


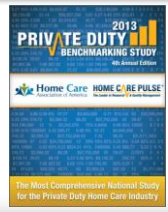


The Academy for Private Duty Home Care™ is a membership network of successful owners, CEOs, and administrators of high-performance, private pay, non-medical home care companies who want to grow their businesses and get ready for the future. As a **Registered Member** of the Academy you will have access to 30 free videos on the topics in our 27 Elements of a Highly Effective Home Care Company Matrix. As a **Premium Member** of the Academy, you also have access to additional Online Learning resources and our monthly live web conferences at no additional cost. www.private-duty-academy.org

Caregiver Quality Assurance is the industry leading program for recruiting, selecting, and retaining the best caregivers. As a member of **CQA**, you'll have access to advanced psychological testing to help you determine that the caregivers you send into a client's home are trustworthy, dependable and qualified to provide top quality care. A more effective and efficient caregiver selection process is our promise. www.caregiverquality.com



**Taking Action
Recruitment & Retention Findings
The 2013 Private Duty Benchmarking Study**



Housekeeping

- » Everyone is on mute
- » **IMPORTANT** – For the best quality audio, suggest using your telephone and not your computer's microphone
- » Type your questions in the question box and we will address them at the end of the call
- » Please "be present" today, pretend we are in a classroom together
- » Please take the one question survey when leaving the presentation
- » **Don't miss the important announcement about bestofhomecare.com at the end of the webinar!**

Who Are We?

Leading Quality Management Firm for the Home Care Industry



Founders and Creators of the Largest National Study for Home Care



About the Presenters



Aaron Marcum, CEO & Founder of Home Care Pulse



Stephen Tweed, Chairman & CEO of Leading Home Care

Goal of Presentation

*Focus on the **recruitment & retention** findings of the study, bring in real world application of those findings, and present powerful concepts that will help you grow to the next level*

“The Five Dials”



Top 5 “Dials” Recruitment & Retention

As Found in The 2013 Study

- 1) **Top Caregiver Recruitment Sources**
 - 1) Quality
 - 2) Quantity
- 2) **Reasons Why Your Caregivers Choose to Work at Your Agency Over Others**
- 3) **The Characteristics & Abilities of Your Caregivers**
- 4) **Caregiver Turnover Rates**
- 5) **Caregiver Engagement Score (CES)**

Dial #1 – Top Caregiver Recruitment Sources

Pg. 122

- » **Tracking Method**
 - Ask Them! “How did you find out about the position?”
 - Record in your scheduling software / Contact Database System
- » **Purpose**
 - Helps you target the sources that provide you with the best applicants
 - Saves you time and money
 - Retention starts first with hiring (recruitment & screening)
- » **The Challenge**
 - Knowing what sources provide you with the best quality vs. quantity
 - Diversifying
 - Resources & time to target the best sources

Top 10 Caregiver Recruitment Sources - Leaders

Pg. 122



Top Recruitment Sources Q&A

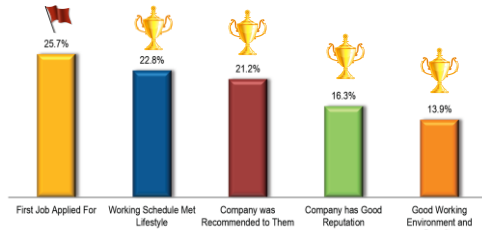
- » *What tips do you have on making these top recruiting techniques work for you?*
- » *Are there other recruiting techniques that you have found to be effective that are not being widely used (refer to pgs. 123-124)?*
- » *What suggestions do you have regarding employee referral programs (refer to pgs. 127-128)?*
- » *Of the Top 10 Sources for Leaders, which ones attract top quality candidates vs. a large quantity of candidates?*

Dial #2: Reasons Why Your Caregivers Choose to Work at Your Agency Over Others

Pg. 125

- » **Tracking Method**
 - Ask Them!
 - Excel, database, etc.
 - Not to be confused with, "How did you hear about us?"
- » **Purpose**
 - Helps you narrow in on what is motivating applicants to choose to work for your home care business
 - Might provide insight on what makes your home care business unique through the eyes of your caregivers.
 - Allows you to pinpoint and take action when they provide you with "weak" reasons for choosing to work for you, such as "It was the first job I applied for."
- » **The Challenge**
 - Tracking an intangible. Must be specific when asking. Also, answers are often biased if you ask them...

Top 5 Reasons Caregivers Choose to Work for an Agency Pg. 125



*Each month Home Care Pulse conducts thousands of interviews with clients and professional caregivers as part of our Quality Satisfaction Management Program. One of the questions we ask caregivers is: "Why did you choose to work for this agency over others?" These top 5 reasons are based on this research.

