directors. These nominations are reviewed and voted on during regular meetings. New directors undergo an orientation process led by the CEO or designee. The Committee maintains records of directors' terms and presents a slate of renewing directors at the annual meeting.

Independence and effectiveness of internal and external audits: The organization obtains an annual independent audit that complies with the requirements of federal and state governments, and other contracting agencies. The CFO coordinates all audit activities, utilizing independent auditors contracted by state Medicaid contractors or

selecting an auditor in coordination with the CEO if necessary. These audits comply with Federal Audit Circular A-133, ADHS, and AHCCCS requirements, and are performed by an independent Certified Public Accountant licensed in the state. The annual audit report is distributed to the organization's Board members, state Medicaid, and other contracting agencies.

Protection of stakeholder and stockholder interests, as appropriate: The Board ensures that all plans, policies, and procedures are regularly reviewed and updated to protect stakeholder interests.

Succession planning for senior leaders: Succession planning for senior leaders, specifically the CEO, includes a detailed Business Continuity Plan (BCP). If the CEO cannot perform their duties, the next person in the chain of command assumes these responsibilities - currently, the next in command is the deputy CEO. Specific activities include activating the BCP, establishing a control center, notifying management staff of emergencies, initiating a callback system, coordinating customer care, and managing communication with the media to ensure timely and accurate information dissemination.

The organization currently uses an annual compliance risk assessment tool - a security assessment tool, created by OIG, and other processes to identify and determine levels of risks across the agency. The results are presented to Leadership/the Board of Directors for review and action. The tool assists the organization in determining which regulations are relevant, identifying the specific requirements that are needed for compliance, conducting internal audits, establishing policies and procedures, and assisting in identifying the regulatory compliance and other training required for

employees. Annual goals are developed from review of the Compliance Program and the risk assessment tool.

Societal Contributions

Societal well-being and community support are key components of the BHO's strategic goals. With a mission of commitment to providing clinically excellent prevention, education, treatment, and advocacy to improve the health and mental well-being of the members and their families, the organization is driven by its passion and expertise in improving access to quality care for all community members.

Strategy Development

Strategy for general operations is decided by the executive leadership team, led by the CEO, and ultimately approved by the governance board. The ELT meets regularly to review strategic initiatives, projects related to their respective departments, and provide status updates, ensuring that strategic goals are consistently pursued and achieved. The organizational leadership structure has changed several times in the past three years, due to the growth of the organization throughout the state and widening the geographic service area. For many years, the organization was led by the CEO, who then directly supervises the CFO, VP of human resources, regional VP, chief administrative officer, and chief technology officer. Each of these executive leaders then has directors reporting to them, and supervisors and team leads report to the directors. However, given the speed at which the organization grew, the structure changed, as well as leadership titles. Currently, there are no longer regional VPs; instead, there is a deputy CEO and several department directors who report to that individual. The deputy CEO, CFO, and VP of

human resources continue to report to the CEO. The changes in leadership roles have created confusion amongst the staff, according to the BHL, and the executive leadership team expected this before making these organizational changes.

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

At the time of this study, the organization employs more than 300 individuals, with 40 of those employees in a leadership position. According to a 2023 report from the Hospital and Healthcare Compensation Services, the turnover rate for behavioral health employees is 33%, which is a slight increase from past years (Beckers, 2024). But while this data helps identify trends in turnover within the industry, there are very few studies that differentiate leadership turnover from general employee turnover with these national statistics.

During interviews with the BHL, it was reported that the organization has seen 0% turnover in the last 2 years within the executive leadership team, which consists of the CEO, deputy CEO, chief technology officer, chief business development officer, chief financial officer, chief human resources officer, and three regional VPs; however, the turnover rate has been above 36% each year for general leaders and staff. After requesting a review and breakdown of the turnover rate in detail with the BHL, it was discovered that general leadership turnover for the past 2 years was 41%, which includes team leads, supervisors, managers, and directors. This study aims to provide solutions for retaining qualified leaders and reduce leadership turnover.

