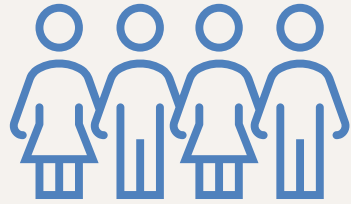


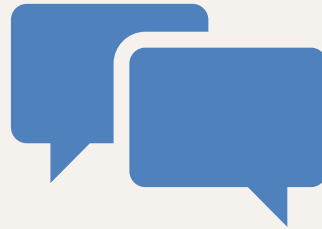
# Matching and Committing For Employee Retention



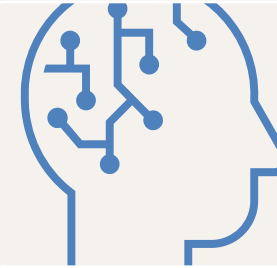
# Core Beliefs of Recruiting *for* Retention



Process and  
Teamwork are Key



Competition is fierce,  
communication  
should be candidate  
driven



Recruitment is both  
a science and an art



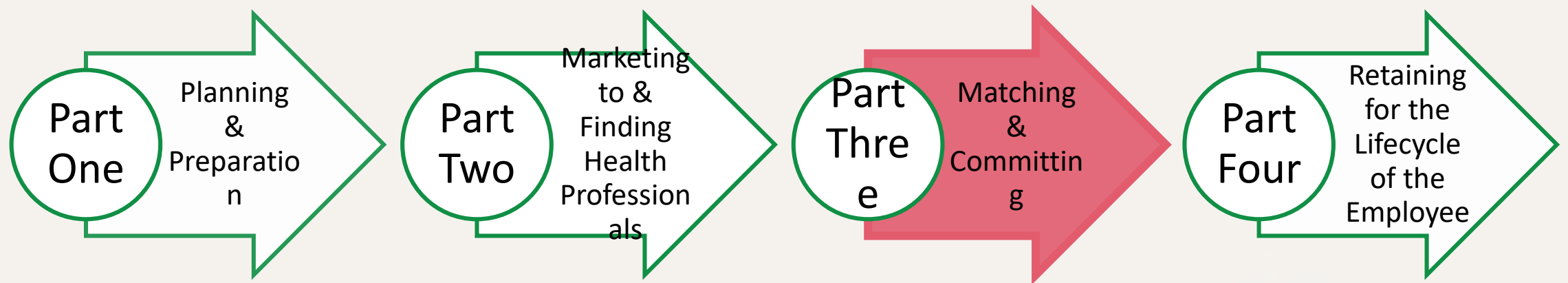
People and Tools  
Exist to help



New Normal: These  
still hold true!



# Four Parts to the Process



# Matching & Committing

- Interviewing
  - Behavior based, team, process, spouse/partner/family
- Bringing them Face-to-Face
  - In person, virtual
- Negotiations
  - Who, how, letter of intent/contract



# Polling Question

- How are you conducting interviews? (check all that apply)
- Virtually
- In person
- Combination of both



# Impact of Covid 19 New Normal



Workforce-Essential  
Employees, Work from Home,  
Layoffs/Furloughs



Virtual Handshake-meeting  
people online for the first time



Interviewing-Virtual  
interviewing and site visits



# New Normal Interviewing

- You will most likely be conducting Virtual Interviews
- Establish your preferred virtual meeting format.
- Establish Communication Preferences
- Prepare your staff and candidates for the virtual interview
  - Test Tech, offer Tip Guide
  - Minimum distractions
  - Set Expectations
  - Remember Generational Differences in Virtual Interviewing
- Preparation is key
- PRO: Can schedule many more interviews less time!

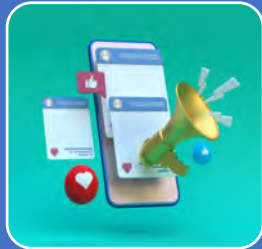


# Before the Interview



## Everyone on board?

- Team
- Peers
- Leadership



## Communication Preference

- Text?
- Email?
- Phone?



## Administration in place

- Contract/Letter of intent
- Compensation
- Job Description







# Job Seeker's Perspective

---

- Questions the job seeker would like to have answered:
  - Did you like the culture of the practice and the people you met? Can you see yourself enjoying working with them?
  - Do you see yourself being excited and challenged in the role?
  - Did you get a chance to see the community? What was your experience like?
  - Did you have any concerns (practice or community)?
  - What are the next steps?
- *How do your questions answer theirs?*



# Multiple approaches for interviewing

- Behavior-based interview questions – high value but not always providing a full ‘picture’ of whether the candidate fits your need
- Data gathering/fact finding – does the candidate meet your minimum requirements, do you meet candidate’s minimum requirements, etc.
- Open-ended questions – opportunity for candidate to share in a less ‘directed’ fashion

# Case for Behavior- Based Interviewing

- Premise---Past behavior is the best predictor of future behavior
- Not a new concept but becoming more and more prevalent in use
- Minimize the 'halo' effect and subjectivity
- Collect meaningful information about possible cultural 'fit' for your organization.



