



Stay Interview Toolkit

This toolkit was developed to assist managers and supervisors at the Public Health Institute at Denver Health (PHIDH) in implementing stay interviews as a staff retention strategy.¹ Managers are encouraged to use the toolkit as a resource guide, drawing from its recommendations and best practices to customize and conduct the stay interview process to suit their teams' needs and capacities. It is not necessary to complete every component included in the toolkit; rather, managers interested in implementing stay interviews should select the elements that best fit their specific situation. While stay interviews are recommended as a valuable practice, they are not required.

This toolkit was created by PHIDH in 2024.²

¹ For guidance on customizing the Toolkit to your department or organization contact Kim Findley at kim.findley@dhha.org.

² Thank you to Helen Burnside, Tai Edward Few, Kim Findley, Judith Shlay, and Armen Tumanyan for their work creating and editing this Toolkit.

Table of Contents

Frequently Asked Questions.....	1
Introduction.....	2
Conducting Stay Interviews.....	2
Timing	2
Participation.....	3
Format of Stay Interviews	3
Communicating with Staff.....	3
Best Practices for Interviewers	4
Designing Effective Interview Questions/Guides.....	6
Stay Interview Follow-Up.....	7
Communicating Findings.....	8
Appendices	9
Appendix A: Checklist.....	9
Appendix B: Interview Request Email.....	11
Appendix C: Opening Script.....	12
Appendix D: Interview Note Sheet	13
Appendix E: Summary Report	14
Appendix F: Brainstorming and Prioritization Tools	15

Frequently Asked Questions

Q: Who can managers reach out to for guidance or support in conducting stay interviews?

A: The Office of the Director can provide support for managers or teams interested in implementing stay interviews. Please reach out to Kim Findley (kim.findley@dhha.org).

Q: Are PHIDH program areas and managers required to conduct stay interviews?

A: Stay interviews are not required, but they are encouraged as a proactive method to enhance employee retention and engagement. While participation is voluntary, these interviews offer valuable insights into job satisfaction and areas for improvement. Managers play a key role in creating an open environment for feedback and using it to drive positive change within the organization.

Q: How much time should managers allocate to conducting stay interviews?

Each stay interview should last 15 to 20 minutes. However, managers should also allocate additional time for preparation, such as reviewing the interview questions and scheduling, as well as time for post-interview analysis of the feedback. While the interview itself is relatively brief, managers should plan for follow-up actions, which may include identifying themes, sharing findings with the team, and collaborating on next steps. The overall time commitment will vary depending on the number of interviews conducted and the depth of follow-up required.

Q: What level of follow-up should managers commit to after conducting stay interviews?

A: Managers should assess their capacity to commit to follow-up actions based on the insights gathered. The level of follow-up can vary depending on resources and timing; it might include sharing highlights of the findings with the team, holding discussions, or implementing specific changes. While follow-up is important to demonstrate that feedback is valued, managers should be realistic about what they can manage and communicate clearly with employees about the next steps.

Introduction

A stay interview is a conversation with employees to explore the aspects of their role and the organization that contribute to their daily motivation, engagement, and satisfaction. It aims to uncover both what keeps employees engaged and potential areas for improvement that could impact retention. Stay interviews adopt a strengths-based approach to enhance employee engagement. Unlike formal exit interviews and performance reviews, stay interviews are typically more informal.³ Stay interviews can benefit teams in several ways:

- **Enhance employee retention:** By proactively understanding the factors contributing to employee satisfaction and addressing potential issues.
- **Improve organizational culture:** Through open communication and active listening, fostering a supportive and engaging work environment.
- **Support strategic human resources decisions:** By providing actionable insights that inform policy and decision-making.
- **Build trust and transparency:** Strengthening relationships between employees and management through genuine dialogue and responsiveness.

Conducting Stay Interviews

This section reviews the factors to consider when preparing for and conducting stay interviews. A stay interview checklist is included in [Appendix A: Checklist](#).

Timing

It is valuable to conduct stay interviews regularly, though the exact timing may vary. Stay interviews should not be tied to performance reviews and should be scheduled separately.⁴ PHIDH recommends that stay interviews be conducted annually. Stay interviews should not be conducted only when there is a retention issue but as a proactive strategy to strengthen employee retention.

³ Verlinden, N. (2024, June 12). Your in-depth 2024 guide to stay interviews (plus best questions to ask). AIHR. <https://www.aihr.com/blog/stay-interviews/>

⁴ Finnegan, R. P. (2023, December 21). Stay interview how-to: Core features and advantages. SHRM. <https://www.shrm.org/topics-tools/news/employee-relations/stay-interview-how-to-core-features-advantages>

Managers can strategically schedule stay interviews to align other retention-related initiatives. For example, conducting the interviews following the employee engagement survey can provide insights into areas with high or low scores. Alternatively, scheduling them to align with a staff retreat allows for findings to be discussed during the event.