The mission of the organization is innovation and growth through clinically excellent programs that prioritize prevention, education, treatment, and advocacy in healthcare. Using Baldrige's theoretical approach as a framework, this section focuses on leadership performance assessment, development, and processes for improvement

(Baldrige, 2021). The Baldrige Framework provides guidance on identifying leadership measures, improving organizational success in reaching strategic goals that align with the mission, vision, and values. Additionally, this organization's vision includes flexibility and innovation, which aligns with the Baldrige Framework by encouraging the use of creative, innovative, and flexible tools, such as the Six Sigma, Plan-Do-Check-Act (Baldrige, 2021). The problem addressed in this study is the turnover rate for leaders, and due to the direct impact, leaders have on the workforce, training, development, key performance indicators, and performance assessments will be reviewed for the purpose of identifying gaps between leadership vision and performance.

Analysis of the Organization

Workforce Environment, Engagement, and Operations

The human resources department recruits, hires, and retains employees. The organization recruits new employees through job websites, such as Indeed.com and the company's website. Additionally, employees are encouraged to recruit new employees through referrals. Employees who refer recruits who maintain employment for at least 6 months receive a \$100 referral bonus on their paycheck. The new employee is then eligible for a retention bonus of \$300 if they remain employed for a minimum of one year. According to the BHL, the human resource department learns what is needed to retain employees through annual evaluations.

The organization prepares its staff for any upcoming changes by holding quarterly "shop talk" meetings, in which the executive leadership team presents to all staff any updates to the strategic plan, discusses any operational changes, and addresses the general

state of the organization. During these meetings, staff are encouraged to ask questions and share their experiences to create and maintain a foundation of bidirectional communication between senior leaders and the employees. During a recent interview with the BHL, it was shared that not all shop talks have been successful, as staff sometimes leave the meetings more confused or anxious about the state of the organization as well as their job security.

As part of this qualitative study, the interview with the BHL also included leadership's responsibility to minimize confusion through regular communication and transparency rather than waiting for quarterly meetings from the executive leadership team. The BHL shared concerns about the apparent gap between executive leadership and the general workforce and suggested that this gap is due to a lack of mid-level leadership development and training. The organization has experienced problems retaining qualified mid-level leaders, which challenges the morale and stability of the workforce, often making it difficult to provide quality care and maintain key performance goals (Proctor et al., 2019).

Another way the executive leadership team encourages a supportive workplace is through regional events, agency participation in community events, and a shared internal webpage where employees can view updates, events, and pictures of their colleagues during office parties. Additionally, the organization has created a platform in which employees can share their ideas for improvement and become eligible to win a gift certificate in the monthly drawing of participants. Quarterly, the executive leadership team will select a winning idea, and with a larger monetary gift card, will announce this

winner to the organization.

The human resource department is dedicated to recruiting, hiring, and training employees that best meet the needs of the organization. But the organization is currently facing challenges of high turnover in mid-level leaders, therapists, and care managers, and from the interview with the BHL, in large part due to the straining workload that employees are expected to maintain. According to the organization's policies, all employees are to participate in an annual evaluation process, in which they are also expected to assess their performance. However, there have been issues in the past several years with ensuring these evaluations are being done by the leaders. The VP of human resources is in her first year with the organization, and this is an issue she has committed to changing by the end of this calendar year, according to the BHL, as it will assist executive leaders in making decisions for improving workplace performance, morale, longevity, and outcomes.

The process for hiring qualified leaders is another priority for human resources, as the organization has historically promoted from within the organization. However, there are risks with creating this precedence, as the process for identifying qualified leaders and employees should be based on their qualifications and skill level, not solely on their commitment to the organization and their willingness to learn a new position (Sung et al., 2019). Within the past year, the human resource department has hired two new staff members to create training plans for the workforce, including leadership development training. The BHL identified this issue after several staff left the organization due to their workload and fears of job security, and through the interview for this qualitative study, it

also acknowledged the need for a preventative process in which leaders are being measured, supported, and trained appropriately for their position. This study will address the practice problem, which is that the BHL reported that the number of turnovers for mid-level leaders has drastically increased in the past several years. Therefore, it is recommended the organization recruit, onboard, and develop protocols for high-level leadership development training that supports ongoing growth and success for each leader and their respective job responsibilities.