# The Essence of the Questions

- More than just an 'open-end' question
- There are no 'magic' questions
- Frequently used question 'starters'...
  - “Tell me about a time...”
  - “Describe for me...”
  - “Give me an example of ...”
- **Bottom line—ask for a specific example of a situation or task, learn the action taken and get the result!**



# Interview Tips for Behavioral Health Professionals

## Safety

- Safety protocols
- Patients
- Covid

## Mission

- Real life examples of making a difference
- Performing at the top of their licensure

## Flexibility

- Remote work
- Flexible schedules
- Work/life balance



# Polling Question

- Do you conduct an interview of the spouse/partner?
- Yes
- No, haven't thought of it



Interview the  
Spouse/Partner

---

Excellent Interpersonal Skills

---

Know the Community well

---

Share a common interest





# Interview the Spouse/Partner

- The type of information that you should gather includes:

## Geographic

- Climate
- Recreation
- Housing
- Schools

## Professional

- Education
- Career
- Volunteer

## Personal

- Location of family/friends
- Knowledge of opportunity
- Hobbies





# Interview the Spouse/Partner

- Conducting a Spouse/Partner interview can be a great recruitment and retention tool.
- The person conducting the Spouse/Partner interview should have:
  - Excellent interpersonal skills
  - Knows the community really well
  - Share a common background or interest with the spouse/partner
- The type of information that you should gather includes:
  - Personal education needs
  - Personal interest
  - Housing preference
  - Location of family/friends
  - Geographic and climate preferences
  - Knowledge of the opportunity
  - Why your community interest them

# Impact of Covid 19 New Normal



Workforce-Essential  
Employees, Work from Home,  
Layoffs/Furloughs



Virtual Handshake-meeting  
people online for the first time



Interviewing-Virtual  
interviewing and site visits



# New Normal Site Visit

The onsite interview may look very different than it did just a few months ago.

## Things to keep in mind:

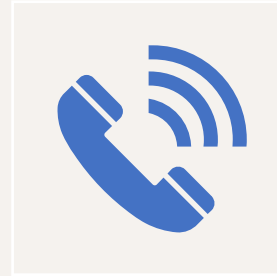
- Communicate safety precautions/expectations to make candidates feel comfortable and current employees
- Consider virtual tours of facilities, locations, schools, real estate
- Set up Zoom meetings with recruitment teams, community recruiters (bankers, real estate, superintendent of school)

If the interview or “site visit” will be all virtually then have more than one meeting to determine fit

# New Normal-Site Visit



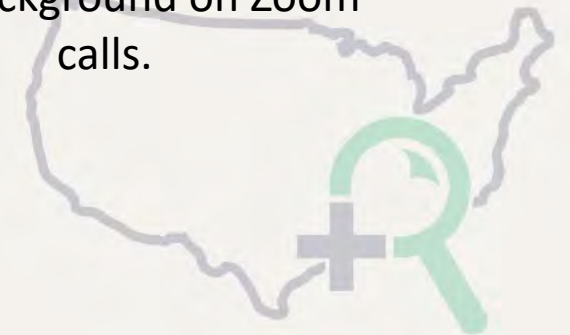
If your facility is closed on weekends, take a tour then to help with social distancing and Covid 19 protocols.



Give a community tour by having the candidate follow in a vehicle behind and utilize speaker phone.



Use a picture of the facility as your background on Zoom calls.



# Site Visit

- Things to consider before you schedule:
- Who is invited to your site visits (Spouse, kids, grandparents, etc.)
- What will you reimburse for and how it that reimbursed (examples: airfare, baggage fees, hotel room, tax, valet parking, meals, mileage, airport parking, baby sitting, dog boarding, yes, indeed, dog boarding).
- Who will make the travel arrangements
- Be sure to ask about dietary restrictions
- Covid Restrictions



# What motivates a candidate

- Professional Motives: Income, facilities, personal, colleagues, commute\*, workload, call\*
- Personal Motives: location, lifestyle, call\*, commute\*, recreation, urban/suburban/rural, family, friends, culture/religion, community



# Site Visit





# Key Areas to include in a site visit:

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- Public or private schools
- Childcare facilities
- Fitness facilities
- Restaurants, cafes and bakeries
- Coffee shops
- Grocery stores and farmers' markets
- Retail stores
- Sports, training and recreation facilities
- Arts guilds, theater groups or dance academies
- Churches
- Area parks and outdoor opportunities

## Site Visit Other Ideas

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- Experience a unique event in your area
- Realtor tour of homes that they could see themselves living in
- Sporting event with a group
- Festivals, fairs etc.







# Negotiations

---

- Be prepared to make an offer! Use a letter of intent or contract
- Follow up within 48 hours with a thank you message based on communication preferences include:
  - Links to festivals
  - Photos of time spent in community
  - Letters or testimonials from employees
- If the candidate is still undecided the negotiator must identify and address reservations right away
- If you get a “no” find the specifics about why and if you can eliminate barriers or offer solutions for the next candidate do so.