Participation

To foster a more inclusive and comprehensive feedback process, the entire team should have the opportunity to participate in stay interviews. By doing so, managers can gather insights from a diverse array of lived experiences and perspectives. Importantly, participation in the interviews should be voluntary; allowing employees the choice to engage fosters a more comfortable environment, encouraging them to share their feedback openly and honestly.

Format of Stay Interviews

Stay interviews should not take longer than twenty minutes to complete. They can be offered in person or virtually. Typically stay interviews are one-on-one discussions between a staff member and the interviewer.

Managers could consider providing employees with a structured set of questions or a survey to complete before the interview. This allows staff to respond thoughtfully and thoroughly. The interview time can then be utilized to explore these responses in greater depth and gather additional insights.

Stay interviews can be conducted by managers or designated individuals. For instance, in 2022, an intern at PHIDH conducted stay interviews as a component of their work. Having managers conduct stay interviews can show employees that their supervisors care about hearing feedback and retaining staff. Managers are also in the unique position of closely understanding the demands of the day-to-day work of their teams.

Communicating with Staff

Managers conducting stay interviews should take some time to introduce the process to staff. This could involve including stay interviews as an agenda item on team or staff meetings to explain the process. It may also be helpful to send an email that includes a description of the interviews, the interview questions as an attachment, and a request

for recipients to schedule a time for their interview. An example email can be found in [Appendix B: Interview Request Email](#).

Best Practices for Interviewers

This section includes some recommendations for staff conducting stay interviews. An example opening script for interviews is included in [Appendix C: Opening Script](#).

Maintaining neutrality and confidentiality

Interviewers should maintain impartiality throughout the process and avoid making commitments they cannot guarantee.

Interviewers should do their best to maintain confidentiality during the process. Interviewers should have a quiet and private space for conducting the interviews. If an interview is done virtually all participants should find a secluded area where others will not overhear.

Interviewers can reassure participants that their responses will be de-identified in any analysis. Participants should be allowed to let the interviewer know if they prefer that a response not be included in any summary reports.

Building Trust and Rapport

During the interview, interviewers should be friendly and attentive, so the participants feel heard and valued. One of the key elements to achieving this is building trust, which can be done through several intentional actions:

- Be transparent about the process.
- Clarify how feedback will be used.
- Follow through on commitments.
- Provide reassurance about confidentiality.
- Start with a reminder about the intent behind conducting the interviews.

By employing these strategies, interviewers can foster an environment of trust where participants feel valued, respected, and safe to share their honest feedback.

Active Listening Techniques

Active listening is a valuable tool to make people feel valued.⁵ Techniques include:

- **Reflective listening:** Paraphrase what the speaker said.
- **Clarifying questions:** Ask specific questions to gain a deeper understanding of the speaker's comments.
- **Encourage responses:** Use verbal and non-verbal cues to encourage the speaker to continue.
- **Show empathy:** Show understanding of the speaker's feelings and experiences.
- **Avoid interruptions:** Let the speaker finish their thoughts.
- **Body language:** Use positive body language such as eye contact, relaxed posture, leaning in, nodding, and smiling.

Learn more about active listening here: [What Is Active Listening? \(hbr.org\)](https://hbr.org/2024/01/what-is-active-listening).

Cultural Sensitivity

Staff participating in stay interviews will likely have a diverse set of backgrounds and experiences. Practicing cultural sensitivity during the interviews will ensure staff feel accepted. Interviewers can use inclusive language, respect participant's personal boundaries and space, avoid making assumptions or stereotypes, and recognize and respect identities.

Documenting Responses Effectively

Interviewers should have a process to document responses received during the interviews so that they may be analyzed later. To prepare in advance, interviewers should familiarize themselves with the questions and prepare a template for documenting responses. A sample notes template is included in [Appendix D: Interview Note Sheet](#).

Notes can be simple and include highlights of what the participant says. Interviewers should avoid adding judgment or bias to the notes and instead focus on what the participant is saying. Clear documentation ensures that insights are captured properly and can be used to inform any follow-up.

⁵ Gallo, A. (2024, April 5). What is active listening?. Harvard Business Review. <https://hbr.org/2024/01/what-is-active-listening>

Designing Effective Interview Questions/Guides

Interview questions should prioritize areas that reveal employee satisfaction, concerns, and motivations.⁶ Questions should be open-ended to allow employees to elaborate on answers and provide insights. Managers interested in conducting stay interviews can determine what key areas they want to focus on. This could include job satisfaction, work environment, career development, work-life balance, recognition, feedback, culture, compensation, benefits, technology, values, or management.