Knowledge Management

According to the BHL, the quality management department collects operational data to improve the overall client outcomes and experiences, while the human resource department is tasked with collecting organizational data to improve overall performance and employee satisfaction. All organization costs are controlled by the chief financial officer and discussed with the executive leadership team and governance board. Monthly board reports are shared with the entire organization, through the SharePoint platform, to promote transparency within the organization. The BHL also indicated that department leaders contribute to this board report each month but reported no template or guideline for what information is shared by the departments and acknowledged this process needs to be reevaluated and updated to better reflect strategic and intentional measures.

Summary

The study is significant in that it addresses the importance of leadership selection and continued development by focusing on retaining qualified leaders in behavioral health organizations. The results of this study can assist this organization, and others, in

providing solutions to retaining qualified leaders and reduce turnover. This is essential to the organization's success and also promotes the importance of positive social change through improving workplace engagement and morale. Additionally, the study aims to solidify the importance of measuring leadership development and outcomes that are not just specific to their departments but targets that align with strategic initiatives and the organization's mission, vision, and values.

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

The purpose of this qualitative case study was to explore solutions for retaining qualified leaders and reduce leadership turnover. The study site is a BHO in the southwest United States. This organization was ideal for this study, due to its ambitious strategic plan for growth while struggling with employee turnover, including significant leadership turnover. The study aimed to provide solutions for retaining qualified leaders and to reduce turnover by aligning leadership with organizational goals. To address the research questions in this qualitative study, the approach included interviews with the organization’s CEO, VP of human resources, and a review of current literature related to the retention of behavioral health leaders. Additionally, data were collected for this study through semi-structured interviews, which included leadership meeting minutes, leadership training plans, retention and turnover rates, and other internal documents.

Analysis, Results, and Implications

The BHO is a nonprofit, integrated behavioral health organization, treating the whole person with primary care and behavioral health services. The organization has grown throughout the state over the past several years, providing services via telehealth, community based, and in person. One of the first of its kind, the BHO has also developed mobile teams offering medical, psychiatry, therapy, primary care, pain management, crisis, and medicate-assisted treatments, bringing the services directly to the customer. The BHL reported this organization as one of the only statewide fully integrated health homes, offering primary care, psychiatry, behavioral health, and pediatric services. The organization is led by the CEO, who reports to the board of directors. The board

comprises community leaders, people with lived experiences in behavioral health, and people with particular knowledge and skills needed to guide the organization. The leadership organizational chart has changed several times in the past three years, according to the BHL, with three changes alone during this study in 2024. The organization continues to grow throughout the state, adding services and programs to different regions. The current leadership structure reporting to the CEO includes deputy CEO (a new role), chief technology officer, chief business development officer, chief financial officer, chief human resources officer, and several vice presidents and directors with specific departmental oversight throughout the state.

The BHL recognizes and understands that retaining qualified leaders is important, and while both the CEO and the VP of human resources discussed the high rates of employee turnover at the organization, there were very few ideas to address this problem during the interviews. When asked about some of the strategies used to identify problems and solutions, the BHL reported that they put forth a constant effort to generate new ideas from the ground up, rather than top down. The BHL provided examples in which employee ideas are collected, such as the “Think Tank,” where anyone can submit operational ideas to be considered for implementation, with the quarterly “winner” being selected and given a gift certificate. While offering avenues for employees to share ideas can improve investment and accountability, this system has been successful in changing smaller operational processes, according to the BHL.