# Retaining for the Lifecycle of the Employee

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- Onboarding
- Engagement Surveys
- Stay Interviews
- Succession Planning
- Work/Life Balance
- Compensation Surveys
- Total Compensation Statements
- Communication

# Retaining for the Employee Careercycle



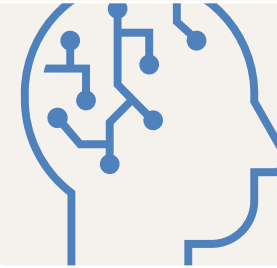
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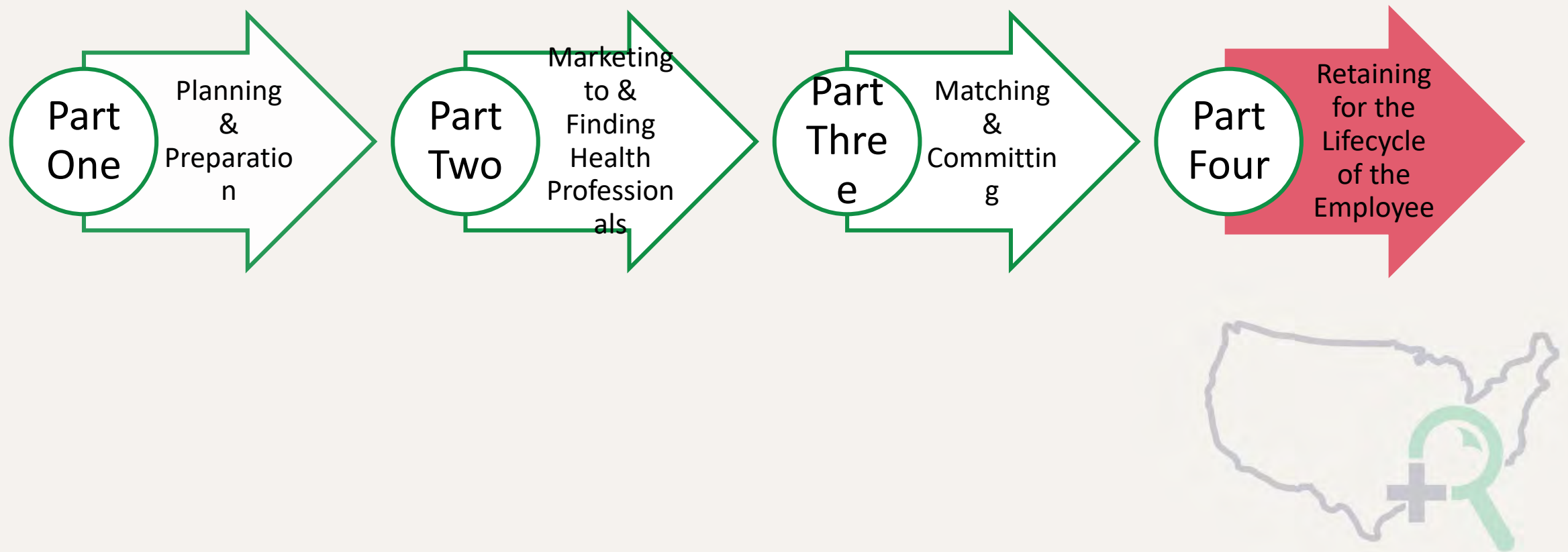


New Normal: These  
still hold true!





# Four Parts to the Process



# Retention Principles



Retention success is possible in any geographic location



Retention starts in Recruitment



Retention is about good fit



No one stays in a bad job, leadership is key

# Retaining for the Employee Lifecycle

- Onboarding
- Engagement Surveys
- Stay Interviews
- Succession Planning
- Work/Life Balance
- Compensation Surveys
- Total Compensation Statements
- Communication





# A New Normal

Covid 19 has disrupted your workflow, staffing, recruitment, retention etc. It has affected how you run your business, how you communicate, use new technologies and rely on your managers