Reasons Why Caregivers Choose Your Agency Q&A

» *In the Home Care Pulse caregiver satisfaction phone interviews, is higher pay ever cited as a reason for working at an agency?*

» *Once a provider has identified the majority of reasons, how can they best use this information to improve their recruitment & retention efforts?*

» *When do you ask them, "Why did you choose to work for us over others?"*

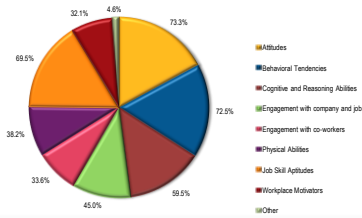
Dial #3: The Characteristics & Abilities of Your Caregivers

- » **Tracking Method:** Pgs. 129-132
 - Online Caregiver application (Pg. 129)
 - Professional Background Checks (Pg. 130)
 - Drug Screening (Pg. 130)
 - Caregiver Pre-employment Assessment Tool (Pgs. 131-132)
 - Scheduling Software
- » **Purpose:**
 - Key caregiver screening tool
 - Helps identify the strengths & weaknesses of your caregivers
 - Can improve the quality of caregiver you hire by tenfold
 - Helps you better match the right caregiver with the right client
- » **The Challenge:**
 - Relying solely on a caregiver application as a way to glean characteristics and abilities is risky and is never the full picture

Pre-Employment Assessments - Characteristics Measured - Pg. 131

» **Looking for a competitive advantage?** Only 22% of the home care businesses surveyed use a Online Pre-Employment Assessment (pg. 131).

Characteristics Measured by Pre-Employment Assessment



Characteristics & Abilities Q&A

- » *How thorough of a background check would you suggest (refer to pg. 130)?*
- » *How often and when would you suggest drug screening tests for your caregivers (pg. 130)?*
- » *What is your experience with pre-employment assessments as a selection tool?*
- » *Did Aaron use a pre-employment assessment tool for when he had his home care agency (pg. 132)?*

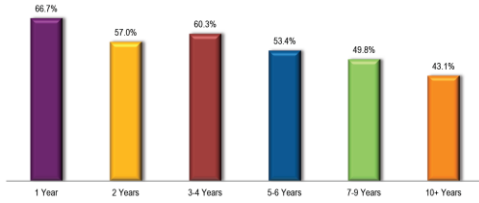
Dial #4: Caregiver Turnover Ratio

Pgs. 133-134

- » **Calculation:**
 - See pg. 133
- » **Purpose:**
 - One of the best measurements related to caregiver retention
 - Tells you the % of your caregivers that leave your company every year/12 months
- » **The Challenge:**
 - Being consistent and taking the time to track it
 - Identifying the external vs. internal factors causing your turnover

Caregiver Turnover Rate by Years In Business

Pg. 134

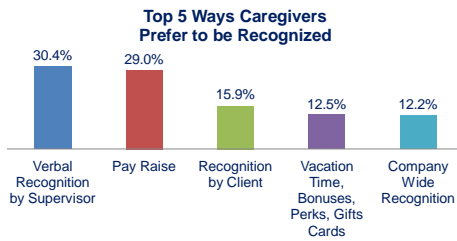


Caregiver Turnover Q&A

- » *Why do you think caregiver turnover has been going up the past three years?*
- » *What techniques can companies use to reduce caregiver turnover?*
- » *What is an acceptable caregiver turnover rate?*
- » *How will reducing caregiver turnover help home care businesses prepare for possible "caregiver shortages" in the future (pg. 142)?*

How Do Caregivers Like to Be Recognized?

Pg. 135



*Data based on thousands of caregiver satisfaction interviews performed by Home Care Pulse

Dial #5: Caregiver Engagement Score (CES)

» **The Most Important Question:**

– Based on 1 single caregiver satisfaction question: **“How likely is it that you would recommend employment at [company name] to others?”** Scale of 1-10, 10 being “highly recommend.”

» **Promoters** (Score 9-10): Loyal team members who thoroughly enjoy working for you and have no hesitation referring others to do the same!

» **Passives** (Score 7-8): Satisfied but unenthusiastic and vulnerable to higher wages and other benefits

» **Detractors** (Score 0-6): Unhappy caregivers who can damage your client relationships and impede growth through negative word-of-mouth

Dial #5: Caregiver Engagement Score

» **Calculation:**

– $(\% \text{ of Promoters} - \% \text{ of Detractors}) = \text{Caregiver Engagement Score}$

– For Example:

- Total of 20 Caregivers Interviewed: 16 Promoters, 2 Passives, & 2 Detractors.
- % of Promoters = 80%
- % of Detractors = 10%
- $(80\% - 10\%) = 70\%$
- Net Promoter Score = 7.0 (Passive Score)

» **Purpose:**

- Helps raise the bar and keep all key team members focused on caregiver recognition and other retention techniques
- Sends the message to the entire team that you cannot afford to have “detractors” or “passives.”
- To focus attention on what you are doing right/wrong...not what the caregiver themselves!

» **Challenge:**

- Invalid if you ask this question and measure NPS on your own. Promotes biased responses.

Dial #5: Caregiver Engagement Score Cont...

» **Purpose:**

- Helps raise the bar and keep all key team members focused on caregiver recognition and other retention techniques
- Sends the message to the entire team that you cannot afford to have “detractors” or “passives.”

» **Challenge:**

- Invalid if you ask this question and measure CES on your own. Promotes biased responses.
- Caregivers **MUST** be anonymous and have no fear of retribution
- Must be consistent with a large enough sampling

Caregiver Engagement Q&A

- » *What if, after finding out my CES, my company is full of "passive" or even "detractor" caregivers? What actions can I take to change this?*
- » *Can I gather my CES using a mailed survey?*
- » *How often should I measure my CES?*
- » *Why is anonymity important when measuring CES?*
- » *What is an acceptable caregiver turnover rate?*
- » *How will reducing caregiver turnover help home care businesses prepare for possible "caregiver shortages" in the future (pg. 142)?*

HOME CARE PULSE®

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Special thanks to – Stephen Tweed & Leading Home Care

QUESTIONS