Issues of leadership turnover continue to be a challenge for the organization, however, as agreed upon by the executive leadership team and reported during interviews

with both the CEO and the VP of human resources. One of the challenges is lack of data, such as exit interviews, standardized interview questions and processes, and ways to calculate the costs of leadership turnover. The VP of human resources discussed removing the annual evaluation process for leaders, “and not having the time to replace it with anything else right now, but that is something we are working on.” Annual performance evaluations, which should always include performance measures and goals, are an important component to leadership and employee success, as it gives the individual and the supervisor an opportunity to celebrate strengths and successes while also developing a plan for any performance improvements, identifying any training needs, and setting goals (Huebner et al., 2022).

When asked about some of the strategies to retain qualified leaders, the VP of human resources reported that “we are not doing enough, clearly, given the high volume of turnovers. This is mainly due to not having the time to implement so many new ideas and systems to better support and train the leaders.” The strategic plan should include any internal and system needs, not just external growth such as expanding services and programs (Bryson, 2018). During the interviews, the CEO indicated that “the strategic plan is visible for everyone to see on the agency intranet.” The VP of human resources, however, indicated that, while the strategic plan is visible, it is rarely used as a tool in regular leadership meetings, and does not include plans to address turnover, specifically the loss of qualified leaders.

Effective leadership in healthcare is paramount to meeting employee challenges, such as burnout, productivity, and meeting the needs of the clients in which they serve

(Lee et al., 2019). The retention of qualified leaders is crucial in developing the continued growth and success of the employees, and the services in which they provide (Akin, 2020). While leadership turnover is inevitable in any industry, recent studies in healthcare indicate the normal range is 15-17% (Marques et al., 2023). The organization's data was collected directly from the VP of human resources and reported that in 2022, the organization lost 10 leaders, in 2023 9 leaders, and in 2024, the organization had lost 14 leaders. This translates to turnover rates of 25%, 23%, and 65%, respectively. Table 1 shows the number and reason of leadership turnover since 2022, and indicates 34% of leaders left their positions due to changes in the organizational chart, and 45% left their positions due to personal reasons and/or better opportunities.

Table 1

Leadership Changes from 2022-2024

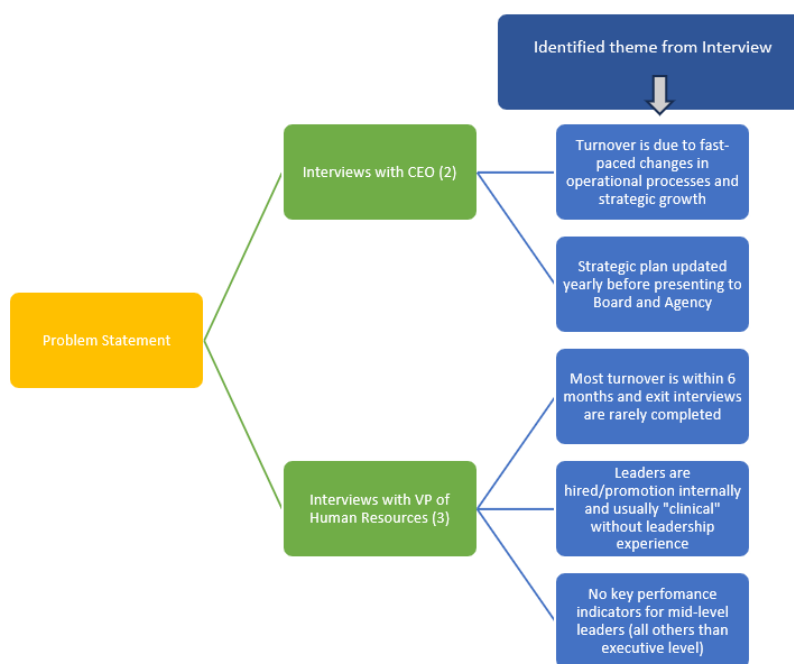
Reason	Number
Position Eliminated	11
Personal/Better Opportunity	15
Performance	4
Other (retired, moved)	3
Total	33

There were differences in opinions of where the issues are with retaining qualified leaders during the interviews with the CEO and the VP of human resources. For example, the themes identified from the interviews with the BHL indicated leadership turnover as expected, and simply due to the demands of the fast-paced changes and growth (personal communication, May 2, 2024).