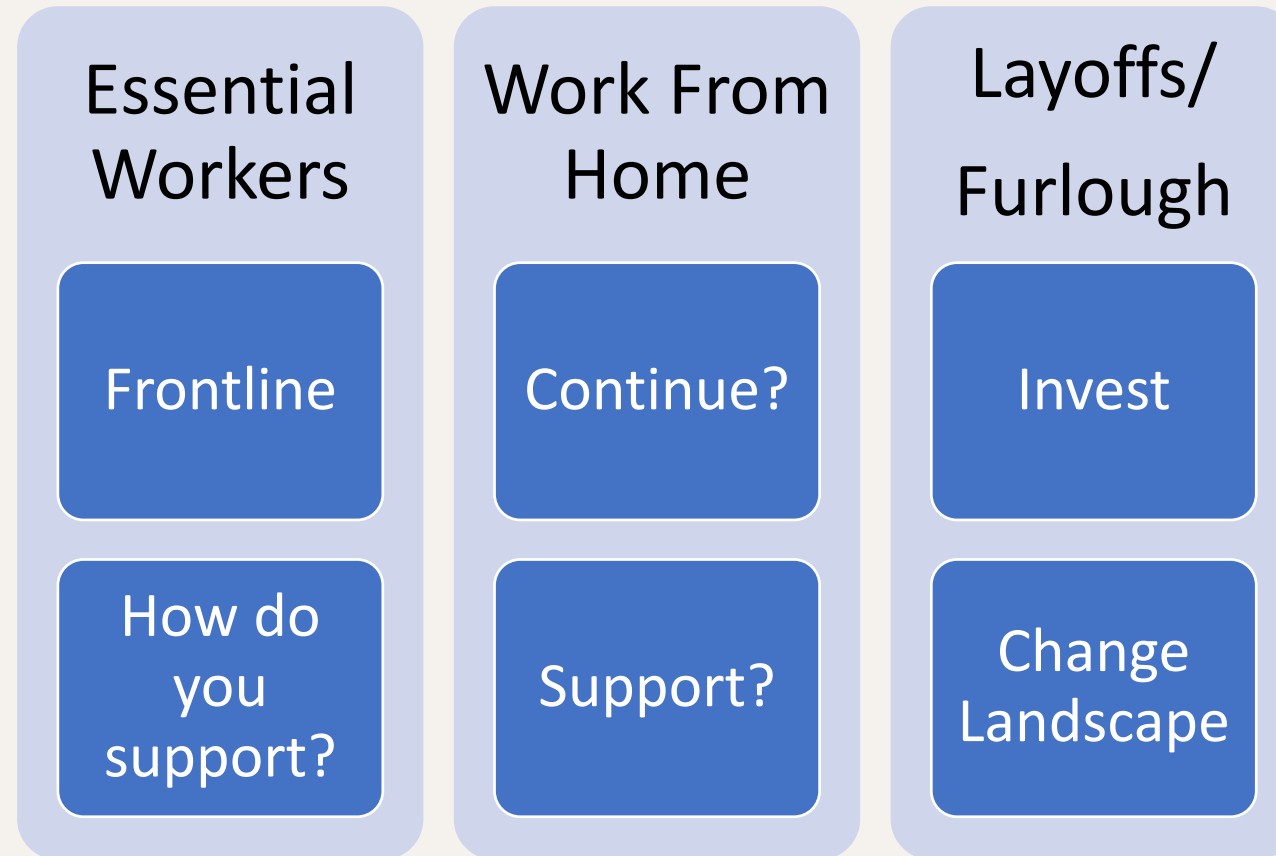


# Polling Question

- How many of you have the following in your workforce as a result of Covid 19? (check all that apply)
  - Essential Employees (those on the frontlines)
  - Work from home
  - Furloughed or laid off employees
  - Voluntary Quits



# A New Normal



# Re-Recruit

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That's right....re-recruit! Guess what...that \$10K sign on bonus you are offering for new RN's, other companies are offering those to your currently staffed RN's. How will you re-recruit them to stay?







# Work From Home

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- Ideas:
  - For those homeschooling as well-be flexible, understand noises, interruptions will happen
  - Give grace to schedules, don't clock watch, priorities change quickly
  - Set up "virtual watercoolers" to combat isolation and out of sight out of mind fears
  - Communicate, set calendar reminders to chat, stay connected, share ideas about more than work ie kids, recipes.
  - Stress Management, establish routines, share own concerns, validate/have empathy, have a virtual lunch, leverage EAP

# Before you Furlough or Layoff

Consider

Job Share  
State Programs

Cross Train

Department  
Workflows

Implement

Workflows  
Contingency Plans

# Before you Furlough or Layoff

- STAFF Utilization recommendations
- All Staff
- Pay some staff to continue working remotely from home instead of using continued lay-offs or furloughs
- Stagger staff to create a three-shift coverage
- Pay for on-call staff coverage
- Offer a night shift schedule
- Offer a split shift schedule for those with childcare or other concerns that limit full 8 hours dedicated time to work
- Implement shorter shifts and provide full week pay
- Administrative Staff – multidisciplinary (HR, Admin, Billing, C-suite)
- Prepare for next OSV
- Update practice policies and desk procedures
- Develop online training sessions between staff
- Focus billing staff on denied claims work activities and educate on temporary coverage/billing guidance documents from payers
- Apply for additional grants/funding related to COVID-19 response and preparation
- Clinical Staff
- Pay for staff to conduct telephonic visits without concerns associated with costs
- Prepare for upcoming Medicaid SDOH screening by doing screening now and integrate into workflows
- Initiate direct outreach calls to patients to remind them of safety precautions during pandemic such as social distancing, medication refill strategies
- Perform controls/maintenance on machines/equipment
- Allow providers to have “catch up” charting time