Example Questions

For a thirty-minute interview, organizations should have a minimum of three to five questions. The below questions are provided as examples. PHIDH managers conducting stay interviews are encouraged to use questions that best address the intent for the stay interviews. Managers could also consider using the results of employee engagement surveys to inform the development of stay interview questions, enabling a deeper exploration of potential areas for improvement. By aligning stay interviews with survey insights, managers can gain a more comprehensive understanding of employee experiences, uncover specific concerns, and identify opportunities for enhancing retention, job satisfaction, and overall organizational effectiveness.

- What attracted you to our organization initially?
- What motivates you to continue working here?
- What do you enjoy most about your current role?
- What is one thing that could improve your job satisfaction or engagement?
- Do you feel you have all the tools and resources you need for your job? If not, what's missing?
- How would you describe the support and guidance you receive from your manager?
- How satisfied are you with your current work-life balance?
- What kind of recognition or feedback would be most meaningful to you?
- What improvements would you suggest for our organization over the next year?

⁶ Glass Door Team. (2021, April 13). Everything you need to know about a stay interview - glassdoor career guides. Glassdoor. <https://www.glassdoor.com/blog/guide/stay-interview/>

- Are there specific skills or experiences you're looking to gain in your current role?
- Is there anything else you'd like to share that we haven't covered?

Follow-up or probing questions on the initial response can help get more detailed information. Follow-up questions could include:

- Can you tell me more about that?
- Could you provide a specific example?
- What are your thoughts on the current situation?
- Is there anything you would like to add on this topic?
- Does this summary accurately reflect your views on the matter?

Avoiding Leading or Biased Questions

Questions for the interviews should be written in a neutral and unbiased manner. They should be framed in a way that does not imply the interviewer is looking for a specific response. This can be done by being specific, clear, and asking open-ended questions. Examples of leading or biased questions to avoid include:

- Aren't you happy with the recent changes in the office? This implies the employee is happy with the change.
- How great do you think our team's communication is? This suggests that communication is already great.
- How satisfied are you with the way we handle employee feedback? This indicates that staff are satisfied at least to some extent with how employee feedback is addressed.

Stay Interview Follow-Up

It is recommended that follow-up actions be implemented after conducting stay interviews to demonstrate that the insights gathered are effectively utilized. This may include integrating findings from the stay interviews into the action plans developed from employee engagement surveys, discussing key takeaways in staff meetings or retreats, or creating a separate action plan based on the interview data. The extent of commitment and effort dedicated to the follow-up plan may vary depending on resources, timing, and the outcomes of the interviews. Managers conducting stay

interviews should assess their capacity to commit to follow-up actions and communicate the intended impact of the stay interviews clearly to their staff.

After the stay interviews are complete, managers should set aside time to analyze the interview notes and identify recurring patterns or key themes within the data. These themes might include areas such as job satisfaction, career development, work-life balance, leadership effectiveness, compensation, or benefits. By recognizing these patterns, managers can gain deeper insights into employee concerns and motivations, allowing them to prioritize and select appropriate follow-up actions that could impact retention and overall engagement. An example summary report is included in [Appendix E: Summary Report](#). A short guide with links to resources for brainstorming and prioritization is included in [Appendix F: Brainstorming and Prioritization Tools](#).

Communicating Findings

Sharing findings and next steps will foster trust and keep staff informed. Managers should select the most effective platform for communicating about stay interview follow-ups, which could include email, meetings, or staff retreats. Additionally, offering opportunities for staff to provide feedback on the stay interview process through surveys or polls can be valuable for refining and enhancing future efforts. Managers could also consider discussing stay interviews during quarterly visual management board meetings or semi-annual report meetings to highlight their commitment to improving staff satisfaction.

Appendices

Appendix A: Checklist

A. Planning

- a. Assess capacity and determine the intended impact of the interviews and what next steps will be committed to.
- b. Identify the stay interview team — this could include program area managers collaborating with other managers or supervisors to review survey findings and brainstorm follow-up actions.
- c. Establish the timing of interviews.
- d. Identify which employees or groups will be asked to participate.
- e. Create a draft schedule for the interview sessions.

B. Select Format and Interviewers

- a. Choose the format for the interviews (e.g., in-person, virtual, survey).
- b. Select appropriate interviewers.
- c. Provide training for interviewers as appropriate.

C. Prepare Communication Materials

- a. Develop materials to introduce the stay interviews to staff, outlining objectives and benefits.

D. Schedule Introductory Meeting

- a. Organize a meeting with relevant staff to explain the purpose and process of the stay interviews.
- b. Address any questions or concerns from staff, ensuring they understand the interview's value.