Furthermore, the CEO reported adequate use of the strategic plan in this same interview, indicating that the plan is serving its purpose of keeping the Board and the organization as a whole informed on general goals, mission, and vision. Figure 1 outlines the key difference during the interviews, when discussing the problem of retaining qualified leaders.

Figure 1

Interview Responses on Retaining Leaders



Retaining qualified leaders can provide stability and structure to an organization, which can positively impact employee performance and service outcomes (Dietsch et al., 2019). The BHL reported that exit interviews are given electronically and emailed to the exiting employee without follow-up from the organization as to participation or any comments given. Additionally, the interview revealed that, during this same time period,

only 3 exit interviews were completed out of 80 given, with only one of those interviews being completed by an outgoing leader (personal communication, November 18, 2024). The average response rate for exit surveys is 30%, however this number is not specific to healthcare as there is no data available for current response rates for outgoing healthcare leaders (An, 2019). The exit interview process for this organization appeared to be part of a formality, rather than taking advantage of an opportunity to identify any experiential themes leading to resignations. Often used as an HR strategy, exit interviews offer insight for better retention overall employee experience (Farmiloe, 2023).

Leadership Workforce and Governance Results

The organization has grown substantially over the past three years; from service delivery areas, programs and services offered, number of staff and leaders, to the operating budget. According to the BHL, the commitment to meeting the behavioral health needs of the community resulted in the organization becoming the region's first structurally integrated healthcare organization, as their focus was developing a better way of providing behavioral health services and increasing access to quality healthcare to community members.

The leadership workforce needs stability to function at its optimal level (Proctor et al., 2019). The BHL reported challenges with their mission of providing quality services, as the organization has experienced problems retaining qualified leaders, especially mid-level leaders, who were identified as supervisors, managers, and directors. The BHL added that leadership turnover is, in large part, due to the organization's focus on rapid movement and the workload, which includes doing more for less to achieve

efficiency (personal communication, December 22, 2023). During the semi-structured interviews, the BHL and VP of human resources both recognized and understood the importance of leadership, but reported lack of planning, executing, and monitoring any type of leadership development plan to retain qualified leaders.

The purpose of a strategic plan is to define and design a roadmap to achieving organizational goals (Welch et al., 2023). During the interview process, the BHL and VP of human resources both recognized that having a strategic plan should include regular assessment of the strategy and execution of the plan. Table 2 highlights the discrepancy between creating a strategic plan versus using it as a guide regularly, which was an area in which the BHL recognized “as being an issue” during the interview process. The BHL reported that the strategic plan is only updated once a year during the strategic planning session where it is then presented to the Board and the organization as a whole.

Table 2

Issues with Creating a Strategic Plan

Year	Meeting Type	Number of Meetings	Strategic Plan Reviewed
2022	Executive Leadership	48	2
	General Leadership	12	1
	Annual Strategic Plan Retreat	1	1
	<i>Total</i>	61	4
2023	Executive Leadership	48	3
	General Leadership	12	1
	Annual Strategic Plan Retreat	1	1
	<i>Total</i>	61	5
2024	Executive Leadership	48	5
	General Leadership	12	1
	Annual Strategic Plan Retreat	1	1
	<i>Total</i>	61	7

The mission of the organization seems to be clear, according to the BHL, however, the leadership plan for successfully and effectively meeting that vision will remain unclear without an action plan (Bryson, 2018). Successful organizational goals are the product of strategic leadership and vision, and despite the complexity of the demands of leaders, they are more likely to balance the long-term goals with the day-to-day priorities if they are strategic-thinking leaders, using tools such as the strategic plan (Walston, 2023). While it is common for organizations to create strategic plans for the purpose of identifying long-term goals, it is also common for challenges in executing their plans, and this is likely due to lack of accountability and implementation planning; strategic goals essentially poorly managed by leadership (Walston, 2023).