# Before you Furlough or Layoff

- STAFF Utilization recommendations
- Ancillary Staff
- Catch up on scanning
- Do deep clean at all health center sites
- Encourage distance-learning options, especially those related to UDS measure topics, care management, and re-certifications/licensure education opportunities
- Develop/improve upon pandemic and emergency response protocols
- Engage in communications/social media outlets to run donation drives for PPE and cleaning supplies
- Participate in local, state, and national coalitions on COVID-19, especially among special populations: farmworkers, homeless, public housing, refugees, veterans (strengthen relationships and offer services if patient count is low!)
- Engineer new protective measures inside the clinics (plastic screens for front desk, isolation rooms, creating signs to direct patient flow through the clinic, etc.)
- Screen, flag, and establish periodic follow-up contacts with patients with pre-existing conditions or within age ranges that are most “at-risk”
- Update educational materials, advocacy for policy change, and other programmatic development materials among outreach programs
- Evaluate referral needs and identify potential gaps in resources for patients to concentrate efforts on
- Outreach & enrollment
- Promote Special Enrollment Period for individuals who have lost job-based health insurance and assist them with enrolling in a Marketplace plan.
- Assist individuals w/ Medicaid enrollment who may be newly eligible.
- Assist current Marketplace consumers w/ updating income/other info in their Marketplace applications to see if they qualify for PTCs and/or CSRs.



# What you can do!

- Keep Mental Health a Priority
- COMMUNICATE, there's no such thing as over communicating. Be honest- you don't have all the answers
- Flexibility is key, Measure Results NOT Time
- Adjust PTO policies
- Create or update Business Continuity Plan and Contagious Disease policy
- Schedule Routine Check-ins
- Go Above and Beyond
- Focus on what you or the team can control





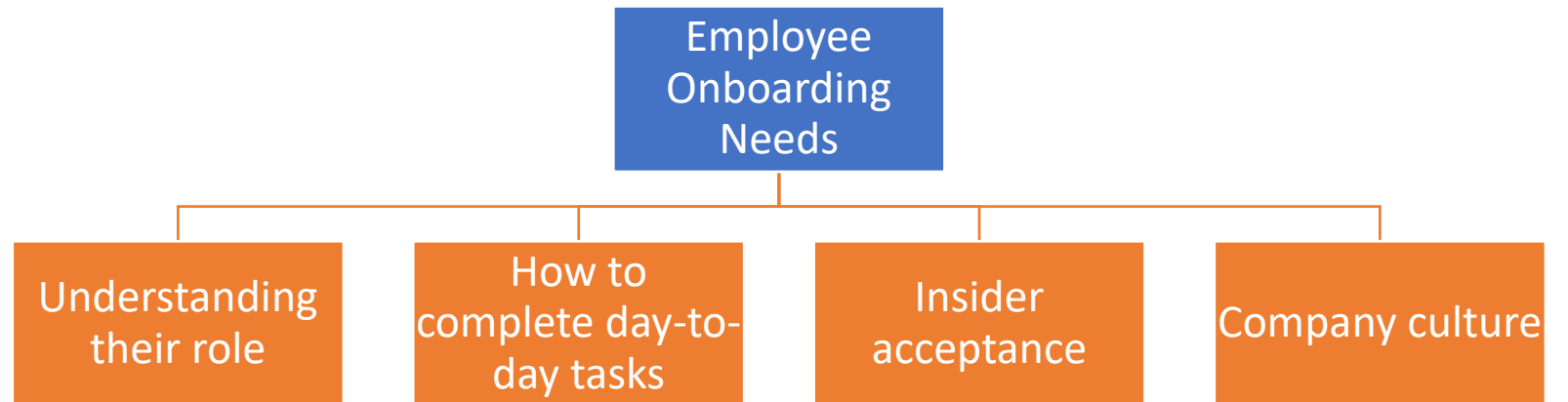
# Onboarding

- Onboarding is not a new name for employee orientation (however orientation is an important part of onboarding).
- Onboarding is broader, encompassing both what the organization and the new employee provide to each other.
- The ultimate goal is to achieve an excellent fit for both.





# Onboarding



# Onboarding

## Orientation

- One time event
- Typically lasts one to two days
- Focuses on organization's mission, structure and policies
- Includes review of employee handbook
- Facilitates completion of payroll/benefits paperwork

## Onboarding

- Is a systemic process
- Can last three to 12 months, depending on person
- Promotes better understanding of organizations culture, mission & goals
- Cultivates long-term relationship building and access to information
- Fosters a feeling of belonging



# Polling Question: Who is the first person to meet the new employee on their first day?

- Receptionist/front office person?
- CEO
- Medical Director
- HR





# Onboarding

- Ensure a good first impression
  - Use a checklist to ensure the new employee has everything they need, i.e. passwords, supplies, etc.
  - Make sure the staff know when the new employee will be arriving and what they are expected to do for the provider.



# Onboarding

---

- Items to ease anxieties:
  - Housekeeping
  - Employee Paperwork
  - Tasks/Expectations
  - Relevant Documents
  - Pay Procedures
  - Organizational Practices



# Onboarding

- Someone to help the employee get to know the culture of the company.
- Can be from a different department and/or level than the employee.
- Helps acclimate the employee over the next year to social activities of the organization. For example, we have a fundraiser in February and wear jeans on Fridays.
- Research has shown that having someone to ask daily questions such as, "How do I order supplies?", speeds up the onboarding process and makes the employee feel welcomed.