E. Send Invitations

- a. Email invitations to selected staff to participate.
- b. Include details such as date, time, format, and any preparatory instructions.
- c. Share questions along with the invitation so staff can reflect before the interview.

F. Conduct the Interviews

- a. Execute the interviews according to the planned schedule and format.
- b. Ensure that interviews are conducted professionally and consistently, capturing detailed and accurate responses.

G. Analyze Findings and Identify Follow-Up

- a. Compile and review the responses from all interviews.
- b. Identify key themes, trends, and insights from the collected data.
- c. Develop action plans or next steps to address identified issues or areas for improvement based on feedback.
- d. Implement the agreed-upon follow-up items as appropriate and monitor their impact.

H. Communicate Results to Staff

- a. Share high-level themes and key takeaways with employees in a transparent manner.
- b. Outline any action items or next steps that will be taken in response to the feedback.

Appendix B: Interview Request Email

Dear Team,

As discussed in our recent staff meeting, we are introducing stay interviews to enhance employee feedback and retention. Stay interviews help us understand why you chose to join and stay with our organization, providing insights on what we should continue to do to keep our teams engaged. We invite you to participate in these interviews, which will be kept confidential. A summary of the findings will be shared along with any follow-up items or next steps.

The interview will take approximately 30 minutes. Please review the attached list of questions and choose a preferred time slot from the options below. The interview can be conducted in person or virtually—please indicate your preference.

- Time Option 1
- Time Option 2
- Time Option 3
- Time Option 4

Kindly respond with your preferred time slot.

Thank you for your participation.

Best regards,

Appendix C: Opening Script

Thank you for joining me today for this stay interview.

The goal of this interview is to understand why you joined and continue to stay with our organization. I've sent you a set of questions—have you had a chance to review them? [Wait for their response.]

I'll ask you these questions and take notes on your responses.

Optional: Please note that this conversation will be recorded to assist with notetaking. I will do my best to keep the information as private as possible. If you prefer not to be recorded, please let me know, and we can proceed without recording.

Your answers will be de-identified, and a summary report will be shared with staff.

I may ask follow-up or clarifying questions as we go along. Do you have any questions before we begin?

Appendix D: Interview Note Sheet

Interviewer:	
Questions	Notes
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Appendix E: Summary Report

Stay Interviews with *the number of staff interviewed members of the teams or departments interviewed* were conducted.

Questions asked included:

-
-

The table below displays the most mentioned themes and direct recommendations.

Theme	Positives	Areas of Improvement
<i>Short description of theme</i> Number of mentions:	<i>Notes on how the theme was mentioned positively.</i>	<i>Notes on any areas of improvement or recommendations related to the theme.</i>
Number of mentions:		
Number of mentions:		

Appendix F: Brainstorming and Prioritization Tools

Below is a brief description of each tool along with a link for additional details and instructions.

Idea Boards

An idea board is a straightforward tool designed to facilitate brainstorming. Gather key stakeholders in a room and encourage everyone to share their ideas freely. Designate a scribe to record all contributions on the board. Utilizing sticky notes is helpful as it allows for easy reorganization of ideas into categories later. For virtual sessions, tools like Lucidchart offer effective online alternatives.

[How to Create Virtual Idea Boards for Work | Lucidchart Blog](#)

Brainwriting

Brainwriting is a brainstorming technique that prompts participants to record their ideas independently before sharing them with the group. In its simplest form, a moderator or facilitator presents a central theme or topic and allocates a specific amount of time for each participant to jot down their ideas. Once the time is up, participants submit their ideas to the facilitator, who then leads an open discussion based on the collected input.

[What is brainwriting? Methods, instructions, & templates | Mural](#)

Impact Effort Matrix

An Impact Effort Matrix is used to evaluate and prioritize tasks. One axis measures effort, ranging from low to high, while the other measures impact, also from low to high. Collaborate with your team to position all brainstormed solutions within this matrix, helping to determine where to focus efforts most effectively.

High Effort		
Low Effort		

	Low Impact	High Impact

[Guide: Impact and Effort Matrix - Learn Lean Sigma](#)

Dot Voting

Dot voting is a group voting method used to identify team preferences from a list of options. It is a quick and straightforward process for narrowing down choices, prioritizing ideas, and determining the most popular options. To conduct dot voting, first present all ideas in a visual format. Each participant is given a set of dot stickers; a common guideline is to allocate a number of dots equal to 25% of the total options. For example, if there are 12 options, each person receives three dots. Participants then place their dots next to the ideas they support and the votes are totaled.

[How to Use Dot Voting for Group Decision-making | Lucidspark](#)