Financial and Marketplace Performance Results

The BHL reported that the executive leadership team, which includes the CEO, CFO and VP of human resources collectively oversees the fiscal management of the organization. Financial reports were not extensively reviewed for this study, as the organization lacked financial information specific to leadership recruitment, onboarding, training, and development. Employee turnover costs behavioral health organizations over \$250 million annually, with a median cost of turnover being 24% of a worker's annual wage (United States Department of Labor, Bureau of Labor Statistics, 2018). The BHL and VP of human resources were unable to provide costs of recruiting, hiring, onboarding, training, or any sort of financial impact from leadership turnover, and both reported this as a "problem" that has come to the surface through this case study and interview process.

Implications of Findings

The result of this study is significant because it addresses the gaps in the expectations of leaders with their performance and retention. Additionally, the results of this study could assist the organization by providing solutions to retaining qualified leaders, which could improve organizational productivity, outcomes, and workplace morale (Gregory & Clark, 2019). Although retaining qualified leaders within the organization has presented many concerns, the BHL reported appreciation and support of this study, as an opportunity to improve these issues (personal communication, December 22, 2023). An unanticipated outcome was the gap in executive leaders recognizing the importance of leadership retention with any kind of financial and training plan to measure these goals.

Strengths and Limitations of the Study

Strengths

This qualitative case study explored the phenomenon based on the experiences of the leaders interviewed, data collected, and literature reviewed (Leedy & Ormod, 2019). This was the most appropriate approach to the study, given the organization's challenges in retaining qualified leaders. The study adhered to ethical standards and, despite being a current employee of the organization, all interviews that I conducted with the CEO and the VP of human resources solidified their trust in my professionalism and confidentiality, as they indicated during each interview. Additionally, the participants were willing and appreciative of the opportunity to engage in formal and informal questioning during the exploration of the practice problem.

During the course of the interview process, the CEO and VP of human resources indicated a few immediate changes based on their takeaways from the interview questions, which solidified their ability to recognize and take action when a problem is identified. By reviewing the problem statement at the beginning of each interview, the leaders were able to stay focused on answering the questions from the lens of retaining qualified leaders, rather than discuss the challenges of all employee turnover. This allowed for the questions and answers to be concise and relative to this study, making the most of the interview time. The Baldrige Framework of Excellence was another strength, for not only guiding me through the case study and developing effective interview questions, but also as a shared resource for the behavioral health leader, who asked about this as a “possible tool for us to consider using moving forward” (Personal Communication, May 2, 2024).

Limitations

The literature review was an unexpected limitation, as most research focused on general employee turnover, not specific to retaining qualified leaders and leadership turnover. My bias was a potential limitation to this study, however, it was also a driving force behind identifying the practice problem through lived experiences. Although my bias could have been a risk to the study, measures were taken to ensure my interviews, collection, analysis of data, and literature review were non-discriminatory. Measures consisted of utilizing my classroom discussion posts, discussing any challenges with my peers and my committee chair, as well as having a script before each interview that covered confidentiality, my professionalism, and building off my positive relationship

with the two leaders that were interviewed for the purpose of ensuring ethical and relevant questioning.

Access to requested data was also a significant limitation to this study. Requests for the annual SWOT analysis, costs of employee retention, costs of onboarding and recruiting leaders, leadership meeting minutes, and lack of exit interview results were all “not available or we do not have a way of getting this information”, according to the VP of human resources (Personal Communication, November 25, 2024). This problem became a catalyst, however, as it was a motivator for the leaders “and an eye opener” (Personal Communication, November 25, 2024), which will support my recommendations from this study. Additional limitations to this study include vague answers to requested information. When discussing the number of times in which the strategic plan was used as a tool in executive leadership and general leadership meetings, the VP of human resources offered an estimate of the number, rather than relying on evidence captured in meeting minutes, as those were also not always available.