## Buddy



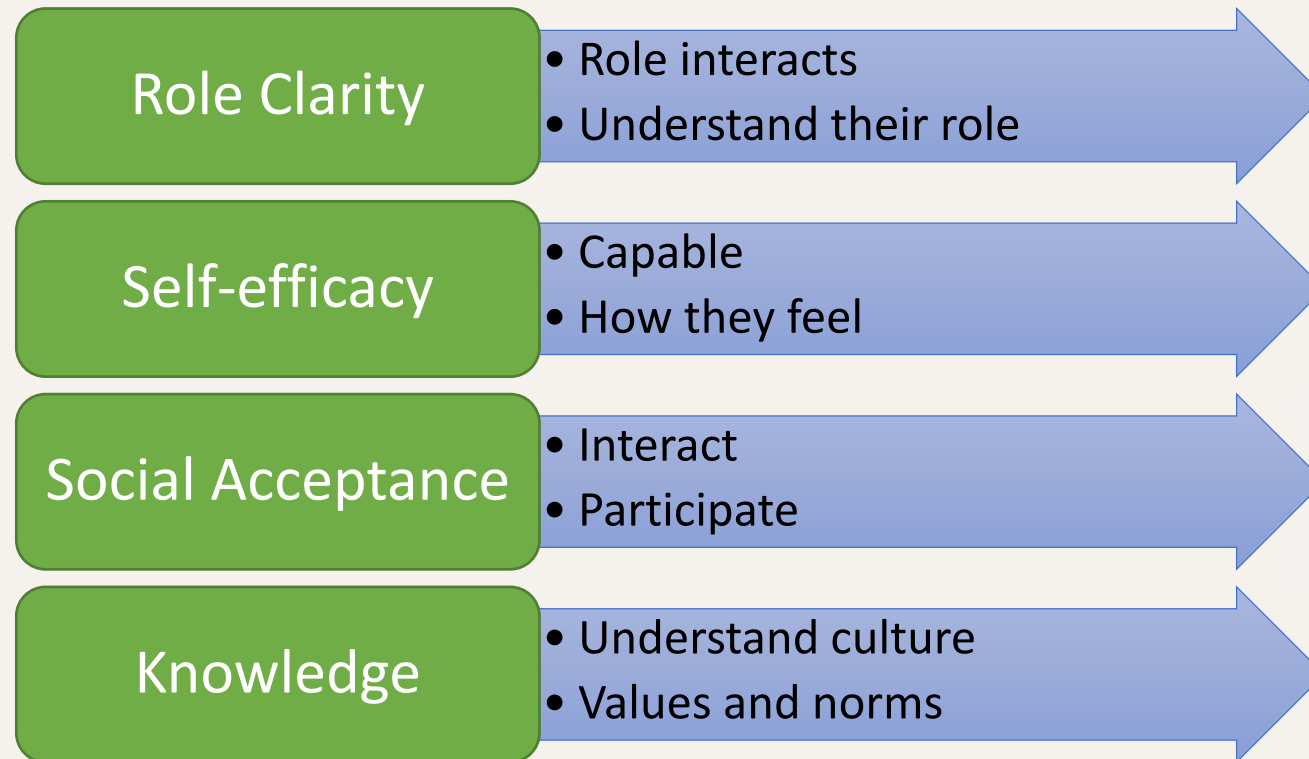
- A peer who can help navigate the processes and procedures associated with job functions.
- Can act as a Buddy at times
- Better to have Buddy from an outside department. This can lead to cohesiveness across departments.

## Mentor



# Indicators of a Successful Onboarding

- Research has found that the following four indicators suggest that an onboarding program is accomplishing its objectives.



# Polling Question: How do you know what challenges your employees are facing?

- They tell us
- They don't have any?
- Social Media
- We have a don't ask don't tell policy





## Employee Engagement/ Satisfaction Surveys

- Surveys are a more formal process to assess the engagement of your providers.
- It is critical to follow up on the results of the survey and COMMUNICATE the actions that will take place from the results of the survey.
- Surveys should include questions about Community, Goals, Clinic, Leadership, Engagement, Development

# What happens after the survey?



## **Communicate**

All Results



## **Action Plan**

Implement



## **Communicate**

Actions



## **Communicate**

Nonactions



# Employee Engagement/ Satisfaction Surveys

- Resources for surveys
  - Surveymonkey.com, they have hundreds of questions specifically for employee engagement surveys
  - AMGA and AAFP have provider specific surveys
  - Google for surveys you will find sites like Cultureamp.com, who has questions and benchmarking data
  - Industry associations like your PCA or Hospital Association may conduct surveys and offer benchmarking data



# Polling Question:

- How many of you have heard of or conduct Stay Interviews?
- Yes
- No





Why do you still work  
there?

# Stay Interviews

- Stay interviews are conducted to help managers understand why employees stay and what might cause them to leave.
- Stay Interviews are “informal” interviews and work best when they are not put in a structured format.
- Stay interviews should build trust between managers and direct reports.

# Stay Interviews

- Benefits to Stay Interviews
  - Associates hear directly from you, their leader, that you care and that you wish for them to stay and grow with the company.
  - Associates are more likely to accept responsibility for staying.
  - Stay interviews build trust.
  - Equips you to anticipate, learn and solve associate concerns to the best of your ability and while the associate is still onboard!
  - Improved retention and productivity!

# Stay Interviews

---

- Engagement Facts
  - Trust between each leader and his/her direct reports is the absolute most important ingredient for building loyalty and engagement.
  - Poor leadership causes over 60% of all employee turnover. (Saratoga Institute)
  - How associates view their leader impacts how they view everything about their employment relationship!







# WE WANT YOU

## Guidelines of Stay Interviews

In person*		
Set Expectations	Plan your conversation	Ask Questions

# Stay Interviews

- Typical Questions
  - Why do you choose to stay at XYZ?
  - Why might you leave or what may entice you away?
  - What is most energizing about your work?
  - What more do you want to learn?
  - Are we fully utilizing your talents?
  - What are your career goals?
  - What, if anything, is inhibiting your success?
  - How can I help?
  - What can I do differently to better assist you?





# Stay Interviews

---

- Create a Stay Plan
  - What actions can be taken to achieve goals and address concerns/challenges
  - Who is responsible for what
  - Agree on timeframes
  - Determine what is most important to the associate
  - Be clear on areas where the answer is “no”
  - Follow Up
  - Leaders should follow up on all stay plans
  - Can occur during weekly or bi-weekly connection meetings

# Succession Planning



Adapt to Talent  
Scarcity



Identify Skills  
gaps/training



Retaining  
institutional  
knowledge



Retention



Replace unique skills



# Succession Planning

- Potential Obstacles
  - Resistance to change
  - Lack of support by persons of influence
  - Organizational silos
  - Equal Employment Opportunity
  - Weakness in performance management
  - Manager Resistance
  - Lack of time
  - Rewarding wrong behavior

# Succession Planning

- Action Steps:
  - Establish open communication
  - Examine and refine current goals
  - Review Organizational chart
  - Promote professional training
  - Allow designated time for employees to shadow
  - Create a mentor program
  - Foster open promotion practices
  - Match job functions to employee strengths
  - Lead the way





# Succession Planning

- Components of Great Programs
  - Prepare leaders to participate
  - Align program with the business objectives
  - Uses a variety of methodologies
  - Incorporate performance management
  - Plan for knowledge transfer
  - Job development is not limited to promotion



# Staffing Needs

---

- Not just a recruitment activity any longer, what does your workforce look like post COVID 19
- Look for areas where there is understaffing to avoid burnout
- Utilize departments that maybe fully staffed or slightly overstaffed to conduct cross-training or succession training
- Know your turnover rates
  - Retention Calculator  
<http://nhsc.hrsa.gov/currentmembers/membersites/retainproviders/>



A person is fishing in a river. The person's hands are visible, holding a fishing rod with a cork handle and a reel with green line. The river is flowing, and the background is filled with trees with yellow and orange autumn foliage. The sky is clear and blue. A semi-transparent white circle is overlaid on the left side of the image, containing the title and list.

# Work/Life Balance

---

- Flexibility in schedules
- Time off to enjoy hobbies
- Work sponsored activities outside of the facility i.e. softball teams, movie nights
- Work is a part of life it shouldn't be a culture where work and life battle
- Engage in Wellness strategies



# Compensation Surveys

- Conduct Annually
- Develop Career Ladders, yes even in small facilities
- Create TCW, total compensation worksheet, to show employees how much you value them
- Sources for surveys, AAFP, NACHC, national and state associations, SHRM
- Use data to justify increases or added benefits
  - Turnover calculator
  - <http://chcworkforce.org/star%C2%B2-center-financial-assessment-tool>

# Total Compensation Statements

- TCS are a great way to show your employees how much you value them.
- A TCS can allow you to share all the direct cost you have for the employees, these are items that the employee most likely knows about such as pay, taxes, bonuses etc.
- However indirect costs or “hidden” cost can be easily shown and give the employee the full picture of their compensation.

# Total Compensation Statements

- Common items to include in the:
  - Salary/hourly rate
  - Bonuses
  - Health benefits coverage—include amount paid by employee and employer
  - Flexible spending account information
  - Paid leave—include vacation/sick/PTO, holiday, personal, bereavement, military pay, jury duty, etc.
  - Disability insurance
  - Life insurance
  - Employee assistance program
  - Retirement benefits—include 401(k)/403(b), pension plans, etc.
  - Educational assistance programs
  - Relocation expenses
  - Learning and development offerings
  - Career-advancement opportunities
  - Unique Benefits such as cell phone discount programs or gym memberships
  - Payroll Taxes
  - Workers' Compensation



# Total Compensation Statements

yourCompany

123 Main Street  
Atlanta, Georgia 12345

your total compensation report for 2015

Mary L. Smith  
123 Home Address  
City, State 12345

Confidential Information Enclosed

We are pleased to provide you with this personalized total compensation statement for 2015. It is our sincere hope that the protection and security of these benefits will make life better for you today as well as provide you with a more secure future.