Summary

The study examined the processes for retaining qualified leaders. Access to information was a significant barrier in identifying the impact of this organization’s leader turnover rates, however, after reviewing research and conducting interviews with the CEO and the VP of human resources, leaders at this organization recognize the seriousness of having high turnover rates amongst all qualified staff, specifically leaders, as it directly impacts employee morale, carries a financial burden of at least 24% of the annual wage (United States Department of Labor, Bureau of Labor Statistics, 2018), and

likely impedes progress towards strategic goals (Espinosa, 2022). The themes identified during the research process, including analysis of the interviews conducted, outlined three significant areas: lack of performance measures, underutilization of the organization's strategic plan, and lack of necessary data to identify areas for improvement. The information gathered in this study supports the need for organizations to address leadership turnover, and the study recommendations will highlight the importance of quality leadership and leadership impact on organizations. These issues will be addressed in the next section.

Section 5: Recommendations and Conclusion

The purpose of this qualitative case study was to identify solutions to retaining qualified leaders. According to the BHL (CEO), the organization is on track for meeting strategic initiatives of statewide growth, service and programming expansion in specific regions, and increasing positive community partnerships. The challenge, however, continues to be the significant turnover rates among all employees, specifically with mid-level leaders, who for the sake of this study, have been classified as supervisors, managers, and directors. Along with researching existing literature specific to the practice problem, I conducted several semi-structured interviews with the CEO and the VP of human resources. After categorizing and analyzing the data gathered from the interviews and research, I developed the following recommendations.

Recommendation 1: Use the Strategic Plan

The study used a qualitative case study research process, which allowed me to gain an understanding of the organization's strengths and weaknesses as they relate to strategic goals. This approach identified the need to regularly evaluate performance measures with strategic planning and goals identified for the organization. This will also ensure that growth and processes align with the organization's mission, vision, and values. While the BHL reported annual strategic planning sessions, facilitated by an independent contractor, the semi-structured interview with the VP of human resources revealed that the strategic plan is "almost obsolete once we leave the strategic planning session, because the executive leadership team rarely uses that document as a guide throughout the year."

Organizations are often versed in developing strategic plans; however, implementation of the plan is often poorly executed due to a lack of clear measures and consistent accountability (Welch et al., 2023). To move from planning to implementation, this organization would benefit from utilizing their strategic plan in every executive leadership meeting, as well as general leadership meetings, as a guiding tool to lead the leadership agendas. Additionally, the organization should implement a matrix used to measure success and identify challenges with each initiative. For example, each initiative should be clearly defined and include who is responsible for that initiative, timelines for the action plan, identify any resources, and plans for regular monitoring of its progress and barriers (Bryson, 2018). Changing the purpose of the strategic plan from an annual meeting to a regularly used action plan will, in turn, support the organization in meeting its goals (Bryson, 2018).

Recommendation 2: Develop Performance Measures

The organization would benefit from developing key performance measures (KPI) that align with specific job descriptions and departmental goals. The KPIs should be used during individual monthly supervision meetings to keep focus on the action plan, identify any successes and challenges, and develop a supportive plan to work through any barriers (McCance et al., 2020). Similar to a treatment plan for a client seeking services, which includes measures and outcomes specific to the goals, the performance measures will be a tool that can serve as a guiding document that is updated as outcomes are met. Developing and implementing annual performance evaluations that align with the mission, vision, and values of the organization is the first place to start with this

recommendation, as it should include areas to identify the individual's strengths, areas for improvement, any training needs, and a plan to achieve the goals.

Recommendation 3: Promote the Importance of Exit Interviews

Organizations that conduct exit interviews are more likely to understand the reasons employees choose to leave their positions. The organization can conduct these interviews to gather employee suggestions for improving work issues and workplace culture, which can increase employee satisfaction and longevity (Brabson et al., 2020). Harboring a growth mindset that focuses on finding opportunities to improve will provide insight into leadership opinions and attitudes toward the organization. Leadership morale can directly impact the mission, vision, and values of the organization (Hallett et al., 2024).

Every organization would benefit from a formal policy regarding exit interviewing, as identifying why employees leave should be an essential part of the strategic plan (Kryscynski, 2021). Studies have shown that developing exit interviews that are confidential, easy to use, and include more open-ended questions will help to elicit more responses rather than the organization's current format of "yes" or "no" answers (Siebelink, 2021). When the employee reports any concerns in their exit interview, follow up is critical and should include an identified human resource employee investigating the issue and reporting back to the appropriate leader with any outcome and findings of the investigation. This process could also include thanking the employee for their time, such as sending a card in the mail to express the organization's gratitude in their participation in providing valuable feedback.

Recommendation for Future Studies

Based on the results of this case study, which included researching existing literature relative to the practice problem, I would recommend that future researchers identify more than one behavioral health organization, similar in size, geographic location, services, and number of employees, to allow for a compare and contrast with regard to hiring, training, ongoing development, assessing, and incentivizing leaders. The process of board engagement has been discussed in this study, and further research on benefits of board involvement with employee retention should be considered in future studies to identify any connection between board engagement with employee and leadership retention. An example could include making the board aware of any leadership retention issues by making this part of a strategic goal or regular HR report shared with the board and studying this avenue of accountability in reporting while reducing turnover rates. An additional recommendation for future studies could include separating leadership from employee turnover. The themes may vary and become convoluted if future researchers include retaining employees, rather than focusing on leadership roles, and therefore it would be my recommendation to isolate the focus to either leadership or employee retention, as done in this study of looking at leadership turnover specifically.

Dissemination Plan

My plan for disseminating the results of this case study is to facilitate a conference call with my committee chair, the CEO, and the VP of human resources of the organization. During this call, I will present my findings and recommendations through an executive summary and PowerPoint presentation. This presentation will include time

for questions and answers. The meeting will conclude with conveying my gratitude and appreciation for their participation in this doctoral study.

Summary

In this qualitative case study, I focused on a large, statewide behavioral health organization that was experiencing high turnover rates in its leaders. The retention of qualified leaders is critical in developing and delivering supportive guidance to employees, whose focus should be on client care and meeting performance measures. The organization needs to offer employees communication and support through effective leadership, and leaders need to receive the necessary guidance and training to deliver these services to their employees (Akin, 2020). Without a clear action plan that aligns with the mission, vision, and values of the organization, leaders are essentially working in the dark, and without measures in place for leading, they are essentially guessing whether their efforts are effective and efficient. Research has shown that leadership and employee performance are closely associated (Suprayitno, 2024). While employees can be negatively impacted by their work environment, the same can be said for a positive work environment, as factors include morale, opportunity, support, work relationships, confidence, and growth (Bachtiar, 2023).

The purpose of this case study was to identify solutions to retaining qualified leaders in behavioral health organizations. Recommendations have been provided, based on data collected and analyzed, as well as literature reviewed, and if implemented, could impact the turnover of qualified leaders in the organization. Recommendations include utilizing the strategic plan as a roadmap and reviewing for progress regularly, developing

individualized performance measures based on leadership job descriptions, reviewing during an evaluation and ongoing supervision process, and promoting the importance of exit interviews for the purpose of continually searching for areas of improvement.

This study will contribute to positive social change by providing organizations solutions to retaining qualified leaders and reducing turnover, as turnover impacts more than the organization; it impacts family income, career adjustments, and possible loss of salary, as well as the possible increased stress of moving jobs (Ensari, 2021). While this is essential to the organization's success, it also further promotes the importance of improving workplace engagement and morale, as this too has a ripple effect on families and communities (Ensari, 2021). In addition, this study addresses the risks and rewards for how understanding and prioritizing quality leadership can impact the entire organization, individual employee performance, client outcomes, and the communities for which they serve.

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