Your employee benefits contribute greatly to your annual compensation and to your personal well being. This statement not only gives you a brief summary of your personal benefit elections, but also provides "costs of benefits" information, which is important when considering your total compensation.

We are constantly working to provide you with a benefit package that is competitive and progressive within our industry and our community. We appreciate your service and dedication to the company.

Value of your 2015 Total Compensation Package from yourCompany

	company cost
<b>Earnings:</b>	
Current Annual Income	\$39,172.22
2014 Bonus	\$400.00
<b>Total Earnings</b>	<b>\$39,572.22</b>
<b>Benefits:</b>	
Total Employer Provided Insurance	\$9,767.64
Statutory Benefits	\$3,255.41
Health Savings Account	\$1,500.00
401(k) Retirement Match	\$1,175.17
Cell Phone Allowance	\$600.00
<b>Total Employer Provided Benefits:</b>	<b>\$16,298.22</b>
<b>Your Total Compensation</b>	<b>\$55,870.44</b>

earned income65.7%

company paid benefits29.2%

time off5.1%

yourCompany

personalized for: Mary L. Smith

Summary of Your Compensation & Benefits

Employer Provided Benefits:		company cost
Medical	HDHP plan - family	\$8,498.04
Dental	family	\$818.64
Short-Term Disability	60% of weekly pay	\$135.60
Long-Term Disability	60% of monthly pay	\$219.36
Basic Life & AD&D	two-times earnings	\$96.00
401(k) Retirement*		\$1,175.17
Social Security & Medicare		\$2,905.41
Unemployment		\$227.00
Workers' Compensation		\$123.00
Cell Phone Allowance		\$600.00
Health Savings Account		\$1,500.00
<b>Total Benefits</b>		<b>\$16,298.22</b>
<b>Time Off:</b>		
Paid Time Off	10 days	\$1506.62
Holidays	8 days	\$1,205.30
Floating Holiday	1 day	\$150.66
<b>Total Time Off Value</b>		<b>\$2,862.58</b>
(included as part of base annual income)		

earned income65.7%

company paid benefits29.2%

time off5.1%

contacts:

Medical  
Dental  
401(k)  
LTD/STD  
Cancer  
Accident

website:  
bebst.com  
deltadental.com  
jhpensions.com  
unum.com  
aflac.com  
aflac.com

phone:  
800-565-9140  
800-225-3104  
800-395-1113  
800-421-6344  
800-992-3522  
800-992-3522

Employer Provided Benefits & Time Off:

- Medical & Dental: Your Company pays a substantial portion of the cost for your medical and dental insurance.
- Life & AD&D Insurance: Provides 2 times earnings to a maximum of \$200,000.
- Short-Term Disability: After the waiting period, you may be eligible to receive a weekly benefit of 60% of eligible earnings to the maximum weekly benefit.
- Long-Term Disability: After the waiting period, you may be eligible to receive a monthly benefit of 60% of eligible earnings to the maximum monthly benefit.
- Social Security & Medicare: Both employers and employees are required to pay taxes to help fund Social Security and Medicare (FICA taxes). Your Company's estimated share is shown.
- Workers Comp & Unemployment: Your Company pays 100% of the cost as required by current laws.
- 401(k) Retirement: Your Company will match \$50 for every \$1.00 you contribute up to the first 6% of your salary (after six months of service).
- Health Savings Account: Your Company contributes \$1,500 annually to your HSA.
- Time Off: Paid Time Off is earned based on your length of service.

About your Statement:

The actual determination of your benefits is based solely on the plan documents provided by the carrier of each plan. In case of a discrepancy between this statement and the plan documents, the plan documents will prevail.



# Unique Benefits

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- What can you offer that is unique?
  - Example: Your area has great hunting/fishing and your provider enjoys hunting/fishing, what can you offer?
    - Do you offer time off to enjoy this activity?
    - Do you pay for their hunting/fishing license?
    - Can you get a discounted rate with a local outfitter?
    - Don't forget to include in TCW (total compensation worksheet)

# New Normal Unique Benefits

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- Culture
- Safety
- Stress Management
- Communication
- DEI
- Work types (changes in shifts, rotations, teams)
- Loyalty programs
- What about future benefits?





# Rural Specific Retention Strategies

- Sponsoring periodic social gatherings of the medical staff, their spouses and families
- Assigning someone to orient and help integrate the spouse and family to the community
- Keeping the call schedule light – one out of every four days or less, if possible
- Funding career and personal development opportunities for the provider and spouse
- Providing opportunities for peer interaction outside the community
- Developing telecommunication links to practitioners in other communities and to medical education and support resources





# Takeaways

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- Utilize all your screening tools to make sure you have the right fit
- Interviewing looks very different now, don't shy away from virtual interviews
- Sell your Unique Selling Points in the interview process
- Don't forget your community
- Make the offer!
- Communication and stress management are critical in the current situation and going forward
- Retention is for the entire lifecycle of the employee
- Retention starts in recruitment
- Build trust, relationships lead to lasting employee engagement
- Retention may not be the objective, not every hire will be a fit.



**Questions?**



# Thank You!

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Thank  
you! 